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| BR 1.4 |
| The system shall allow for routing functionality within the application. |
| FR 6.1.1 |
| The system will contain new workflow, menu and security group configuration. |
| DS1-01 |
| Workflow configuration is documented in the Application Configuration Specification (ITPD-37061) |
| BR 4.10 |
| The system will have ability to assign multiple pieces of equipment to a work order. |
| FR 6.1.2 |
| The system will ensure that the equipment location on PM schedules will stay current with the location on the equipment record. |
| DS1-02 |
| Installation Parameter CASCLOC is set to ‘YES’ |
| BR 1.8 |
| The system shall have the capability to configure field name labels, where appropriate, in order to comply with corporate nomenclature. |
| FR 6.1.4 |
| All displayed dates should be of the format “DD-MMM-YYYY”. |
| DS1-04 |
| The date format is set within Locales screen.  The date format is DD-MON-RRRR which translates into DD-MMM-YYYY. |
| BR 1.8 |
| The system shall have the capability to configure field name labels, where appropriate, in order to comply with corporate nomenclature |
| FR 6.1.5 |
| Whenever time is displayed or entered the 24-hr clock should be used. |
| DS1-05 |
| Default setting.  Unable to modify.   24 hour clock is the only time that is used. |
| BR 1.1 |
| DELETED The system shall be capable of supporting the entire enterprise with respect to geography, multiple organizations, multiple languages and multiple currencies, and be available to all authorized users 24 hours a day, 7 days a week except for planned maintenance or upgrades. |
| FR 6.1.6 |
| The system must support multiple time zones by organization. |
| DS1-06 |
| Server time offset field on the Organization |
| BR 7.2 |
| The system shall provide standard reports, as well as the ability for a user to create and save searches. |
| FR 6.1.7 |
| CMMS built-in Cognos reporting functionality will be used for reporting. |
| DS1-07 |
| Default reporting tool. |
| BR 10.1 |
| The system shall provide the ability to interface with active directory |
| FR 6.1.9 |
| BR  3.8 |
| The system shall be able to route and track revisions to preventative maintenance plans. |
| FR 6.1.10 |
| The system will have a revision approval process for PM Schedules, Job Plans, Material Lists, and Routes. |
| DS1-10 |
| The native revision control of the application is active. Any changes to a PM Schedule, Job Plan, Material List, or Route will create a new revision of these PM Entities. |
| BR 3.10 |
| The system shall be able to calculate due dates for preventive maintenance. |
| FR 6.1.11 |
| The system will provide the ability to correctly calculate preventative maintenance due dates based on PM Schedule frequency, PM Schedule revisions, and PM Extensions. |
| DS1-11 |
| PM due dates should be calculated as part of base functionality of the system based on PM frequency with the generation of PM work orders.  Changes to PM due dates altered by PM revisions should be governed by FLEX SQL that checks to keep due dates synchronized.  PM extensions should allow the modification of PM due dates on work orders generated by the system. |
| BR 1.1 |
| DELETED The system shall be capable of supporting the entire enterprise with respect to geography, multiple organizations, multiple languages and multiple currencies, and be available to all authorized users 24 hours a day, 7 days a week except for planned maintenance or upgrades. |
| FR 6.2.1 |
| The system will provide the ability to support multiple physical sites (separated geographically), as well as multiple currencies in the same database. |
| DS2-01 |
| Locales and Organization supplies this information. |
| BR 8.1 |
| The system shall provide security to allow or disallow functionality on the system level, site level, and user level. |
| FR 6.2.2 |
| The system will provide the ability to separate data by organization (site), allowing some users access only to their local data, while allowing authorized users to view all data within the database.  This viewing will be permitted through validated system screens and reports only. |
| DS2-02 |
| User Group, User Organization, Department Level Security and Store Security supplies this information. |
| BR 1.12 |
| Ability for users to personalize home page with KPI’s and Inboxes |
| FR 6.2.4 |
| Individual system users will be able to customize their home page with relevant inbox and key performance indicators (KPI) information. |
| DS2-04 |
| Inboxes and KPI’s need to be defined prior to adding these to the homepage. |
| BR 1.13 |
| Ability to search for users by User Group. |
| FR 6.1.12 |
| The system will allow users to search for other users in the system by using a lookup grid containing these fields: User Code, Employee ID, User Description, Role, Org, Default Org, and Out of Service. |
| DS1-12 |
| User Lookup Grid allows users to search for users by name or User Group. See Grid Specifications in Appendix D of the Design Specification. |
| BR 1.14 |
| The system shall control and store the list of equipment validated for use in manufacturing a specific product (BOE) |
| FR 6.1.13 |
| The system enables authorized users to generate Bill of Equipment records detailing lists of Equipment validated for use in manufacturing a specific product and the status of the Equipment; as well as to associate the Equipment on the BOE with the attribute settings required by the BOE. |
| DS1-13 |
| User Defined Screens display BOE Equipment and required attribute settings. |
| BR 1.15 |
| The system shall control and store product-specific manufacturing parameters (attribute settings). |
| FR 6.1.14 |
| A settings tab on the BOE will detail existing Equipment attribute settings relevant to manufacture of the corresponding product. |
| DS1-14 |
| User Defined Screen supports attribute settings on BOE. |
| BR 1.16 |
| The system shall allow the user to select the equipment to be used for a manufacturing campaign from the BOE. (IEL) |
| FR 6.1.15 |
| A button will be available on Equipment Change Request (ECR) records to populate the Incoming Equipment List (IEL) from the corresponding BOE. |
| DS1-15 |
| User Defined Screen supports generation of IEL via selection of Equipment from a BOE with a customized button. |
| BR 1.17 |
| The system shall assert SME Review of all BOE and attribute changes. |
| FR 6.1.16 |
| BOE will be revision controlled and support an SME review status prior to approval. |
| DS1-16 |
| BOE records will be configured as a revision controlled record via the Revision Controlled eRecords Setup screen. |
| BR 1.18 |
| The system shall assert QA Review of all BOE with settings listed in PCD. |
| FR 6.1.17 |
| BOE will be revision controlled and applicable BOE will support a QA review status prior to approval, independent of the Type values assigned to Settings on the BOE. |
| DS1-16 |
| BOE records will be configured as a revision controlled record via the Revision Controlled eRecords Setup screen. |
| BR 1.6 |
| Users shall be able to define and save viewing properties (Dataspy). |
| FR 6.2.5 |
| The system will allow users to alter the viewing structure of screens, such as equipment, job plans (task instructions), preventive maintenance (PM) routines and work orders.  The system must also allow users to save the altered layout for future use. |
| DS2-05 |
| System Administration functions.   Screen Designer functionality. |
| BR 1.6 |
| Users shall be able to define and save viewing properties (Dataspy). |
| FR 6.2.6 |
| Individual system users will be able to define and save screen filters and data sorts. |
| DS2-06 |
| All users are able to save sorts and filters. |
| BR 1.7 |
| The system shall be able to store and attach electronic documents throughout the application. |
| FR 6.2.7 |
| The system will allow for the storage and attachment of documents, images, and drawings to records such as equipment, work orders, PMs, parts, requisitions, and vendors. |
| DS2-07 |
| Documents can be   attached to the Documents tab on the equipment, work orders, PMs, parts, requisitions, and vendors records. |
| BR 1.8 |
| The system shall have the capability to configure field name labels, where appropriate, in order to comply with corporate nomenclature. |
| FR 6.2.8 |
| The system will allow for the configuration of field name labels as appropriate to comply with corporate nomenclature. |
| DS2-08 |
| Screen Designer and Global Text Changes allow for this functionality. |
| BR 1.9 |
| DELETED The system shall provide on-screen help and display error messages for all CMMS functional components |
| FR 6.2.9 |
| The system will provide pop-up windows identifying and explaining errors when they occur. |
| DS2-09 |
| FLEX SQL can also trigger an error with an explanation. |
| BR 3.1 |
| The system shall allow for the creation /modify of equipment, systems, and locations, as well as associated detailed information for each equipment record. |
| BR 3.1 |
| The system shall allow for the creation /modify of equipment, systems, and locations, as well as associated detailed information for each equipment record. |
| FR 6.3.2 |
| The system will be able to maintain equipment records with ID/Equipment numbers up to 20 characters long. |
| DS3-02 |
| Defined in the database.   Technical Reference guide details 30 character limit. Screen Designer will provide the field details. |
| BR 3.5 |
| The system shall be able to store equipment numbers and corresponding detailed information |
| FR 6.3.4 |
| The system will allow read-only viewing of equipment move transactions into or out of a location. |
| DS3-04 |
| This is located on the Events tab of the Equipment record. |
| BR 3.5 |
| The system shall be able to store equipment numbers and corresponding detailed information |
| FR 6.3.5 |
| The system will be able to identify equipment as GMP or non-GMP, direct or indirect, and critical or non-critical. |
| DS3-05 |
| Screen Designer allows for this setup. |
| BR 3.3 |
| The system shall have the ability to create and maintain a parent – child hierarchy. |
| FR 6.3.6 |
| The system will allow the creation and/or viewing of equipment hierarchies. |
| DS3-06 |
| This is located on the Structure tab of the Equipment record. |
| BR 3.4 |
| The system shall have the ability to create and maintain a spare parts list for each equipment item. |
| FR 6.3.7 |
| The system will be able to create and maintain a spare parts list for each equipment item. |
| DS3-07 |
| This is located on the Parts Associated tab of the Equipment record. |
| BR 3.2 |
| The system shall have the ability to differentiate between Equipment classifications |
| FR 6.3.8 |
| The system will be able to store equipment numbers and corresponding information such as description, type, make, model, serial number, classification, location, system number, vendor, old equipment number, operating status, process and instrumentation diagram (P&ID) tag numbers, P&ID drawing numbers, assigned cost center, and a history of maintenance costs. |
| DS3-08 |
| This is located on the Record View, Cost and Calibration tabs of the Equipment record. Old Equipment number can be stored within comments and/or description. |
| BR 3.6 |
| The system shall be able to store closing  codes  to construct accurate histories of the failures that affect equipment and operating locations |
| FR 6.3.9 |
| The system will be able to store failure code to assist in the diagnosis of failures that affect equipment and operating locations. |
| DS3-09 |
| Closing Codes are defined.  Problem, Failure, Cause and Action Codes are defined. |
| BR 3.6 |
| The system shall be able to store closing  codes  to construct accurate histories of the failures that affect equipment and operating locations |
| FR 6.3.10 |
| The system will allow the association of failure codes to work orders so that failure trends can be captured and analyzed. |
| DS3-10 |
| Closing Codes are defined.  Problem, Failure, Cause and Action Codes are defined. |
| BR 3.7 |
| The system shall provide the capability to maintain preventive maintenance records, and associate them with equipment and locations |
| FR 6.4.1 |
| System PM Schedule records will allow for the addition, modification, and deletion of such information as, description, classification, schedule/due dates, equipment and trade requirements. |
| DS4-01 |
| Located on the Record View, Activities and Equipment tabs of the PM Schedules record. |
| BR 3.9 |
| The user shall be able to associate a job plan (task instruction) with each PM record. |
| FR 6.4.2 |
| The system will have the ability to create, revise, and view job plan instructions. |
| DS4-02 |
| Located on the Record View and Checklist tabs of the Job Plan record. |
| BR 3.7 |
| The system shall provide the capability to maintain preventive maintenance records, and associate them with equipment and locations |
| FR 6.4.3 |
| The system will allow a PM frequency to be specified in days, weeks, months, or years. |
| DS4-03 |
| Located on the Record View and Equipment tabs of the PM Schedules record. |
| BR 3.8 |
| The system shall be able to route and track revisions to preventative maintenance plans. |
| FR 6.4.4 |
| The system will be able to track revisions for PM entities.. |
| DS4-04 |
| PM entity revisions can be tracked on the Revision Control reports, Revision Change Details tab (PM Schedule, Job Plan, Material List, & Route screens), Associated Revisions tab (PM Schedule screen), Associated PM Revisions tab (Equipment screen) and the system audit trails. |
| BR 3.7 |
| The system shall provide the capability to maintain preventive maintenance records, and associate them with equipment and locations |
