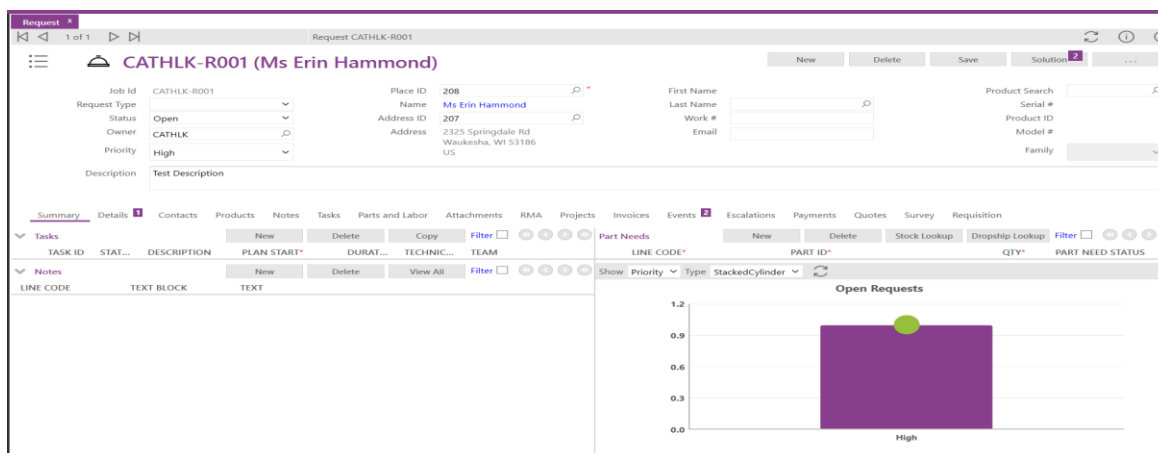


FSM configuration Training

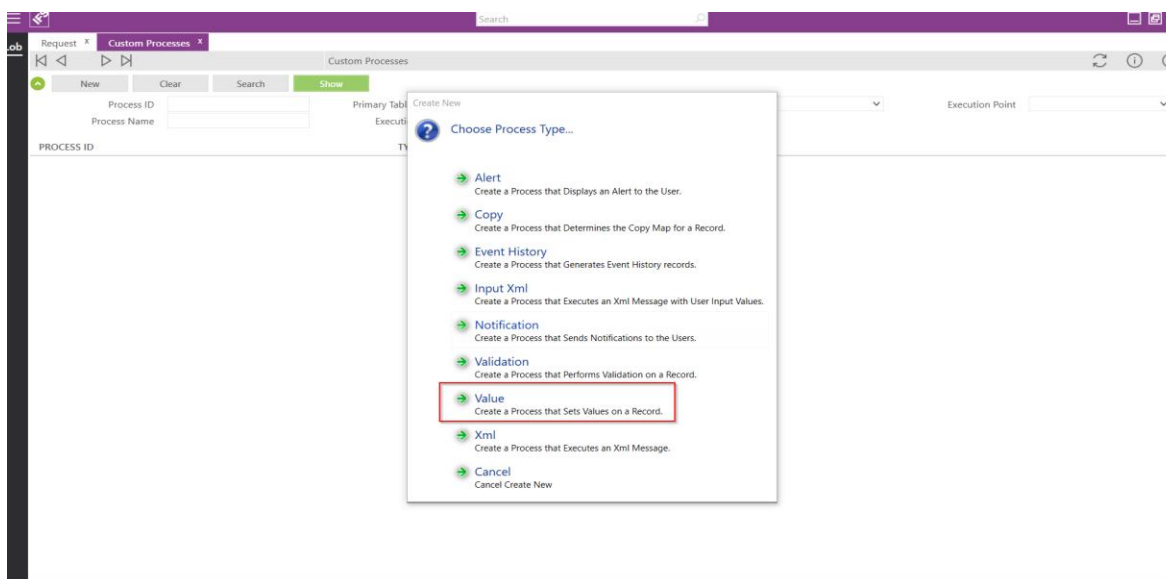
A). BUSINESS RULES.

Business Requirement: Change the Description of Request based on changes on Status of request. (when user change the status to “Investigate” Description need to be changed to “Investigate”)

1). Create your own request.



