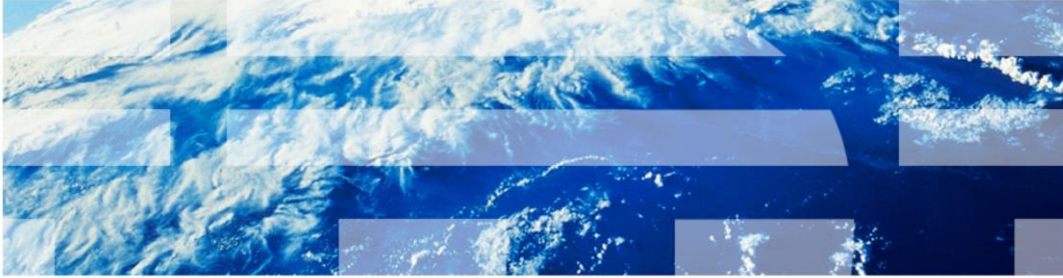# IBM Maximo Asset Management V7.1

Configuring work order status changes with the Automated Flow Control feature

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This training module for Maximo® Asset Management version 7.1 demonstrates how to use Automated Flow Control to govern the status change rules in a hierarchy.

Objectives

When you complete this module, you can perform these tasks:

- Define the start and completion statuses governing flow control
- Enable flow control on work orders and their tasks
- Set predecessor tasks
- Test the flow control by changing the status of the parent work order
- Test the flow control by changing the status of predecessor tasks

Configuring work order status changes with the Automated Flow Control feature

This training module covers enabling flow control on a work order record and its tasks, defining the start and completion statuses of a work order, adding tasks that have predecessors, and testing the flow control by changing the status of both the parent work order and the interim tasks.

Automated Flow Control overview

Automated Flow Control provides these capabilities:

- Allowing status changes to be processed automatically in work hierarchies
- Specifying the order that tasks are performed
- Automatically completing work orders when all tasks have been completed
- Blocking manual status changes

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Maximo Asset Management work orders consist of individual tasks. Work order tasks are completed one before the other in a serial chain hierarchy.

Maximo Asset Management V7.1 provides the capability to define precedence connections between work orders and between work order tasks.

Configuration of the Automated Flow Control feature initiates an automated serial sequential update of work order statuses and work order task statuses.

For example, if flow control sequencing is enabled at the Job Plan level, each task generated when applying the Job Plan to a work order evaluates the one before it to determine if it has completed.

If the predecessor work order or work order task has started then its status is automatically changed to IN PROGRESS. Any successive tasks cannot have their status changed to IN PROGRESS until the immediate predecessor work order or work order task has completed. As such, the status of work orders cannot be changed to COMPLETE until all tasks have been completed in the order in which they are sequenced. When all tasks are completed, their work order statuses are automatically changed to COMPLETE.
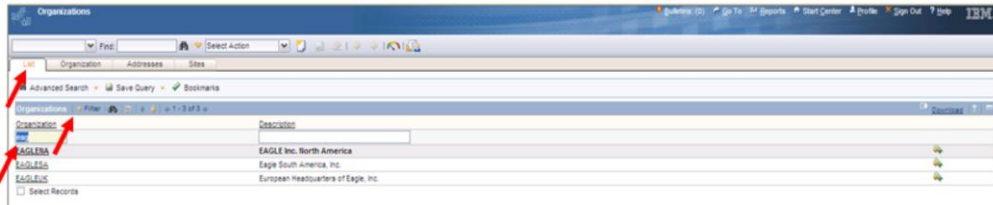
Opening the Organizations application

Click **Go To** > **Organizations**

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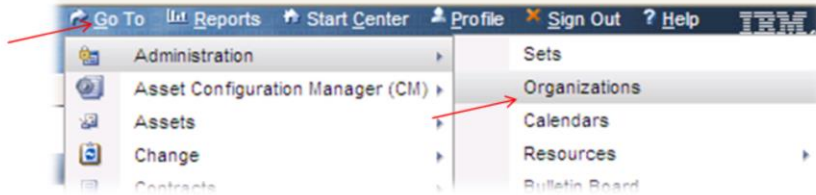
From the **Go To** menu click **Organizations**.