| FR 6.4.5 |
| The system will be able to associate PM schedules with job plan instructions, material lists, attached documents, estimated labor, and tools. |
| DS4-05 |
| Tools, estimated labor (on Job Plan record), attached documents, job plan instructions and material lists all can be associated to a PM on the PM Schedule record. |
| BR 3.9 |
| The user shall be able to associate a job plan (task instruction) with each PM record. |
| FR 6.4.6 |
| The system will allow the viewing, addition, modification, and deactivation of job plan records. |
| DS4-06 |
| This is all managed on the Job Plan record. |
| BR 4.3 |
| The system shall allow the authorized user to plan, create, reject, review, modify, approve, and cancel work orders against equipment, as well as locations. |
| FR 6.4.7 |
| The system will have the ability to calculate scheduled due dates from defined preventive maintenance intervals based on prior scheduled due date or prior work order completion date. |
| DS4-07 |
| This is managed on the Equipment record tab of the PM Schedule and PM Schedules tab of the Equipment record. |
| BR 4.1 |
| The system shall allow the Company A corporate intranet authorized user community to create work requests in the system. |
| FR 6.4.8 |
| The system will allow authorized users to create work requests via the Company A intranet. |
| DS4-08 |
| Work Requests functionality allows for all authorized users on the Company A domain.  All users who have a network access. |
| BR 4.2 |
| The system shall allow the Company A corporate intranet authorized user community to check the status of any work request. |
| FR 6.4.9 |
| The system will allow authorized Company A corporate intranet users to check the status of the work requests that they have submitted. |
| DS4-09 |
| Work Request Status functionality allowed for all authorized users on the Company A domain.  All users who have a network access. |
| BR 4.3 |
| The system shall allow the authorized user to plan, create, reject, review, modify, approve, and cancel work orders against equipment, as well as locations. |
| FR 6.4.10 |
| The system will allow authorized users to plan, create, review, reject, modify, approve, and cancel work orders and work requests for equipment and/or locations. |
| DS4-10 |
| Access is defined on the User Group, user setup records, and Flex SQL rules. |
| BR 4.8 |
| The system shall be configurable to incorporate multiple work flows for various types of work and their associated processes |
| FR 6.4.11 |
| The system will allow processing of work orders to route, complete, review, approve, and close, in compliance with the business processes. |
| DS4-11 |
| Access is defined on the user group and user setup records. |
| BR 3.1 |
| The system shall allow for the creation /modify of equipment, systems, and locations, as well as associated detailed information for each equipment record. |
| FR 6.4.12 |
| The system will be able to store work order numbers and corresponding information such as PM task number, job plans , description, type, equipment and location information, schedule start/finish date, actual start/finish date, close date, required parts, requestor information, labor/craft information, actual parts use, vendor information, and comments. |
| DS4-12 |
| BR 3.9 |
| The user shall be able to associate a job plan (task instruction) with each PM record. |
| FR 6.4.13 |
| The system will be able to maintain job plan descriptions. |
| DS4-13 |
| This is managed on the Job Plan record. |
| BR 4.41 |
| The system shall provide a means to generate work orders based on meter reading. |
| FR 6.4.14 |
| The system will be able to release PM work orders from meter readings or inspection results. |
| DS4-14 |
| PM Work Orders from Meter Readings are released automatically and are created when inspection results are submitted (requires Standard Work Order). |
| BR 4.11 |
| The system shall allow authorized users to generate work orders and requisitions. |
| FR 6.4.15 |
| The system will have the ability to generate work orders to track preventive and corrective maintenance for systems, equipment, and/or locations. |
| DS4-15 |
| PM work orders are generated from the Generate PM work orders screen.  Corrective Maintenance work orders are created manually on the work order screen. |
| BR 4.4 |
| The system shall allow authorized users to generate work orders from a preventive maintenance schedule. |
| FR 6.4.16 |
| The system will be able to generate preventive maintenance work orders from the PM schedule. |
| DS4-16 |
| PM work orders are generated from the Generate PM work orders screen |
| BR 3.3 |
| The system shall have the ability to create and maintain a parent – child hierarchy. |
| FR 6.4.17 |
| The system will be able to create and maintain parent-child work order hierarchies. |
| DS4-17 |
| Parent-child work orders are defined using Routes and PM Work Order Packages. |
| BR 4.6 |
| The system shall be able to associate various work order types and priorities to specific tasks or work requests. |
| FR 6.4.19 |
| The system will allow for the specification of the following work order types: |
| PMCAL - PM Calibration Work Order |
| BR - Breakdown Maintenance |
| BR - Breakdown Maintenance |
| PM - Preventive Maintenance |
| CM - Corrective Maintenance |
| RM - Routine Maintenance |
| NP - New Part |
| UP - Update Part |
| BR - Breakdown Maintenance |
| PM - Preventive Maintenance |
| CM - Corrective Maintenance. |
| RM - Routine Maintenance |
| NP - New Part |
| UP - Update Part |
| BR 3.1 |
| The system shall allow for the creation /modify of equipment, systems, and locations, as well as associated detailed information for each equipment record. |
| FR 6.4.20 |
| The system will be able to identify if a piece of equipment or location on a PM or work order is GMP if QA Oversight is triggered by FLEX and checked. |
| (Requirement no longer required.) |
| DS4-20 |
| BR 4.8 |
| The system shall be configurable to incorporate multiple work flows for various types of work and their associated processes |
| FR 6.4.21 |
| The system will be configurable to incorporate multiple work order flows for various types of work and their associated processes such as PM, work order requests, GMP, non-GMP, safety issues, and critical work orders. |
| DS4-21 |
| Workflow configuration is documented in the Application Configuration Specification |
| BR 4.9 |
| The system shall be capable of scheduling work by individual and/or trade. |
| FR 6.4.22 |
| The system will be able to schedule work and assign labor trade requirements. |
| DS4-22 |
| This can be done on the Scheduling screen, Job Plan screen and work order screen. |
| BR 1.7 |
| The system shall be able to store and attach electronic documents  throughout the application. |
| FR 6.4.23 |
| The system will allow creation and viewing of attached documents. |
| DS4-23 |
| Documents tab on multiple screens. |
| BR 1.4 |
| The system shall allow for routing functionality within the application. |
| FR 6.4.25 |
| The system will give authorized users the ability to notify personnel associated with work on a piece of equipment for which there may be impending safety concerns. |
| DS4-25 |
| EHS notification checkbox on the work order record. |
| BR 1.4 |
| The system shall allow for routing functionality within the application. |
| FR 6.4.26 |
| The system will notify members of the EHS (Environmental Health & Safety) group when work requests with safety implications are created. |
| DS4-26 |
| Inbox for EHS is defined.   Through a series of status authorizations. |
| BR 5.9 |
| The system shall be able to reserve material requirements to scheduled or unscheduled work orders and provide visibility to the reservation. |
| FR 6.5.2 |
| The system will allow authorized users to check the status of any CMMS generated parts request. |
| DS5-02 |
| The Purchase Order screen will detail the status of the request. |
| BR 5.2 |
| DELETED The system shall allow for the creation of maintenance repair operations (MRO) inventory items |
| FR 6.5.3 |
| The system will allow authorized users the ability to view, add, and modify item records. |
| DS5-03 |
| User group permissions control these rights. |
| BR 3.1 |
| The system shall allow for the creation /modify of equipment, systems, and locations, as well as associated detailed information for each equipment record. |
| FR 6.5.4 |
| System item records will include the incorporation of such information as item/part number, description, manufacturer, manufacturer item number, vendor, vendor part number, general ledger, reorder point, lead time, unit of issue, unit of purchase, and cost.  Functionality will be turned on at a future date if required |
| DS5-04 |
| This functionality will be defined within the Parts record.  Information is under the following tabs: |
| BR 5.2 |
| DELETED The system shall allow for the creation of maintenance repair operations (MRO) part numbers at a minimum of 20 characters long. |
| FR 6.5.5 |
| The system will be able to maintain part numbers up to 20 characters long. |
| DS5-05 |
| Defined in the database.   Technical Reference guide details 30 character limit. Screen Designer will provide the field details. |
| BR 5.3 |
| The system shall be able to maintain inventory items that are stocked in one or more storerooms. |
| FR 6.5.6 |
| The system will be capable of controlling inventory items by lot number and/or expiration date.  Functionality will be turned on at a future date if required |
| DS5-06 |
| Installation Parameter   is LOTNRG set to ‘P’.   P = ONLY Track By Lot. |
| BR 5.16 |
| The system shall have the capability to track parts as Equipment/repairable spares |
| FR 6.5.7 |
| The system will be able to monitor inventory items by serial number.  Functionality will be turned on at a future date if required |
| DS5-07 |
| Tracked By Asset functionality on the Equipment Record. |
| BR 5.3 |
| The system shall be able to maintain inventory items that are stocked in one or more storerooms. |
| FR 6.5.8 |
| The system will allow items to be stored in multiple bins. |
| DS5-08 |
| This is located on the Bins tab of the Parts record. |
| BR 5.18 |
| Bin information will show current stock level and last physical count date. Functionality will be turned on at a future date if required. |
| FR 6.5.9 |
| Bin information will show current stock level and last physical count date |
| DS5-09 |
| Lot expiration date is located on the Lot record.   Quantity is located on the Bins tab of the Part record.  Physical count date (Stock Date) is located on the Stores tab of the Parts |
| BR 5.19 |
| The system shall allow authorized users to override the automatic population of “Preferred Supplier” information on the “Stores” tab of Part records. |
| FR 6.5.22 |
| Administrator User Groups will be allowed to override the automatic population of “Preferred Supplier” field on the “Stores” tab of Part records through manual editing of the field’s contents. |
| DS5-22 |
| “Preferred Supplier” field on the “Stores” tab of Part records will be set to “Optional” for User Groups SYSADMIN, R5, and BUSADMIN, but otherwise will be set to “Protected”. |
| BR 5.3 |
| The system shall be able to maintain inventory items that are stocked in one or more storerooms. |
| FR 6.5.10 |
| The system will be able to maintain inventory information for multiple storerooms. |
| DS5-10 |
| This is located on the Stores tab of the Parts record. |
| BR 5.4 |
| The system shall be able to create and maintain main and satellite storerooms, and their associations. |
| BR 5.5 |
| The system shall be able to track multiple vendor and manufacturer information for each inventory item. |
| FR 6.5.12 |
| The system will be able to maintain multiple vendor and manufacturer listings for each inventory item record. |
| DS5-12 |
| This is located on the Supplier and Manufacturer tabs of the Part record. |
| BR 5.6 |
| The system shall be able to create and maintain rotating (repairable) equipment. |
| FR 6.5.13 |
| The system will be able to create and maintain rotating (repairable) equipment. |
| DS5-13 |
| This is maintained on the Record View tab of the equipment record and on the Record View and Repair Details tabs of the part record. |
| BR 5.7 |
| The system shall be able to issue/return inventory parts to Work Orders and Equipment |
| FR 6.5.14 |
| The system will allow the issuance, receipt, and return of parts to/from a work order, equipment. |
| DS5-14 |
| Parts Issues are managed on the Issue/Return screen.  This is also on the Stock tab of the Part record and the Parts tab of the work order record. |
| BR 5.8 |
| The system shall be able to associate parts to equipment, to a building, or to a defined area. |
| FR 6.5.15 |
| The system will be able to associate parts to equipment, system,  or location. |
| DS5-15 |
| Parts Associated tab for the Equipment, System, and Location. |
| BR 5.9 |
| The system shall be able to reserve material requirements to scheduled or unscheduled work orders and provide visibility to the reservation. |
| FR 6.5.16 |
| The system will be able to reserve materials requirements to scheduled or unscheduled work orders and provide visibility to the reservation. |
| DS5-16 |
| Reservation tab of the Part record.  Reservation tab of the Store record. |
| BR 5.10 |
| The system shall be able to provide inventory availability based on quantity in hand, quantity reserved, quantity awaiting repair, or quantity on order. |
| FR 6.5.17 |
| The system will be able to provide inventory availability based on quantity on hand, quantity reserved, and quantity on order. |
| DS5-17 |