2). Create Custom Process (Design a Value type Business rule)



Request x Custom Processes x

Custom Processes CATHLK-VAL-REQUEST

CATHLK-VAL-REQUEST

Process ID: CATHLK-VAL-REQUEST
 Process Name: CATHLK-VAL-REQUEST
 Process Desc: Change Request's Description
 Primary Table Name: REQUEST
 Comment:

Execution Point: Before Insert Or Update
 Execution Sequence: 10
 Execution Type: All Rules All Values Match

Transactional: ☒
 Effective Date:
 Group:
 Process Type: Value
 Synchronous: ☐
 Active: ☒

Process Parameters

PARAM SEQUENCE*	EXECUTION SEQUENCE*	PERFORM NAME TO CALL	TABLE NAME TO SET	COLUMN NAME TO SET

3). Refresh Cache . Retrieve the newly created Business process from Business rule window . (Use Custom Process name to search.)

Request x Custom Processes x Business Rules x

Business Rules CATHLK-VAL-REQUEST

CATHLK-VAL-REQUEST

Process ID: CATHLK-VAL-REQUEST
 Name: CATHLK-VAL-REQUEST
 Description: Change Request's Description
 Comment:

Active: ☒
 Associated Table: REQUEST
 Execution Sequence: 10

Execution Point: Before Insert Or Update
 Execution Type: All Rules All Values Match
 Process Type: Value

Category: Custom
 Group:
 Watching: ☐
 Watching All: ☐

Rules Process Output

RULE ID	SEARCH O...	RULE NAME*	NOTE	ACTI...	ACCESS GROUP	GROUP	AREA	INTEGRATION...	MODIFIED...	MODIFIED

Rule Input

TABLE NAME	COLUMN NAME	USE ORIGINAL VA...	USE EXPRESSION*	INPUT...	CREATED BY	CREATED	MODIFIED BY	MODIFIED

4). Create rule id and rule input .

Request x Custom Processes x Business Rules x

Business Rules CATHLK-VAL-REQUEST

CATHLK-VAL-REQUEST

Process ID: CATHLK-VAL-REQUEST
 Name: CATHLK-VAL-REQUEST
 Description: Change Request's Description
 Comment:

Active: ☒
 Associated Table: REQUEST
 Execution Sequence: 10

Execution Point: Before Insert Or Update
 Execution Type: All Rules All Values Match
 Process Type: Value

Category: Custom
 Group:
 Watching: ☐
 Watching All: ☐

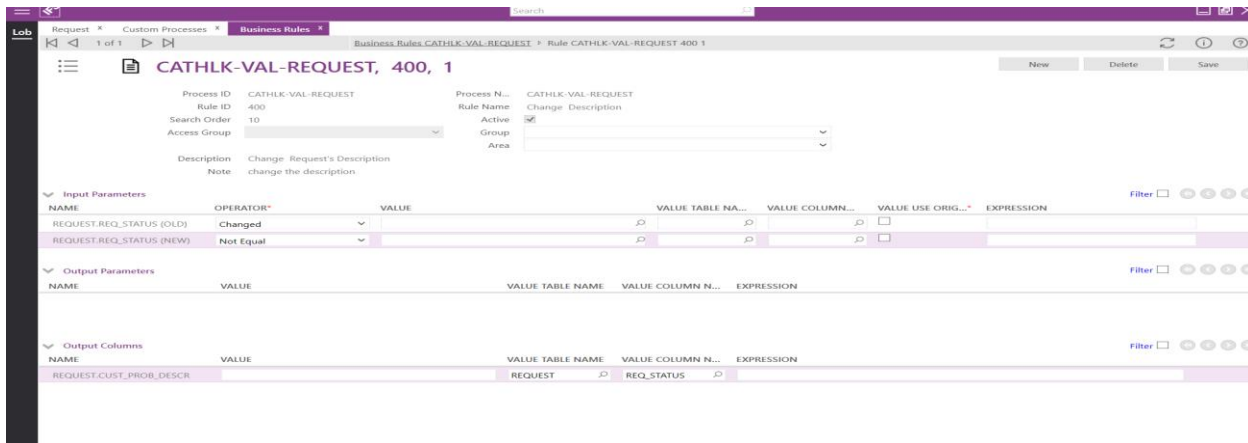
Rules Process Output

RULE ID	SEARCH O...	RULE NAME*	NOTE	ACTI...	ACCESS GROUP	GROUP	AREA	INTEGRATION...	MODIFIED...	MODIFIED
400	10	Change Description	change the description	<input checked="" type="checkbox"/>					CATHLK	10/1/2018 11:52 AM