Selecting from available organization names

- Select the **List** tab in the Organizations application
- Enter a value in the **Organization** box to assist in the organization search
- Click **Filter** to see the available organizations

Enter the name of the organization by entering the name into the **Organization** field. Optionally, you can click **Filter** to help find the organization name. Select an organization from that list.

Selecting the work type

- From the Organizations application click the **Select Action** menu
- Select **Work Order Options** > **Work Type**
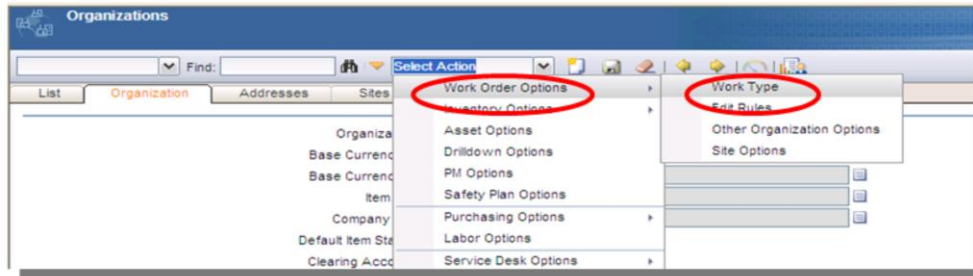
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Work orders have tasks and work types. Work types are templates designed for a specific work order category. To set the start and finish statuses go to the **Select Action** menu. From the **Select Action** menu select **Work Order Options**. Next, select **Work Type**. This action opens the Work Type window.

The default statuses governing flow control are In Progress (INPRG) and COMPLETE (COMP).

Configuring work type parameters

- Click the **View Details** icon to expand a row
- Click the **Select Value** icon to select the applicable status

Open the Work Type application. Expand a row by clicking the **View Details** icon. The icon is located to the left of the row. Click the **Search** icon located to the right of the **Start Status** field. Select from the available values for the start status. Repeat this search and select the procedure for the **Complete Status**.

Enabling automated flow control on a work order and its tasks

- Click **New Work Order**
- Select the **Under Flow Control** check box
- Clear the **Inherit Status Changes** check box

In this slide, flow control is being enabled on a work order. First, open the Work Order Tracking application. Next, click the **New Work Order** icon. Select the **Under Flow Control** check box and clear the **Inherit Status Changes** check box.

Creating work order tasks

To create multiple tasks:

- Go to the Work Order Tracking application

- Select the **Plans** tab, then click **New Row**

- Enter summary content for a task and save the record

- Repeat these steps for the next task

In this slide, the task creation procedure is demonstrated. Go to the **Plans** tab and click **New Row**. A new task row appears. Add summary text in the **Summary** field that describes the new task.

Setting a predecessor task

Use this method to begin setting a predecessor task:

- Click the **View Details** icon to expand line Task 20
- Click the arrow to the right of the **Predecessors** field

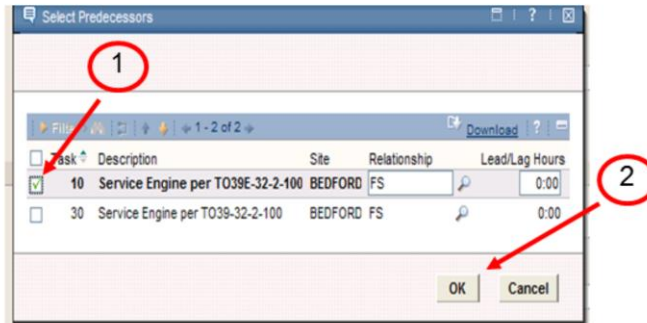Configuring work order status changes with the Automated Flow Control feature   © 2012 IBM Corporation

In this slide, the **Tasks for Work Order 1168** appears. Click the **View Details** icon located to the left of Task 20. The information sections for Task 20 appear. Next, click the arrow located to the right of the **Predecessors** text box of the **Scheduling Information** section.