| Reservation, Purchase Order tabs of the Part record.  Stock tab of the Store record. |
| BR 5.11 |
| The system shall provide authorized users the ability to run real-time part availability checks. |
| FR 6.5.18 |
| The system will provide the ability to run real-time material availability checks. |
| DS5-18 |
| Stock tab of the Store record. |
| BR 5.12 |
| The system shall allow authorized users to view the transaction history of items. |
| FR 6.5.19 |
| The system will allow the tracking of all inventory transactions, such as store-to-store and/or bin-to-bin transfers, and receipt of stocked, non-stocked, and special order items. |
| DS5-19 |
| Transactions tab of the Part record. |
| BR 5.13 |
| The system shall have the capability to do inventory cycle count. |
| FR 6.5.20 |
| The system will have the ability to perform a cycle count or physical inventory. |
| DS5-20 |
| Physical Inventory screen.  Custom Cycle Counting code to track inventory. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure |
| FR 6.6.1 |
| The system will be able to indicate a purchase unit of measure, which can be different from the consumption unit of measure. |
| DS6-01 |
| Suppliers tab of the Part Record |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure |
| FR 6.6.2 |
| The system will be able to indicate the conversion used between purchase unit of measure and consumption unit of measure. |
| DS6-02 |
| Suppliers tab of the Part Record |
| BR 6.1 |
| The system shall be capable of integrating with Oracle Purchasing application for the generation of vendor records, and purchase orders, as well as the receipt of materials, and viewing of purchase order balances. |
| FR 6.6.3 |
| The system will allow the viewing of vendor records containing relevant information such as vendor code, description, and other specific data. |
| DS6-03 |
| Supplier Screen contains this information related to Supplier |
| BR 6.1 |
| The system shall be capable of integrating with Oracle Purchasing application for the generation of vendor records, and purchase orders, as well as the receipt of materials, and viewing of purchase order balances. |
| FR 6.6.4 |
| The system will be able to prioritize vendors that are assigned to parts. |
| DS6-04 |
| Supplier and Stores tabs of the Part Record. |
| BR 6.1 |
| The system shall be capable of integrating with Oracle Purchasing application for the generation of vendor records, and purchase orders, as well as the receipt of materials, and viewing of purchase order balances. |
| FR 6.6.5 |
| The system will be able to associate multiple vendors to each part, with the ability to indicate a default vendor. |
| DS6-05 |
| Supplier tab of the Part Record. |
| BR 6.1 |
| The system shall be capable of integrating with Oracle Purchasing application for the generation of vendor records, and purchase orders, as well as the receipt of materials, and viewing of purchase order balances. |
| FR 6.6.6 |
| The system will be able to associate multiple shipping address information to each vendor record. |
| DS6-06 |
| Supplier Screen contains this information related to Supplier. |
| BR 8.1 |
| The system shall provide security to allow or disallow functionality on the system level, site level, and user level. |
| FR 6.7.1 |
| The system will have multi-level security to limit user access. |
| DS7-01 |
| User Groups, User Setup, Department Level Security, Store Security and Screen Designer. Workflow configuration is documented in the Application Configuration Specification (ITPD-37061) |
| BR 8.1 |
| The system shall provide security to allow or disallow functionality on the system level, site level, and user level. |
| FR 6.7.2 |
| The system will allow read-only access and be able to disallow access to tables and modules that are not part of the user functional job description. |
| DS7-01 |
| User Groups, User Setup, Department Level Security, Store Security and Screen Designer.  Workflow configuration is documented in the Application Configuration Specification (ITPD-37061) |
| BR 8.1 |
| The system shall provide security to allow or disallow functionality on the system level, site level, and user level. |
| FR 6.7.3 |
| Configuration of security access levels will include the ability to define security filters associated with users, roles, and workflows. |
| DS7-01 |
| User Groups, User Setup, Department Level Security, Store Security and Screen Designer.  Workflow configuration is documented in the Application Configuration Specification (ITPD-37061) |
| BR 8.1 |
| The system shall provide security to allow or disallow functionality on the system level, site level, and user level. |
| FR 6.7.4 |
| CMMS system administrators will be able to add/inactivate users, change user security settings, and add/inactivate reports within the system. |
| DS7-01 |
| User Groups, User Setup, Department Level Security, Store Security and Screen Designer.  Workflow configuration is documented in the Application Configuration Specification (ITPD-37061) |
| BR 8.1 |
| The system shall provide security to allow or disallow functionality on the system level, site level, and user level. |
| FR 6.7.6 |
| The system will allow the definition and configuration of user groups to differentiate security access levels. |
| DS7-01 |
| User Groups, User Setup, Department Level Security, Store Security and Screen Designer.  Workflow configuration is documented in the Application Configuration Specification (ITPD-37061) |
| BR 8.1 |
| The system shall provide security to allow or disallow functionality on the system level, site level, and user level. |
| FR 6.7.7 |
| The system will allow configuration of security access at the record/table level in regards to record inserts, updates, and deletes. |
| DS7-01 |
| User Groups, User Setup, Department Level Security, Store Security and Screen Designer.  Workflow configuration is documented in the Application Configuration Specification (ITPD-37061) |
| BR 8.1 |
| The system shall provide security to allow or disallow functionality on the system level, site level, and user level. |
| FR 6.7.9 |
| The system will allow configuration of a field to provide the last date and time a user has accessed the system. |
| DS13-01 |
| A field is available on the users screen which captures the last login datetime of a user. Flex SQL Trigger provides the logic to update this field. |
| BR 1.5 |
| The system shall allow for user profiles |
| FR 6.8.1 |
| The employee record in CMMS will include employee name, organization/location, and phone number. |
| DS8-01 |
| This is detailed in the Employee record. |
| BR 9.2 |
| The system will create requestor user accounts by integrating into active directory |
| FR 6.8.3 |
| The system will be capable of integrating with the authoritative source of employee and contractor data (i.e., Workday or Fieldglass) for access to corporate employee record information. |
| DS8-03 |
| There is an employee import into CMMS from the corporate authoritative source of employee and contractor data that runs nightly. |
| BR 9.1 |
| The system shall be able to track employees by trades |
| FR 6.8.4 |
| The system will be able to track labor by multiple occupation types/burden rates. |
| DS8-04 |
| This information is located on the Rates tab of the Trade record. |
| BR 10.1 |
| The system shall provide the ability to interface with active directory |
| FR 6.9.1 |
| The system will provide the ability to perform batch updates to CMMS employee data and cost center information from the authoritative source of employee and contractor data (i.e., Workday or Fieldglass). |
| DS9-01 |
| There is an employee and cost center imports into CMMS from the corporate authoritative source of employee and contractor data that runs nightly. |
| BR 10.1 |
| The system shall provide the ability to interface with active directory |
| ITPD-38444 |
| GFR-004 |
| The interface processes scheduled transmissions of Cost Code Data and delivers the packets to Infor |
| BR 10.1 |
| The system shall provide the ability to interface with active directory |
| ITPD-38444 GFR-005 |
| The interface processes scheduled transmissions of Employee Data and delivers the packets to Infor |
| ITPD-38450 DSG-01-05 |
| BR 3.1 |
| The system shall allow for the creation /modify of equipment, systems, and locations, as well as associated detailed information for each equipment record. |
| FR 6.9.4 |
| The requestor will be able to retrieve equipment and location information from the CMMS system. |
| DS9-04 |
| Available on Equipment, Systems, and Locations screens. |
| BR 9.2 |
| The system will create requestor user accounts by integrating into active directory |
| FR 6.9.5 |
| All Company A personnel (employees, temps, contractors, interns, etc.) will be able to submit a work request from any Company A workstation in CMMS without having to request an application user account. |
| DS9-05 |
| The system will allow any user with a Company A network account to submit a work request within CMMS.  A requestor account is created within CMMS when the user first signs into CMMS.  The user account is created through FLEX SQL. |
| BR 1.4 |
| The system shall allow for routing functionality within the application. |
| FR 6.9.6 |
| The system shall be designed such that work requests can be input into one queue based on user login and then automatically routed to the appropriate site for review and approval. |
| DS9-06 |
| User Groups, User Setup, Department Level Security, Store Security and Screen Designer.  Workflow configuration is documented in the Application Configuration Specification (ITPD-37061). |
| BR 4.2 |
| The system shall allow the Company A corporate intranet authorized user community to check the status of any work request. |
| FR 6.9.7 |
| The system shall be designed such that users can search work requests. |
| DS9-06 |
| User Groups, User Setup, Department Level Security, Store Security and Screen Designer.  Workflow configuration is documented in the Application Configuration Specification (ITPD-37061). |
| BR 4.1 |
| The system shall allow the Company A corporate intranet authorized user community to create work requests in the system. |
| FR 6.9.8 |
| The Requestor module shall consist of sections containing the following types of information: |
| Bldg/Floor |
| Phone Number |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure |
| FR 6.10.1 |
| The system will be able to indicate a purchase unit of measure, which can be different from the consumption unit of measure. |
| DS10-01 |
| Suppliers tab of the Part Record |
| BR 6.1 |
| The system shall be capable of integrating with Oracle Purchasing application for the generation of vendor records, and purchase orders, as well as the receipt of materials, and viewing of purchase order balances. |
| FR 6.10.6 |
| The system will be able to associate multiple addresses for each vendor record. |
| DS10-06 |
| Supplier Screen contains this information related to Supplier |
| BR 6.5 |
| The system shall have the capability to generate and track purchase orders approved from requisitions. |
| ITPD-38444 GFR-001 |
| BR 6.5 |
| The system shall have the capability to generate and track purchase orders approved from requisitions. |
| ITPD-38444 GFR-002 |
| The interface processes Purchase Order transmissions and delivers the packets to INFOR. |
| ITPD-38450 DSG01-02 |
| The interface consists of an INFOR application server than connects to an INFOR ION server. The ION server connects to the FUSION server that in turns connects to Oracle EBS. |
| BR 6.6 |
| The system shall have the capability to perform receipt transactions |
| ITPD-38444 GFR-003 |
| The interface processes Parts and Service Receipts transmissions and delivers the packets to Oracle EBS. |
| ITPD-38450 DSG01-03 |
| The interface consists of an INFOR application server than connects to an INFOR ION server. The ION server connects to the FUSION server that in turns connects to Oracle EBS. |
| BR 6.7 |
| The system shall have the capability to track invoice information and reconcile expenditures against purchase orders/receipts. |
| ITPD-38444 GFR-003 |
| The interface processes Parts and Service Receipts transmissions and delivers the packets to Oracle EBS. |
| ITPD-38450 DSG01-03 |
| The interface consists of an INFOR application server than connects to an INFOR ION server. The ION server connects to the FUSION server that in turns connects to Oracle EBS. |
| BR 5.15 |
| The system shall have the capability to reorder parts based on stocking parameters |
| N/A |
| N/A |
| N/A |
| N/A |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 REQ-001 |
| Each Requisition is processed as a unique data set. |
| ITPD-38450 DSG04-01 |
| Each PR is an XML with a unique ID. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 REQ-002 |
| The Requisition either passes all Fusion/Oracle validation and then is passed to EBS or it is returned to INFOR, via email, as an exception. |
| ITPD-38450 DSG04-02 |
| The PR is processed through standard EBS validation for PR and the complete PR is rejected and an exception email is sent to INFOR if any part of the PR fails. |
| BR 6.1 |
| The system shall be capable of integrating with Oracle Purchasing application for the generation of vendor records, and purchase orders, as well as the receipt of materials, and viewing of purchase order balances. |
| ITPD-38444 REQ-003 |
| The Requisition can be for parts and/or Service. |
| ITPD-38450 DSG04-03 |
| The standard BIIB functionality for PR allows for Parts and service to be included in a PR. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 PO-001 |
| Each PO Line is transmitted in a separate file that is part of a unique data set. |
| ITPD-38450 DSG04-04 |
| EBS generates a separate XML for each line of the PO and tags all lines with a unique number that ends with an “R”. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 REC-001 |
| Each Receipt is a unique data set. |
| ITPD-38450 DSG04-06 |
| Each Receipt is an XML with a unique ID starting with INF####. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 REC-002 |
| The Receipt either passes all Fusion/Oracle validation and then is passed to EBS or it is returned to INFOR, via email, as an exception. |
| ITPD-38450 DSG04-07 |
| The Receipt is processed through standard EBS validation for receipts and the complete receipt is rejected and an exception email is sent to INFOR if any part of the receipt fails. |
| BR 6.1 |
| The system shall be capable of integrating with Oracle Purchasing application for the generation of vendor records, and purchase orders, as well as the receipt of materials, and viewing of purchase order balances. |
| ITPD-38444 REC-003 |
| The Receipt can be for Parts or Service. |
| ITPD-38450 DSG04-08 |
| The standard BIIB functionality for Receipts allows for Parts and service to be included in a receipt. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 CCD-001 |
| Cost Code Data is transmitted from EBS as a unique data set. |
| ITPD-38450 DSG04-09 |
| A scheduled update of XMLs for Cost Codes changed since the last transmission is pushed to INFOR from EBS. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 CCD-002 |
| Cost Code Data transmissions contain add and change transaction types. |
| ITPD-38450 DSG04-10 |
| Each XML contains a transaction type of add or change. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 ED-001 |
| Employee Data is transmitted from Oracle HR as a unique data set. |
| ITPD-38450 DSG04-11 |
| A scheduled update of XMLs for Employee Data changed since the last transmission is pushed to INFOR form the HR Master Employee Data files. |
| BR 6.2 |
| The system shall have the capability to exchange pertinent procurement data with Oracle iProcure. |
| ITPD-38444 ED-002 |
| Employee Data transmissions contain add and change transaction types. |
| ITPD-38450 DSG04-12 |
| Each XML contains a transaction type of add or change. |
| BR 7.3 |
| The system shall provide authorized users with the ability to extract/export data from the system in an acceptable format such as Microsoft Excel. |
| N/A |
| N/A |
| N/A |
| N/A |
| BR 7.5 |
| The system shall allow for auto generated reports to be distributed via email |
| N/A |
| N/A |
| N/A |
| N/A |
| BR 4.7 |
| The system shall be able to modify/control equipment information based on user permissions. |
| N/A |
| N/A |
| N/A |
| N/A |
| BR 3.12 |
| The system shall be able to identify equipment records as instruments requiring calibration. |
| FR 6.3.11 |
| The system provides a checkbox identifying the record as an instrument on all equipment screens. |
| DS3-11 |
| The system has a "Measurement Device" checkbox that identifies equipment as an instrument in the Equipment screen. |
| BR 3.13 |
| The system shall be able to capture the status of an instrument. |
| FR 6.3.12 |
| The system provides a definable status field on the Equipment record. |
| DS3-12 |
| The system has an Equipment Status field to define the status of the equipment in the Equipment screen. |
| BR 3.14 |
| The system shall be able to identify the classification of an instrument. |
| FR 6.3.13 |
| The system provides a class field on the Equipment Record View tab for classification purposes. |
| DS3-13 |
| The system has an Equipment Class field to define the class of the equipment in the Equipment screen. |
| BR 3.15 |
| The system shall be able to store calibration data including calibration limits, ranges, units of measure, tolerances, test points, comments and standards used at an instrument level (Calibration Information). |
| FR 6.3.14 |
| The system provides for creating and storing calibration data by instrument or instrument category including calibration limits, ranges, units of measure, tolerances, test points, comments, and standards. |
| DS3-14 |
| The system provides a Categories screen that allows entry of calibration data, as well as specific test point data. |
| BR 3.16 |
| The system shall be able to designate differing units of measure for inputs vs. outputs in calibration testing. |
| FR 6.3.15 |
| The system provides separate units of measure for a test point and test point output. |
| DS3-15 |
| There are unit of measure fields for Test Points and Expected Outputs on the Category, Equipment, and Work Order screens. |
| BR 3.17 |
| The system shall be able to designate differing units of measure for individual test points within a set of test points on an instrument. |
| FR 6.3.16 |
| The system provides a specific unit of measure for each test point on the instrument. |
| DS3-16 |
| Each Test Point has a Test Point unit of measure on the Test Points tab of the Equipment, & Category screens as well as on the Calibration tab of the Work Order screen. |
| BR 3.18 |
| The system shall provide a mechanism for storing calibration information as a template for like instruments. |
| FR 6.3.17 |
| The system provides a Category code with calibration and test point data that can then be assigned to like instruments. |
| DS3-17 |
| The system provides a Categories screen where an instrument category can be defined including calibration and test point data and then automatically be associated to the Equipment. |
| BR 3.19 |
| The system shall be able to update calibration information as a batch for like instruments. |
| FR 6.3.18 |
| The system provides an Update Equipment function in the Categories program to update all equipment assigned to that category. |
| DS3-18 |
| Right clicking on the screen of the Calibration tab of Categories and clicking on Update Equipment, as well as clicking on the 'Update Equipment' link on the Test Points tab, updates the data on each of these tabs for associated equipment. |
| BR 3.20 |
| The system shall provide a mechanism for updating an instrument to a Measurement Device. |
| FR 6.3.19 |
| The system provides a field to update equipment as a Measurement Device on the Equipment screen. |
| DS3-19 |
| The Equipment Information Update Request process has a “Measurement Device” field. The associated instrument is updated upon the value selection and when the process is 'EQI-Closed'. |
| BR 3.21 |
| The system shall be able to track the location of an instrument and shall maintain a history of all location changes. |
| FR 6.3.20 |
| The system provides for a location in the Equipment structure that creates a history record in the Events tab each time the equipment location is changed. |
| DS3-20 |
| Each instrument can be linked to a location parent in structure. Each time this location is updated, the Events tab is populated with a record documenting the change. |
| BR 3.22 |
| The system shall be able to track the parent system of an instrument and shall maintain a history of all equipment hierarchy changes. |
| FR 6.3.21 |
| The system provides an equipment hierarchy on the Equipment Structure tab and captures hierarchy changes on the Events tab. |
| DS3-21 |
| The equipment hierarchy can be defined on the Structure tab of the Equipment screen. Each time the structure is updated, the Events tab is populated with a record documenting the change. |
| BR 3.23 |
| The system shall provide a method of tracking calibration standards as serialized equipment and as standardized inventory items. |
| FR 6.3.22 |
| The system provides for tracking of serialized equipment marked as calibration standards through the Part screen in the Record View tab. |
| DS3-22 |
| The Part screen has two checkboxes, “Track by Asset” and “Calibration Standard”.  Checking both allows tracking of serialized calibration standards. |
| BR 3.24 |
| The system shall have the ability to identify all calibration work performed with a given standard within a given time frame. (Reverse Traceability) |
| FR 6.3.23 |
| The system provides for reverse traceability for a defined date range using a defined standard. |
| DS3-23 |
| The system provides a "Reverse Traceability" report that shows all calibration work orders that have been calibrated using a specific Calibration Standard during a specified date range. |
| BR 3.25 |
| The system shall provide a mechanism for performing a criticality risk assessment on an instrument and capturing the results. |
| FR 6.3.24 |
| The system provides a method of performing a criticality assessment on an instrument based on a predefined set of questions. |
| DS3-24 |
| The system has an Instrument CRA process. Answering questions on a CRA survey accessible via a button "CRA/SIA Questions" on the Record View tab defines the instrument ‘Classification’ on the Record View tab. This Classification is applied to the associated instrument upon the status being changed to 'CRA/SIA-Closed'. |
| BR 3.26 |
| The system shall provide a mechanism for identifying the criticality of an instrument. |
| FR 6.3.25 |
| The system provides a Classification field with business rule capability to define the criticality of an instrument. |
| DS3-25 |
| The system provides the “Classification” field in the Record View of the Instrument CRA screen. Classification value is produced after going through the process. |
| BR 3.27 |
| The system shall provide a mechanism for attaching scanned documentation to an instrument record. |
| FR 6.3.26 |
| The system provides for scanned document attachment capability on Equipment records on the Documents tab. |
| DS3-26 |
| The Equipment screen all have a Documents tab where documents may be attached to each individual record. |
| BR 3.28 |
| The system shall provide a mechanism for communicating test point level instructions/comments and transferring this information to calibration work orders. |
| FR 6.3.27 |
| The system provides a comments field on each calibration test point that can be used for instructions/comments and will transfer to the calibration work order. |
| DS3-27 |
| The Equipment screen all have a test point comments field located on the Test Points tab. When a work order is created for an instrument, the test point comments will transfer to the work order. |
| BR 3.29 |
| The system shall have a mechanism for tracking the approval flow of the CRA Process outside of the instrument record (CRA Request) |
| FR 6.3.28 |
| The Instrument CRA screen is used to track the approval of an instrument update. |
| DS3-28 |
| The Instrument CRA screen is a classification process for instruments. The process automatically calculates the classification of an instrument based on answers to predefined questions. |
| BR 3.30 |
| The CRA Request mechanism shall include designation of Criticality Risk Assessment, Interval of calibration, range and tolerance information. |
| FR 6.3.29 |
| A CRA request process is provided to document the criticality classification, the interval of calibration, the range, and the tolerance of the instrument. A check box on the instrument will indicate the CRA has been completed. |
| DS3-29 |
| The Instrument CRA screen classifies the instrument based on answers to predefined questions. The CRA also allows users to enter Calibration Range, Calibration Tolerance, Document Attached?, and Proposed Interval data.  A ‘CRA Complete’ checkbox along with the ‘CRA Request No’ on the Equipment screen shows whether the instrument CRA is complete and the related request number is hyperlinked to the CRA request. |
| BR 3.31 |
| The system shall provide automatic updates of the Category field and updating the CRA assessment results into the appropriate equipment Category field. |
| FR 6.3.30 |
| The system provides capabilities through FLEX SQL configuration to update information on the equipment form based on the CRA assessment. |
| DS3-30 |
| The system provides the “Instrument Category” field on the Instrument CRA screen. When the Instrument CRA process becomes 'CRA-Effective', the “Category” field is updated on the associated instrument record along with the calibration details and test points. |
| BR 3.32 |
| The system shall allow for the association of instruments to parts records. |
| FR 6.3.31 |
| The system provides for the direct association of instruments to part records on the Equipment Record View tab in the Part Information section. |
| DS3-31 |
| The system has a Part field to associate a part to an instrument in the Equipment screen. |
| BR 3.33 |
| The system shall provide a mechanism for identifying an instrument as missing. |
| FR 6.3.32 |
| The system provides a means to mark an instrument as 'missing' by creating and using a defined supplemental status on the Record View tab. |
| DS3-32 |
| The system provides a Supplemental Status for an instrument as being ‘Missing’. The Equipment Information Update Request process updates the instrument's supplemental status upon the selection of that status and when the process is 'EQI-Closed'. |
| BR 4.12 |
| The system shall allow authorized users to generate calibration work orders from a preventive maintenance schedule. |
| FR 6.4.27 |
| The system provides authorized users a Generate WO program to generate PM work orders by work order type - 'PMCAL - Calibration' work orders. |
| DS4-27 |
| The system provides a Generate WOs screen where authorized users may generate PMCAL work order types. |
| BR 4.13 |
| The system shall be able to associate multiple PM schedules to an individual instrument. |
| FR 6.4.28 |
| The system allows multiple PM schedules to be associated to one instrument on the PM Schedules tab. |
| DS4-28 |