Selecting predecessor tasks

Use this method to add a predecessor to Task 20:

- Select the **Task 10** check box under **Task**
- Click **OK**

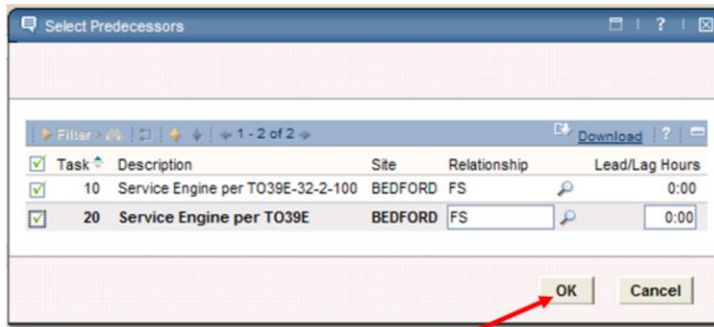Configuring work order status changes with the Automated Flow Control feature   © 2012 IBM Corporation

In this slide, the **Select Predecessors** text box opens. These are the two tasks under work order 1168. Select the **Task 10** check box to configure Task 10 as a predecessor for Task 20. Click **OK** to complete the predecessor selection.

Adding a predecessor task

Use this method to add some predecessors to Task 30:

- Select **Task 10** and **Task 20** as predecessors
- Click **OK**

Here two predecessors are added to Task 30 of a work order. All listed tasks are selected as predecessors to Task 30. To accomplish this configuration, three check boxes are selected: the **Task** check box, the **10** check box, and the **20** check box.

Changing the status of the parent work order

- Click the **Change Status** icon
- The Change Status window opens
- Select the **In Progress** status and click **OK**
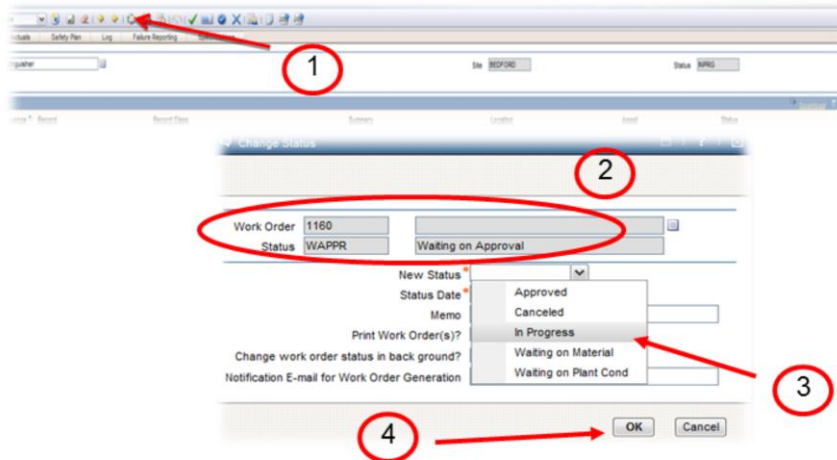
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In this slide, a parent work order is having its status changed manually. The parent work order in the **Work Order** field is 1160 and the current status in the **Status** field is Waiting on Approval. The Change Status screen has been opened for this parent work order in order to change its status from Waiting on Approval to In Progress. The **New Status** field and the **Status Date** field must be filled in for all parent work order status changes. The other **Change Status** fields are optional.

Changing the status of a parent work order

- The status of the parent work order changes to INPRG
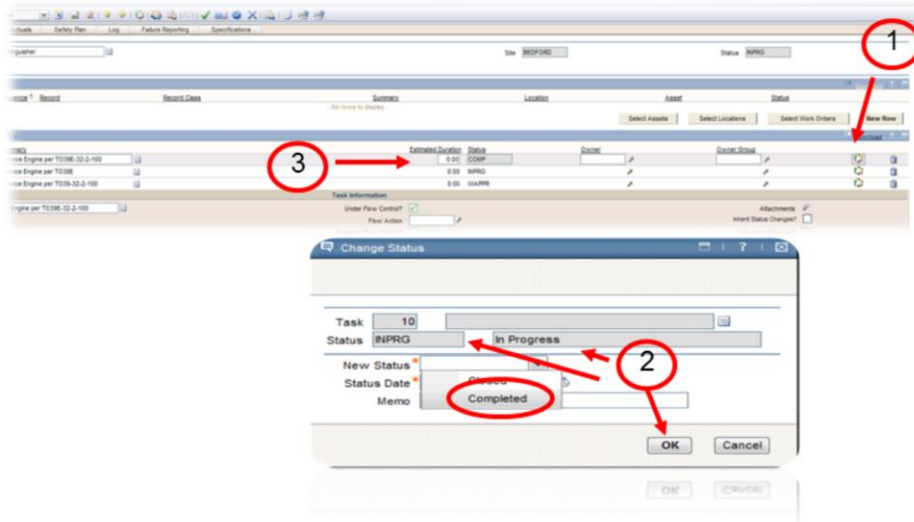- The status of the first task in the sequential chain changes to INPRG