| On the PM Schedules tab of the Equipment screen, multiple PM Schedules can be associated for an instrument. |
| BR 4.14 |
| The system shall allow authorized users to generate calibration work orders for unscheduled or on-demand calibrations. |
| FR 6.4.29 |
| The system allows for the creation of unscheduled calibration work orders in the Work Order program. |
| DS4-29 |
| The Manufacturing/Engineering Work Request screen allows for the creation of an unscheduled calibration work order. The work order types include BR, CM, & RM for unscheduled calibration work orders. |
| BR 4.15 |
| The system shall provide a method of differentiating Calibration Work orders from general maintenance work orders. |
| FR 6.4.30 |
| The system provides a way to categorize work orders by using a UDF checkbox labeled as 'Calibration WO' on the Work Order Record View tab. |
| DS4-30 |
| On the Record View tab of the Work Order is a ‘Calibration WO’ checkbox that is automatically checked if calibration Test Points exist. It can also be manually checked if there are no test points, but the work order is a still a calibration work order. Also, the Manufacturing/Engineering Work Request allows the requestor to check the ‘Calibration Request’ checkbox indicating a request for calibration. |
| BR 4.16 |
| The system shall provide a method of differentiating calibration work orders performed by Company A technicians vs. performed by vendor calibration technicians. |
| FR 6.4.31 |
| The system provides a 'Supplier' field on the Record View of the work order that can house the calibration vendor code. |
| DS4-31 |
| When a work order status is set to “With Vendor”, the work order Supplier field becomes mandatory prior to saving the record. A Supplier code must be entered into this field, which will identify which vendor has the instrument for calibration. |
| BR 4.17 |
| The system shall provide a mechanism for capturing the name of the vendor performing the calibration. |
| FR 6.4.32 |
| The system provides a Supplier field on the work order that can indicate the calibration vendor. |
| DS4-32 |
| Once the Supplier field on the Work Order is filled-in, this will indicate which vendor has the instrument for calibration. |
| BR 4.18 |
| The system shall be able to identify which instruments have been sent off-site to external vendors. |
| FR 6.4.33 |
| The system provides a work order status field that will designate that the calibration work order has been sent to a vendor. (Status = "With Vendor") |
| DS4-33 |
| The System provides the work order status ‘With Vendor’ for scheduled and unscheduled calibration work orders. |
| BR 4.19 |
| The system shall provide a mechanism for vendor performed calibrations allowing users to attach scanned certificates. |
| FR 6.4.34 |
| The system provides Document Attachment capability so that vendor certificates may be attached to a calibration record. |
| DS4-34 |
| The Work Order program includes a Documents tab where vendor calibration certificates may be attached to a work order. |
| BR 4.20 |
| The system shall be able to capture calibration data and status per test point for As-Found conditions and As-Left conditions including failures and adjustments during the calibration process. |
| FR 6.4.35 |
| The system provides the ability to capture calibration data and status per test point for As-Found conditions and As-Left conditions including failures and adjustments during the calibration process. |
| DS4-35 |
| The Calibration tab of the Work Order allows entry of individual test point data, for both ‘As Found’ and ‘As Left’. A test point Status will be automatically determined by the system for each As Found and As Left Test Point. |
| BR 4.21 |
| The system shall be able to capture the overall calibration status of an instrument As-Found at the time of the calibration and As-Left after all test points have been completed including failures and adjustments. |
| FR 6.4.36 |
| The system provides the ability to capture the overall calibration status of an instrument As-Found at the time of the calibration and As-Left after all test points have been completed including failures and adjustments. |
| DS4-36 |
| The Calibration and Record View tabs of the Work Order have a 'Calibration Status' field that displays the overall work order calibration status based on As Found and As Left test point device readings. |
| BR 4.22 |
| The calibration technician must be able to see whether the entered calibration result is within or outside of the Calibration tolerance and the Adjustment tolerance. |
| FR 6.4.37 |
| The system provides the means for the calibration technician to view whether the entered calibration results are within or outside of the Calibration tolerance on the calibration work order. |
| DS4-37 |
| The Calibration tab of the Work Order displays an individual Test Point Status including ‘Pass’, ‘Fail’, ‘Adjust’, ‘Pass, adjust exists’, ‘Fail, adjust exists’. This status alerts the technician to whether the calibration result is within or outside of the test point calibration tolerance. |
| BR 4.23 |
| The system shall provide a mechanism for capturing all standards used during the calibration of an instrument. |
| FR 6.4.38 |
| The system provides the ability to capture the Standard used on a calibration work order. |
| DS4-38 |
| The Calibration tab of the Work Order screen includes a menu link called ‘Standards Used’ which allows capture of the standard used for the work order. |
| BR 4.24 |
| The system shall provide a method of verifying a standard is not past its expiration date before being used for calibration. |
| FR 6.4.39 |
| The system provides business rules to identify standards past their expiration dates. |
| DS4-39 |
| The system determines if the Standard is past its expiration data based on two scenarios. |
| BR 4.25 |
| The system must provide a work order status flow for the calibration work order. |
| FR 6.4.40 |
| The system provides a work order status flow for the calibration work order. |
| DS4-40 |
| The system provides a calibration work order status flow. |
| BR 4.26 |
| The calibration status shall exist independently of the work order status for the calibration work order. |
| FR 6.4.41 |
| The system provides a calibration status that is independent of the work order status. |
| DS4-41 |
| The Calibration and Record View tabs of the Work Order have a ‘Calibration Status’ field that displays calibration results. This status is independent of the Work Order status. |
| BR 4.27 |
| The system shall provide a mechanism for documenting adjustments made during the performance of the calibration. |
| FR 6.4.42 |
| The system provides As-Left information, test point comments and work order comments for calibration notes. |
| DS4-42 |
| The Calibration tab of the Work Order provides As-Left information and a comment section for each test point. The Work Order also has a Comments tab which can be used for calibration notes. |
| BR 4.28 |
| The system shall provide a method for documenting out of tolerance "RAR" reference record from supporting systems for failed calibrations on critical equipment for calibrations requiring an RAR. This field will require population for work orders requiring an RAR. |
| FR 6.4.43 |
| The system shall provide a field on the work order for capturing RAR Information (Trackwise #). Population of this field will be required via FLEX configuration for work orders requiring an RAR. |
| DS4-43 |
| If a calibration work order requires an RAR, the TRN field on the Work Order becomes mandatory when the Work Order is completed. |
| BR 4.29 |
| The system shall be able to capture the employee performing a calibration work order. |
| FR 6.4.44 |
| The system captures the e-Signature of the employee completing the work order. |
| DS4-44 |
| The system has been configured to capture the e-Signature of the user completing the work order. |
| BR 4.30 |
| The system shall be able to capture the time required to perform a calibration work order. |
| FR 6.4.45 |
| The system provides an "Hours Worked" field on the work order which captures the time worked by employee. |
| DS4-45 |
| The ‘Book Labor’ tab of the Work Order allows entry of the amount of hours worked on the work order. |
| BR 4.31 |
| The system shall provide a searchable database of unscheduled or scheduled calibration work order records. |
| FR 6.4.46 |
| The system provides a searchable database of work orders. Calibration work orders will have a checkbox to identify calibration work orders whether they are scheduled or unscheduled. |
| DS4-46 |
| The system provides a List View tab on the Work Order screen that allows users to filter for calibration work orders using columns such as 'Status', 'WO Type', and 'Calibration WO'. |
| BR 4.32 |
| The system shall provide a method of associating a calibration work order to a repair work order resulting from the performance of calibration activities. |
| FR 6.4.47 |
| The system provides a Parent/Child relationship with regard to Work Orders which can associate repair work orders to calibration work orders. |
| DS4-47 |
| On the Work Order Record View tab, there exists a Parent Work Order field which allows an association of a maintenance work order to a calibration work order. |
| BR 4.33 |
| The system shall allow for a grace period for the performance of a calibration work order after the work order is generated. This grace period is determined procedurally based on criticality and frequency of calibration. |
| FR 6.4.48 |
| The system provides a PM Due Date and PM Interval that defines the 'grace period' for each Calibration PM schedule. |
| DS4-48 |
| In the PM Schedule screen, the 'grace period' is defined as 'Duration' in the Record View and PM Due Date is defined as 'Due Date' of the instrument on the Equipment tab. |
| BR 4.34 |
| The system shall provide the capability of tracking schedule extensions for calibration work orders. |
| FR 6.4.49 |
| The system provides a work order status field that will designate that the calibration is working its way through the extension process. |
| DS4-49 |
| The system provides a work order status description that starts with ‘EXT’ that designates the extension process that the calibration work order is going through. |
| BR 4.35 |
| The system shall provide a method of identifying instruments having 3 or more sequential calibrations found out of tolerance. |
| FR 6.4.50 |
| The system provides reporting to identify instruments that have 3 or more consecutive failures. |
| DS4-50 |
| The system provides a "Out of Tolerance" report that displays instruments with 3 or more failures. |
| BR 4.36 |
| The system shall provide a method of displaying work instructions on a calibration work order. |
| FR 6.4.51 |
| The system provides comments text blocks for work instructions. |
| DS4-51 |
| The system provides a Job Plan Calibration Instructions tab where instructions are defined and moved to the work order activity comments block based on entry of a Job Plan on the Activity tab. |
| BR 4.37 |
| The system shall provide a method of indicating whether an instrument passed or failed calibration at the calibration work order level. |
| FR 6.4.52 |
| The system provides a calibration status to indicate whether the instrument passed or failed calibration. |
| DS4-52 |
| The system provides a work order calibration status determined by individual test point device readings As Found and As Left. The calibration statuses include: 'Incomplete'; 'Pass'; 'Fail'; 'Pass, Adjust Exists'; 'Pass, Fail Exists'. |
| BR 4.38 |
| The system shall provide a method of identifying a corrective work order as a calibration work order. |
| FR 6.4.53 |
| The system provides a checkbox indicating the work order includes calibration information. |
| DS4-53 |
| The system provides a “Calibration WO” checkbox on the Record View of the Work Order screen.  The checkbox is automatically checked if calibration Test Points exists for the associated instrument. It can also be manually checked if there are no test points and the work order becomes a calibration work order. |
| BR 4.39 |
| The system shall provide a mechanism for identifying different sets of test points for a particular category/instrument. |
| FR 6.4.54 |
| The system provides 'sets' at the test point level to separate groups of test points on scheduled calibrations. |
| DS4-54 |
| The Test Point tab of Categories allow for input of a ‘Set’ code for each Test Point on the category. This set code can be used to differentiate sets of test points for different PMs. |
| BR 4.40 |
| The system provides automated e-mail notification of equipment owner for out of tolerance calibration results upon completion of supervisor review of the order.  If the equipment owner is not populated, no notification will be sent. |
| FR 6.4.55 |
| The system provides an email notification tool that can be configured to send email notifications for out of tolerance calibrations. |
| DS4-55 |
| Email notifications will be sent to the instrument owner for all calibration work orders that fail calibration. |
| BR 5.17 |
| The system shall provide a mechanism for identifying a part as a Calibration Standard. |
| FR 6.5.21 |
| The system provides a checkbox on the Part record that is linked to the Equipment which identifies the part as a Calibration Standard. |
| DS5-21 |
| The system provides a “Calibration Standard” checkbox on the Record View tab of the Part screen. When this checkbox is selected, it identifies a part as a Calibration Standard. |
| BR 7.6 |
| The system shall provide access to historical calibration event records in a searchable format within the framework of the application. |
| FR 6.11.6 |
| The system provides a historical calibration event for each equipment record on the Events tab of Equipment. |
| DS11-06 |
| The system provides an Events tab on the Equipment screen that lists historical calibration activities. |
| BR 7.7 |
| The system shall provide access to historical calibration related records maintaining the relationship to the equipment/instrument record for migrated equipment. |
| FR 6.11.7 |
| The system will provide an additional tab linked to equipment records to show historical calibration data that occurred outside of CMMS. |
| DS11-07 |
| The Legacy System Instrument History Records tab displays legacy transactional calibration data for the associated instrument. |
| BR 7.8 |
| The system shall provide a report to access historical calibration measurement data records. |
| FR 6.11.8 |
| The system provides a Calibration History report which shows historical calibrations on each piece of equipment specified. |
| DS11-08 |
| The Legacy System Instrument History grid provides the 'Legacy System Instrument History Records' tab that lists all the historic calibration work orders for the selected equipment. Each calibration work order might also have access to measurement data. |
| BR 7.9 |
| The system shall provide a Calibration Work Order Report capturing a calibration event. |
| FR 6.11.9 |
| The system will provide a custom Calibration Work Order report that reports all calibration data for the specified equipment/instrument. |
| DS11-09 |
| BR 7.10 |
| The system shall provide a Confirmation of Calibration report displaying the last calibration performed on an instrument. |
| FR 6.11.10 |
| The system will provide a custom Confirmation of Calibration report that displays the last calibration performed on an instrument by Organization code. |
| DS11-10 |
| The system provides a “Confirmation of Calibration” report that displays the last calibration performed on an instrument. |
| BR 7.10 |
| The system shall provide a Confirmation of Calibration report displaying the last calibration performed on an instrument. |
| FR 6.11.10 |
| The system will provide a custom Confirmation of Calibration report that displays the last calibration performed on an instrument by Organization code. |
| DS11-18 |
| The Confirmation of Calibration screen will include checkboxes to specify inclusion of associated Classification information in reports. |
| BR 7.11 |
| The system shall provide a method of displaying all parents and/or children records for an instrument. (Hierarchy Report) |
| FR 6.11.11 |
| The system provides a report for equipment structure to show parent/child relationships. |
| DS11-11 |
| The system provides a “Equipment Hierarchies” report that displays the parent and child relationship of instruments. |
| BR 7.12 |
| The system shall provide a method of displaying all active or open calibration work orders. |
| FR 6.11.12 |
| The system will provide a list of all active calibration work orders based on the work order type, Calibration WO checkbox, and Status. |
| DS11-12 |
| The system provides a method of creating a dataspy that lists all calibration related work orders that are not in a ‘Closed’ status. |
| BR 7.13 |
| The system shall provide a report to forecast scheduled calibrations including calibration data. |
| FR 6.11.13 |
| The system provides a method of forecasting scheduled calibrations including calibration data: |
| Instrument ID |
| Ranges |
| BR 7.14 |
| The system shall provide a report displaying all devices calibrated using a specific standard over a specified period of time. (Reverse Traceability) |
| FR 6.11.14 |
| The system provides a reverse traceability feature by tying a part record, marked as a standard, to an instrument. |
| DS11-14 |
| The system provides a "Reverse Traceability" report that displays equipment that has been calibrated using a specific Calibration Standard during a specified date range. |
| BR 7.15 |
| The system shall provide a method of displaying all historical calibrations performed on an instrument. |
| FR 6.11.15 |
| The system provides event history of all calibrations performed on an instrument. |
| DS11-15 |
| The system provides an Events tab and Legacy System Instrument History Records tab on the Equipment instrument screen that lists historical calibration activities. |
| BR 11.4 |
| The System shall provide a method of storing and accessing legacy system transactional data that will not be migrated into the base application. |
| FR 6.12.4 |
| The system will provide access to legacy system transactional data searchable by instrument through a customized data grid. |
| DS12-4 |
| The Legacy System Instrument History grid displays transactional calibration data from the legacy systems. |
| BR 11.5 |
| Legacy information shall be accessible for migrated instruments and equipment as well as obsolete, non-migrated instruments and equipment. |
| FR 6.12.5 |
| This should be: The system will provide access to legacy system information via an equipment tab custom data grid for currently installed equipment and a custom transactional data grid for equipment that may or may not be in Infor 10. |
| DS12-5 |
| The Legacy System Instrument History Records tab on the Equipment screen displays legacy transactional data for the instrument selected. The system also provides the Legacy System Instrument History grid which displays legacy transactional calibration data. |
| BR 11.6 |
| Legacy information shall be sortable, searchable, filterable, and exportable. |
| FR 6.12.6 |
| Legacy transactional data will be located in a custom data grid which will be sortable, searchable, filterable and exportable to Excel. |
| DS12-6 |
| The Legacy System Instrument History grid displays transactional calibration data from the legacy systems. This grid acts the same as a standard CMMS grid where the data is sortable, searchable, filterable and exportable to Excel. |
| BR 3.34 |
| The system shall provide a means to store meter readings for equipment/instrument. |
| FR 6.3.33 |
| The system provides a meter tab to record PI meter readings both automatically and manually. The tab will provide options to update and track meter readings for each specific equipment/instrument. |
| DS3-33 |
| The system provides a “Meters” tab that displays the meter readings for an instrument/equipment. The meters tab provides the ability to see past meter readings, and new meter readings can be entered into the system. |
| BR 4.41 |
| The system shall provide a means to generate work orders based on meter reading. |
| FR 6.4.56 |
| The system provides a Meter-based PM schedule to generate PM work orders based on meter readings from the PI system. |
| DS4-56 |
| The system will generate PM work orders based on the desired meter reading interval denoted on the PM Schedule.  These work orders will be generated automatically once the “Meter Interval” on the PM Schedule has been reached. |
| BR 4.42 |
| The system shall provide a means to pull specific readings from the PI System. |
| FR 6.4.57 |
| The system provides a “Meter” tab on equipment and a “PI Alert Data” screen to extract reading points from the PI System. |
| DS4-57 |
| The meter tab provides readings for the equipment if the equipment is located on the “Meter Equipment” grid. |
| BR 4.43 |
| The system shall provide a means to store alert critical and extreme limits for equipment/instrument. |
| FR 6.4.58 |
| The system provides the “Aspects” tab on the Monitored Equipment screen to setup min/max values for alert critical and extreme limits for non-metered equipment/instrument. For metered equipment, the limits are set on the record view of the equipment screen. |
| DS4-58 |
| The system provides the “Aspects” tab on the Monitored Equipment screen.  This tab uses up to 4 distinct aspects assigned to a piece of equipment.  The system can assign MIN/MAX/LAST/AVG aspects, setting the min/max values for alert critical and extreme limits for non-metered equipment/instrument. |
| BR 4.44 |
| The system shall provide means to generate automated e-mail notification based on equipment alert criticals and extremes. |
| FR 6.4.59 |
| The system provides a place to setup automated e-mail notification when equipment alert critical/extremes are met or surpassed.  Automated email notification is handled through the existing “Alert Management” menu, using the “E-mail Alerts” tab. |
| DS4-59 |
| The system provides the “E-mail Alerts” tab on the Alert Management screen to set the work order and email alerts and delay frequencies.  A user is able to set up an email template and trigger an Email alert with desired data in the “Comments” tab by using this functionality.  Alerts can be triggered based on the aspects that are set using the Monitored Equipment screens. |
| BR 4.45 |
| The system shall provide means to generate work orders based on equipment alert extremes. |
| FR 6.4.60 |
| The system provides a mechanism to generate work orders if extremes are met or surpassed. Work order generation is handled through the existing “Alert Management” menu, using the “Work Order Alerts” tab. |
| DS4-60 |
| The system is able to generate CM work orders for alerts when the MIN/MAX aspect range values are surpassed. A user is able to set up a Work Order alert with desired data in the “Comments” tab by using the Alert Management functionality. Work Order alerts are triggered based on the equipment’s aspects and the incoming readings from the PI system. |
| BR 10.2 |
| The system shall provide the ability to interface with the PI System. |
| FR 6.9.9 |
| The system provides the “PI Meter Equipment” grid, Equipment “Meter” tab and “PI Alert Data” grid displaying instruments associated with PI tags and the related data. |
| DS9-9 |
| The system provides a "PI Alert Data" grid, which contains incoming readings from PI for aspects.  The grid pulls PI data if the equipment appears on the “Alert Equipment” tab, with all required information provided on the Monitored Equipment Screen.  Meter PI data appears on the “Meter” tab of the equipment, if the equipment appears on the “Meter Equipment” grid. |
| BR 7.16 |
| The system shall provide a method of printing calibration labels using the existing report functionality. |
| FR 6.11.16 |
| The system provides a method to print calibration labels using the built in Cognos reporting functions.  The report will be able to be generated automatically or manually. It must include the following data: |
| 1. Company A header |
| 2. Calibration Classification |
| BR 3.35 |
| The system shall provide a mechanism for performing a system impact assessment (SIA) on equipment and capturing the results. |
| FR 6.3.34 |
| The system provides a method of performing an SIA on equipment based on a predefined set of questions. |
| DS3-34 |
| The system has an Equipment SIA process. SIA requests will be accessible via the same screen as CRA requests (Equipment CRA/SIA Request). Answering questions on an SIA survey accessible via a button "CRA/SIA Questions" on the Record View tab defines the overall Equipment SIA on the Record View tab, as well as expanded SIA results on the System Impact Assessment Summary tab. |
| BR 3.36 |
| The system shall provide a mechanism for identifying the latest SIA performed on equipment. |
| FR 6.3.35 |
| The system provides a field on the equipment record that shows the latest CRA/SIA request. |
| DS3-35 |
| The system provides the SIA Request field on the Record View tab of the Equipment screen. The field value will be the latest CRA/SIA request number on the equipment. |
| BR 3.37 |
| DELETED |
| FR 6.3.36 |
| DELETED |
| DS3-36 |
| DELETED |
| BR 3.38 |
| The system shall provide a method to update multiple equipment on one CRA/SIA request. |
| FR 6.3.37 |
| The system provides an extra tab on the latest CRA/SIA Request screen to allow input of additional equipment on one request. |
| DS3-37 |
| The system provides the Additional Equipment tab on the CRA/SIA Request screen for users to input additional equipment of the same equipment Class. All changes to the request header equipment will cascade to the additional equipment. |
| BR 3.39 |
| The system shall provide a method to roll-down updates to the children of an equipment using the CRA/SIA Request screen. |
| FR 6.3.38 |
| DELETED Updates made to equipment from a SIA request will also roll-down to the SIA of all the children. |
| DS3-38 |
| DELETED The CRA/SIA Request screen has the ability to automatically update the SIA of children from an equipment that has completed a CRA/SIA request. |
| BR 3.39 |
| The system shall provide a method to roll-down updates to the children of an equipment using the CRA/SIA Request screen. |
| FR 6.3.52 |
| The system has the ability to determine the ‘Direct Impact or Child of Direct Impact’ status on a piece of equipment and roll-down to their children (if any), on the Equipment CRA/SIA Request screen. |
| DS3-52 |
| BR 3.39 |
| The system shall provide a method to roll-down updates to the children of an equipment using the CRA/SIA Request screen. |
| FR 6.3.53 |
| The system provides SIA request types on the Equipment CRA/SIA Request screen that will determine the SIA on a piece of equipment and roll-down to their children (if any) that are functional systems. |
| DS3-53 |
| BR 6.8 |
| The system shall allow users to manually change the status of purchase orders within CMMS. |
| FR 6.10.7 |
| The system will allow authorized user groups to update the status of a purchase order manually. |
| DS10-07 |
| PLNSCH or higher access user groups have the ability to update the “Status” of a purchase order. |
| BR 6.9 |
| The system shall allow all sites to order parts and in multiple currencies. |