The **Plans** tab content is viewed here. The **Status** field of the parent work order and the **Status** field of the first task in the parent work order have both been changed to in progress.

A change in status of one task automatically changes the status of successor tasks. Change the status of Task 10 to **Completed** and click **OK**. Notice that the next task in the sequential chain goes to in progress.

Changing the status of task 20

Changing the status of task 20 to COMP changes the status of Task 30 to INPRG
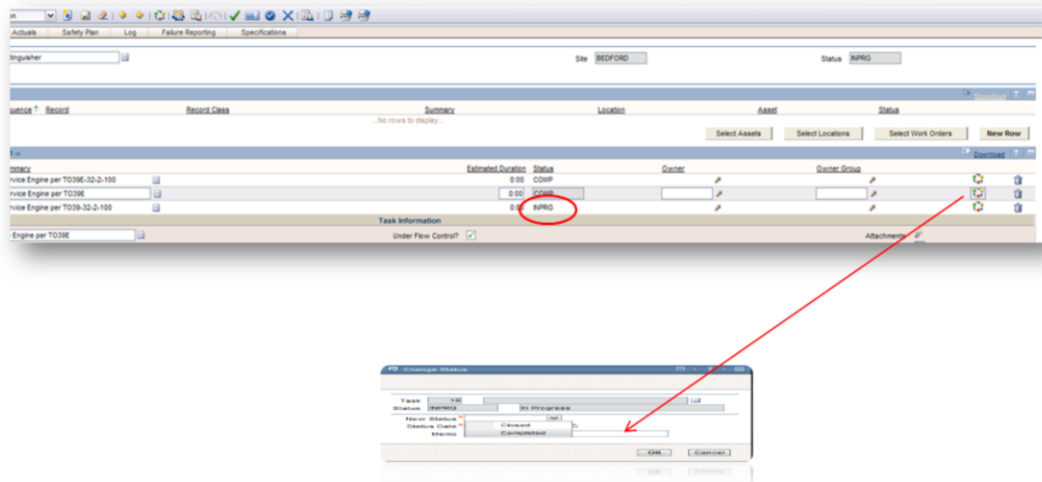
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The next sequential task is Task 20. The status of Task 20 changes from in progress to complete. The next task in the sequential chain, Task 30 in this case, changes to in progress.

Completing the final task

Use the same method to change the status of the last task and click **OK**

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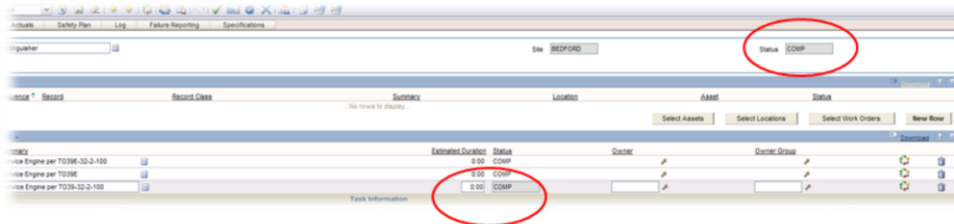
Use the same method to change the status of the last task and click **OK.** This action completes the task. This action also completes the parent work order.

Summary

Now that you have completed this unit, you can perform these tasks:

- Enable flow control on a work order record and its tasks
- Define the start and complete status of the work order
- Add predecessors to tasks
- Test the flow control by changing the status of the parent work order
- Test the flow control by changing the status of predecessor tasks

Now that you have completed this unit, you can perform these tasks:

Enable flow control on a work order record and its tasks .

Define the start and complete status of the work order

Add predecessors to tasks

Test the flow control by changing the status of both the parent work order and work order tasks

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