| FR 6.10.8 |
| Authorized users from all sites have the ability to create a purchase requisition and set the currency that is not specific to the organization. |
| DS10-08 |
| PLNSCH or higher access user groups for all sites have the ability to set any currency type on a purchase requisition and be carried through to the purchase order. |
| BR 6.10 |
| The system should allow for proper pricing to be transferred to the purchase order for all units of measures. |
| FR 6.10.9 |
| The part record on a purchase order shall maintain the same quantity, price, and unit of measure as the purchase requisition it was generated from. |
| DS10-09 |
| The quantity, price, and unit of measure of a part on a purchase requisition will be transferred to the purchase order coming from Oracle EBS. |
| BR 10.3 |
| The system shall maintain updated active supplier information for suppliers that accept orders from Oracle EBS. |
| FR 6.9.10 |
| The system will provide the ability to perform batch updates to the Supplier screen with active supplier data from Oracle EBS. |
| DS9-10 |
| The system will automatically update data on the Supplier screen from Oracle EBS on a weekly basis. |
| BR 3.11 |
| The system shall provide a means to assess equipment for its criticality to business operations through the Reliability Ranking module. |
| FR 6.3.39 |
| The system will provide a means to assess the Reliability Ranking of the equipment to determine the critical nature of the equipment in terms of business operations. |
| DS3-39 |
| The system provides the Reliability Survey tab on the Equipment screen that calculates the Reliability Ranking Index and Score based on answering a set of questions. |
| BR 3.40 |
| The system shall be able to identify reviewers for revisions to preventive maintenance entities. |
| FR 6.3.40 |
| The system will provide reviewer fields on PM Entity screens for users to select the primary approvers for revisions. |
| DS3-40 |
| The system provides the PLNSCH Reviewer, SME Reviewer, and QA Reviewer (If Needed) fields on the Material List, PM Schedule, and Job Plan screens to assign approvers based on the selected Approval List. |
| BR 3.41 |
| The system shall be able to identify the reasoning for revisions to preventative maintenance entities. |
| FR 6.3.41 |
| The system will provide a free text field on PM Entity screens to enter the reason for revisions. |
| DS3-41 |
| The system provides the required Revision Reason field on the Material List, PM Schedule, Job Plan, and Route screens to perform revisions. |
| BR 3.42 |
| The system shall be able to put restrictions on initiators being approvers for GMP PM entity revisions with the exclusion of administrative changes. |
| FR 6.3.42 |
| The system will provide a means to restrict initiators from approving GMP PM Entity revisions that are not administrative changes. |
| DS3-42 |
| The system provides a flex that will restrict the initiator from approving GMP PM Entity revision that are not administrative changes. |
| BR 3.43 |
| The system shall be able to put the enforcement of QA Review for GMP PM Entity revisions with the exclusion of administrative changes. |
| FR 6.3.43 |
| The system will provide a means to enforce QA Review on GMP PM Entity revisions that are not administrative changes. |
| DS3-43 |
| The system provides a flex that will require the selection of QA Approval Lists for GMP PM Entity revisions that are not administrative changes. |
| BR 3.44 |
| The system shall be able to consolidate multiple processes for equipment onboarding. |
| FR 6.3.44 |
| The system will provide the Equipment Onboarding screen that incorporates equipment creation, CRA/SIA, Reliability Ranking, PM assessment, Alarm Classification, and optional upload. |
| DS3-44 |
| The system provides the Equipment Onboarding workflow process that will create/install equipment and generate work orders for equipment CRA/SIA, Reliability Ranking, Upload, Alarm Classification, and Calibration. |
| BR 3.45 |
| The system shall provide a process to install or retire equipment |
| FR 6.3.45 |
| The system will provide the Equipment Install/Retire Request screen to install or retire equipment. |
| DS3-45 |
| The system provides the Equipment Install/Retire Request work flow process to install or retire equipment and denotes Non-dependent Children, Parent Equipment, and Open Work Orders on the equipment. |
| BR 3.46 |
| The system shall be able to by-pass QA Review on non-GMP Equipment CRA/SIA Requests for equipment in the TD, RESEARCH, and CAM GEF departments. |
| FR 6.3.46 |
| The system will provide a means to by-pass QA review for certain equipment on Equipment CRA/SIA Request |
| DS3-46 |
| The system provides a flex to by-pass QA review of Equipment CRA/SIA Request, if the equipment is in the CAM TD, CAM RESEARCH, or CAM GEF Department and contains BCEPS on CRA Classification and/or has a SIA Classification of No Impact. |
| BR 3.47 |
| The system shall be able to by-pass review on calibration work orders that does not contain critical in the classification. |
| FR 6.3.47 |
| The system will provide a means to by-pass review and go straight to close status on scheduled and unscheduled calibration work orders. |
| DS3-47 |
| The system provides a database trigger to go from released to closed status on scheduled and unscheduled calibration work orders if it has CRA Classification that is not either Critical, SPU-Critical, or Single Use-Critical. |
| BR 4.46 |
| The system shall be able to by-pass planning when creating an unscheduled work order. |
| FR 6.4.61 |
| The system will provide a means to by-pass PLNSCH review (Planning) and go straight to Released status when creating unscheduled work orders. |
| DS4-61 |
| The system provides the ability to by-pass planning and in released status when creating an unscheduled work order if the Trade, Estimated Hours, People Required and Assigned To (must be requestor) fields are filled in. |
| BR 3.48 |
| The system shall provide a means to automatically update equipment information on PM Schedules when the equipment is being updated. |
| FR 6.3.48 |
| The system will provide a flex that will update fields on the Equipment tab of the PM Schedules screen after updating fields on the Equipment screen. |
| DS3-48 |
| The System will provide a flex that will update the Location, Department, Dormant Start, Dormant End, Date Deactivated fields in the Equipment tab of the PM Schedule screen when records are being updated on the Equipment screen. |
| BR 4.47 |
| The system shall be able to enforce a requirement to populate a value in the Supervisor field for DEN and SOL work orders. |
| FR 6.4.62 |
| The system will provide a flex that will make the Supervisor field a mandatory requirement for DEN and SOL work orders when the WO is saved to the Released, Review, and Closed Statuses. |
| DS4-62 |
| The system will provide a flex that will require a selection in the Supervisor field of the Work Order screen only to process DEN and SOL work orders and not during WO creation. |
| BR 3.49 |
| The system shall be able to hide the “Assigned To” field on PM Schedules and Equipment screens. |
| FR 6.3.49 |
| The system will be able to hide the “Assigned To” field in the PM Schedule and Equipment screen. |
| DS3-49 |
| The system will have the ability to hide the “Assigned To” field in the Equipment tab of the PM Schedule screen and PM Schedules tab of the Equipment screen using Screen Designer. |
| BR 3.50 |
| The system shall be able to detect if a PM Entity is GMP or Non-GMP, based on the status of the related equipment. |
| FR 6.3.50 |
| The system shall be able to detect if a PM Entity is GMP or Non-GMP from the status of the related equipment which determines the selection of approvals lists for PM Entity revisions. |
| DS3-50 |
| The system will provide an additional check through flex to determine if a PM Entity is GMP or Non-GMP by the related equipment status to enforce or allow the correct selection of approval list in a PM Entity Revision. |
| BR 7.17 |
| The system shall provide a means to lookup open revisions on PM Entities. |
| FR 6.11.17 |
| The system will provide a grid showing all active open revisions on PM Schedules, Job Plans. Material Lists, and Routes. |
| DS11-17 |
| The system provides the “Active Revisions” grid showing all active open PM Schedule, Job Plan, Material List, and Route revisions and revision approval details. |
| BR 7.18 |
| A summary change report shall be generated with Current equipment settings and BOE settings. |
| FR 6.11.19 |
| An Equipment Change Summary report shall be generated with Current equipment settings and BOE settings. |
| DS11-19 |
| Advanced Reporting supports generation of Engineering Changeover reports.  Reference ITPD-129666, "ECDB Technical Design Document with Business Workflows", Section 11.1 "(ECR) IEL Request Work order Report" for the report specification. |
| BR 7.19 |
| An BOE Summary Report that will show BOE header information, BOE equipment and BOE Settings. |
| FR 6.11.20 |
| A BOE Summary Report will show BOE header information, BOE equipment and BOE Settings. |
| DS11-19 |
| Advanced Reporting supports generation of Engineering Changeover reports.  Reference ITPD-129666, "ECDB Technical Design Document with Business Workflows", Section 11.3 "BOE Report" for the report specification. |
| BR 7.20 |
| An Revision Change Detail Report for BOEs will show changes between revisions from the record view, BOE equipment, and BOE equipment Settings |
| FR 6.11.21 |
| An Revision Change Detail Report for BOEs will show changes between revisions from the record view, BOE equipment, and BOE equipment Settings |
| DS11-19 |
| Advanced Reporting supports generation of Engineering Changeover reports. Reference ITPD-129666, "ECDB Technical Design Document with Business Workflows", Section 11.12"BOE Revision Report" for the report specification. |
| BR 7.21 |
| An Equipment Change Summary Report that shows IEL record view information, incoming equipment list with calibration overdue status and dormancy information,settings comparison to the BOE, excecutable wokrorder info , inital process settings , and esigniture section. |
| FR 6.11.22 |
| An Equipment Change Summary Report will show IEL record view information, incoming equipment list with calibration overdue status and dormancy information,settings comparison to the BOE, excecutable wokrorder info , inital process settings , and esigniture section. |
| DS11-19 |
| Advanced Reporting supports generation of Engineering Changeover reports.  Reference ITPD-129666, "ECDB Technical Design Document with Business Workflows", Section 11.1 "(ECR) IEL Request Work order Report" for the report specification. |
| BR 4.48 |
| DELETED The system at version 11.2 patch 201802 shall provide an average performance increase of at least 10% from 17-40 seconds when loading 100-200 checklist items on work orders. |
| N/A |
| N/A |
| N/A |
| N/A |
| BR 4.49 |
| The system shall allow authorized users to use checklists to track work performed on work orders. |
| FR 6.4.64 |
| The system will be able to display the correct completion status of the checklist on a work order, when any type of checklist is used. |
| DS4-64 |
| This is managed through FLEX SQL that checks the ‘Checklist/Activity Completed’ checkbox on the Activities tab of the work order, and fills in the correct metadata values in the ‘Work Status’ field under the ‘Work Summary’ section of the work order Record View.t |
| BR 4.50 |
| The system shall provide authorized users a method to generate and review audit trail reports of work orders. |
| FR 6.4.65 |
| The system will be able to pass records of changes made to information on the screen of a work order of any type to an attached ‘Audit Trail Review’ tab. The system will then compile and display the records in an audit trail report in the ‘Audit Trail Review’ tab. |
| DS4-65 |
| This is managed through creation of a custom tab 'Audit Trail Review' on screens for any type of work order ('Work Orders', 'Extensions', 'Equipment CRA/SIA Request', and 'Alarm Classification'), as well as installation of four Extensibility Framework adds ('WSJACL', 'WSJCRA', 'WSJOBE', and 'WSJOBW') and running three SQL scripts ('function\_BG\_TRIMHTML\_DTA', 'Indexes', and 'URL\_Parameters') against the CMMS database. |
| BR 3.51 |
| The system shall provide a mechanism to assess the classification of alarm records and create alarm records. |
| FR 6.3.54 |
| The system provides an “Alarm Classification” screen which can be used to create alarm records and perform an alarm classification assessment. |
| DS3-54 |
| The “Alarm Classification” screen provides a classification process for alarm instruments. The process automatically calculates the classification of an instrument based on answers to predefined questions. The request will then follow an approval process which involves SME and QA approvals, depending on the GMP status of the alarm. |
| BR 3.52 |
| The system shall provide a means to show alarm records with alarm classification values. |
| FR 6.3.55 |
| The system provides an “Alarms” screen which displays alarm records with alarm classification values. |
| DS3-55 |
| The “Alarms” screen will contain all of the information about the alarm instrument such as the Alarm Classification, Assessment Request, Alarm Tag, Class, Department, Status, Parent, and Location of the alarm instrument. |
| BR 3.53 |
| The system shall provide a means to upload Alarm Classification requests. |
| FR 6.3.56 |
| The system provides a means to upload Alarm Classification data for the respective request/multiple requests at a time. |
| DS3-56 |
| There will be an Alarm template in myCIMS, where users can download the template for use. The template will be used in conjunction with the Upload Utility to upload Alarm Classification request data into the system. |
| BR 10.4 |
| The system shall maintain an outbound Equipment publication service. |
| FR 6.9.2 |
| The system will publish records indicating changes to Equipment master attributes for select Equipment to a database staging table, for external systems to read. |
| DS9-02 |
| Any insert/update/delete operation on the database tables for select Equipment records will generate a new record in a database staging table. Database views will also exist to contain updated field values, for external systems to read. |
| BR 10.4 |
| The system shall maintain an outbound Equipment publication service. |
| FR 6.9.3 |
| The system will query for PM or PMCAL Work Orders that are Overdue each day at midnight Organization time. The system will then publish an Overdue status for select Equipment that are impacted to a database staging table, for external systems to read. Overdue status is defined as an open Work Order not equal to 3RVW, 3QA, 3UPD, and Due Date less than the date at the location of the Equipment on the Work Order. |
| DS9-03 |
| A database job will be configured to execute a procedure at midnight Organization time for each supported time zone, in order to determine which PM or PMCAL Work Orders become Overdue, and to publish Overdue status to a database staging table for select Equipment that are impacted in that Organization. |
| BR 10.4 |
| The system shall maintain an outbound Equipment publication service. |
| FR 6.9.13 |
| The system will determine if no other Overdue maintenance exists against an Equipment or its Child Equipment, once a PM or PMCAL Work Order completes for an Equipment deemed Overdue. If it finds none, the system will publish a Not Overdue status for select Equipment, as well as for any select Parent Equipment that have no other Child Equipment in an Overdue status, to a database staging table, for external systems to read. Completed status is defined as when the Work Order reaches a status of 3RVW, 3QA, 3UPD or a system status of C. Overdue status is defined as having an open PM or PMCAL Work Order against the Equipment not equal to 3RVW, 3QA, 3UPD, and Due Date less than the date at the location of the Equipment. |
| DS9-02 |
| Any insert/update/delete operation on the database tables for select Equipment records will generate a new record in a database staging table. Database views will also exist to contain updated field values, for external systems to read. |
| BR 10.4 |
| The system shall maintain an outbound Equipment publication service. |
| FR 6.9.14 |
| The system will determine if an Equipment structure change causes any Equipment to become Overdue or Not Overdue. Overdue status rolls up to all Parent Equipment. Not Overdue status rolls up to all Parent Equipment with no other Overdue Child Equipment. The system will publish an Overdue or Not Overdue status for select Equipment to a database staging table, for external systems to read. Overdue status is defined as having an open PM or PMCAL Work Order against the Equipment not equal to 3RVW, 3QA, 3UPD, and Due Date less than the date at the location of the Equipment. |
| DS9-02 |
| Any insert/update/delete operation on the database tables for select Equipment records will generate a new record in a database staging table. Database views will also exist to contain updated field values, for external systems to read. |
| BR 10.4 |
| The system shall maintain an outbound Equipment publication service. |
| FR 6.9.15 |
| A “Broadcast Changes” checkbox, editable by Administrator User Groups, will be available on the Equipment screen to select Equipment for which status and Equipment master attribute changes will be recorded onto a database staging table, for external systems to read. |
| DS9-13 |
| Database triggers will be responsible for signaling changes in Equipment master attributes, including custom field values. |
| BR 10.5 |
| The system shall provide the ability to interface with the Advanced Scheduler application. |
| FR 6.9.16 |
| Database Views will be installed to stage data for the Advanced Scheduler application to pull. The Views will display general Work Order data for select Work Orders, Trades associated with Activities on each Work Order, sum of Estimated Hours of each Trade per Work Order, and sum total of all Estimated Hours per Work Order. |
| DS9-14 |
| View AS\_WORK\_VW will pull Work Order information from database table R5EVENTS, including Work Order code and associated Status, Start Date, Due Date, Date Completed, and Work Order Class. Work Order data will be pulled by the View if the associated Work Order Class is ‘AS-SCHED’. |
| BR 3.54 |
| Protected “PM Due” and “PMCAL Due” indicators will be made available on the Equipment screen to indicate whether an Equipment is Overdue for Preventative Maintenance or Calibration, respectively. |
| FR 6.3.63 |
| Protected “PM Due” and “PMCAL Due” checkboxes will be added to the Equipment screen as indicators of Preventative Maintenance or Calibration Overdue status of corresponding Equipment. Overdue status is defined as having an open PM or PMCAL Work Order against the Equipment not equal to 3RVW, 3QA, 3UPD, and Due Date less than the date at the location of the Equipment. |
| DS3-58 |
| A flex trigger will perform Overdue and Not Overdue calculations in response to an Equipment move. |
| BR 3.55 |
| The system shall allow change in to be completed for different areas or zones of manufacturing at different times. |
| FR 6.3.64 |
| BOE will allow Equipment to be categorized by Zone and Area. |
| DS3-60 |
| Equipment List tab on the BOE screen will support columns to specify Zone and Area associated with Equipment. |
| BR 3.56 |
| The system shall be able to store process settings of the equipment. |
| FR 6.1.18 |
| A settings tab on Equipment records will detail existing attribute settings relevant to the Equipment record. |
| DS1-17 |
| User Defined Screen will provide a tab supporting attribute settings on Equipment records |
| BR 3.57 |
| The system shall be able to route and track revisions to the BOE and attributes. |
| FR 6.1.19 |
| BOE will be revision controlled and support a review status prior to approval. |
| DS1-16 |
| BOE records will be configured as a revision controlled record via the Revision Controlled eRecords Setup screen. |
| BR 3.58 |
| The system shall be able to record the reasoning for revisions to BOEs or equipment attributes. |
| FR 6.3.65 |
| Revision Reason field will capture justification for revision. |
| DS3-61 |
| Revision Reason field will capture justification for revision. The field is confugured per ITPD-129666 - CMMS ECDB Detailed Design Specification - Engineering Configuration Database |
| BR 3.59 |
| The system shall support the ability to perform bulk data uploads of Attributes, BOE Equipment and BOE Settings. |
| FR 6.3.66 |
| The CMMS Import Utility application will support bulk data upload for BOE, attributes, and attribute settings. |
| DS3-62 |
| The CMMS Import Utility application will support bulk data upload for the following sheets: |
| BR 3.60 |
| The system shall display whether each piece of equipment selected for a campaign is dormant or is currently due for PM. |
| FR 6.1.13 |
| The system enables authorized users to generate Bill of Equipment records detailing lists of Equipment validated for use in manufacturing a specific product and the status of the Equipment; as well as to associate the Equipment on the BOE with the attribute settings required by the BOE. |
| DS1-13 |
| User Defined Screens display BOE Equipment and required attribute settings. |
| BR 3.61 |
| All current process settings for a piece of equipment shall be able to be viewed. |
| FR 6.1.14 |
| A settings tab on Equipment records will detail existing attribute settings relevant to the Equipment record. |
| DS1-14 |
| User Defined Screen supports attribute settings on Equipment records |
| BR 3.62 |
| A record of initial process settings shall be able to be viewed in the change request. |
| FR 6.3.67 |
| IEL will include a tab detailing a comparison between initial (Equipment) settings and BOE settings. |
| DS9-17 |
| User Defined Screen supports generation of IEL via selection of Equipment from a BOE. |
| BR 3.63 |
| A record of date and time of implementation of new process settings shall be able to be viewed in the Equipment Change Summary report. |
| FR 6.3.68 |
| The IEL will provide a timestamp for new process settings that have been implemented. |
| DS9-18 |
| IEL User Defined Screen will support a field for timestamp of process setting updates. |
| BR 3.64 |
| The system shall allow a user to change process settings on a piece of equipment outside of campaign changeover. |
| FR 6.3.69 |
| A settings tab on Equipment records will detail existing attribute settings relevant to the Equipment record. |
| DS1-14 |
| User Defined Screen supports attribute settings on BOE. |
| BR 4.51 |
| The system shall compare the current process settings of each piece of equipment selected in the IEL with the incoming process settings for the new campaign. |
| FR 6.4.68 |
| A settings comparison tab is available on the Equipment Change Request screen. |
| DS4-70 |
| The IEL screen logic is implemented via Extensible Framework. |
| BR 4.52 |
| The system shall generate work orders to change any current process settings which differ from the incoming campaign’s process settings. |
| FR 6.4.69 |
| The system will generate a Work Order for each Zone under the Equipment Change Request. The system will also generate Routine Maintenace Work Orders against each Equipment on the IEL, as children to the respective Zone Work Orders. The Routine Maintenance Work Orders will include checklists to change any current process settings which differ from the incoming campaign’s process settings; and will be organized into Activities on the Work Order. corresponding to the Trade of the respective settings being changed. |
| DS4-71 |
| Flex triggers are implemented generate Work Orders on approval of Equipment Change Requests. |
| BR 4.53 |
| The system shall generate work orders to change any current process settings to N/A in cases where those attributes are not specified for the incoming campaign. |
| FR 6.4.70 |
| If the Equipment Change Request does not specify the value for a process setting that exists on an Equipment included in the IEL, then the ECR will include work orders to change the value of those unspecified settings to N/A on the Equipment record. |
| DS4-71 |
| Flex triggers are implemented generate Work Orders on approval of Equipment Change Requests. |
| BR 4.54 |
| The system shall not generate work orders in cases where the current equipment process setting matches that of the incoming campaign. |
| FR 6.4.71 |
| Equipment Change Requests will not generate Work Orders to change process settings when the value of the setting on the Equipment included in the IEL matches that setting value on the BOE. |
| DS4-71 |
| Flex triggers are implemented generate Work Orders on approval of Equipment Change Requests. |
| BR 4.55 |
| A single work order shall be generated for each piece of equipment for each trade and zone, with a checklist of attributes to be updated. The checklist notes shall be pre-populated with the new value and old value. |
| FR 6.4.72 |
| Upon approval of the Equipment Change Request, a single work order shall be generated for each piece of equipment for each trade and zone, with a checklist of attributes to be updated per the associated BOE. The checklist notes shall be pre-populated with the new value and old values. |
| If a checklist item for update of a Process Setting is left unchecked when a Work Order is completed, the old value will remain in the Process Settings of the Equipment. |
| BR 4.56 |
| System shall provide the ability to complete WO based on checked process setting status. |
| FR 6.4.73 |
| The system automatically updates Equipment attributes when respective checklist items are marked as successfully completed. Otherwise the system does not update the Equipment. |
| Once a checklist item for update of a Process Setting is checked and the Work Order is closed, the system will apply the new value to the Process Settings of the Equipment. |
| BR 4.57 |
| System shall provide the ability to complete WO based on unchecked process setting status. |
| FR 6.4.73 |
| The system automatically updates Equipment attributes when respective checklist items are marked as successfully completed. Otherwise the system does not update the Equipment. |
| Once a checklist item for update of a Process Setting is checked and the Work Order is closed, the system will apply the new value to the Process Settings of the Equipment. |
| BR 4.58 |
| The system will assign Work Orders to the trade that is assigned to the associated parameters (BOE Settings). |
| FR 6.4.74 |
| BOE will support association of attribute settings with specific trades against which the Work Orders to update the attributes will be generated. |
| DS4-71 |
| Flex triggers are implemented generate Work Orders on approval of Equipment Change Requests. |
| BR 4.51 |
| DELETED The system shall reject outbound purchase requisitions from organization Denmark. |
| FR 6.4.66 |
| DELETED The system will prevent users from submitting purchase requisitions for organization Denmark to Oracle from CMMS. |
| DS4-66 |
| The system will provide a Flex SQL trigger to restrict attempts to submit requisitions to Oracle from CMMS from the Requisitions screen if Organization is set to DEN. |