Rule Input

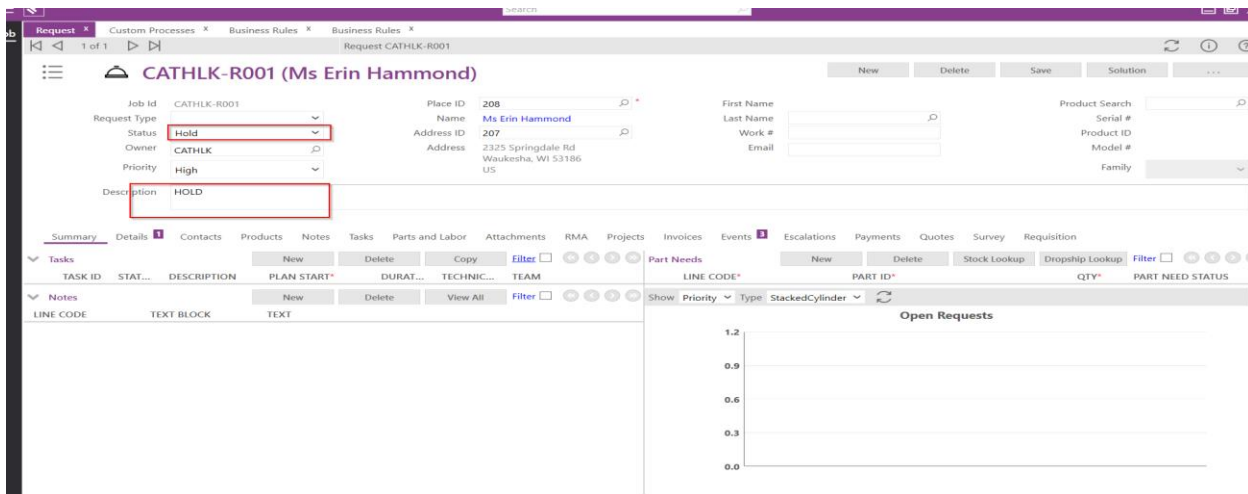
TABLE NAME	COLUMN NAME	USE ORIGINAL VA...	USE EXPRESSION*	INPUT...	CREATED BY	CREATED	MODIFIED BY	MODIFIED
REQUEST	REQ_STATUS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	190	CATHLK	10/1/2018 11:52 AM	CATHLK	10/1/2018 11:58 AM
REQUEST	REQ_STATUS	<input type="checkbox"/>	<input type="checkbox"/>	191	CATHLK	10/1/2018 11:58 AM	CATHLK	10/1/2018 11:59 AM

5). Add Rule Condition and Out put based on customer requirement



The screenshot shows the 'Business Rules' configuration interface. The rule is named 'CATHLK-VAL-REQUEST, 400, 1'. It has a Process ID of 'CATHLK-VAL-REQUEST' and a Rule ID of '400'. The rule is active and its description is 'Change: Request's Description'. The 'Input Parameters' section shows a condition: 'REQUEST.REQ_STATUS (OLD)' is 'Changed' and 'REQUEST.REQ_STATUS (NEW)' is 'Not Equal'. The 'Output Parameters' section shows the output: 'REQUEST.CUST_PROB_DESCR'. The 'Output Columns' section shows the output: 'REQUEST' and 'REQ_STATUS'.

6). Now Go back to Request you created and then change the Status to different value than exists. You will see description change accordingly.



The screenshot shows the 'Request' form for 'CATHLK-R001 (Ms Erin Hammond)'. The 'Status' is set to 'Hold' and the 'Description' is 'HOLD'. The 'Job Id' is 'CATHLK-R001', 'Place ID' is '208', 'Request Type' is 'CATHLK', 'Owner' is 'Ms Erin Hammond', 'Priority' is 'High', and 'Address ID' is '207'. The 'Description' field is highlighted with a red box. The 'Summary' tab is selected, showing a table with columns: TASK ID, STAT..., DESCRIPTION, PLAN START..., DURAT..., TECHNIC..., TEAM. The 'Part Needs' section shows a table with columns: LINE CODE*, PART ID*, QTY*, PART NEED STATUS. The 'Open Requests' section shows a bar chart with a y-axis from 0.0 to 1.2.

Likewise, you can try for different business rules (validation, alert etc..) some complex type BR will be covered in advanced training program.

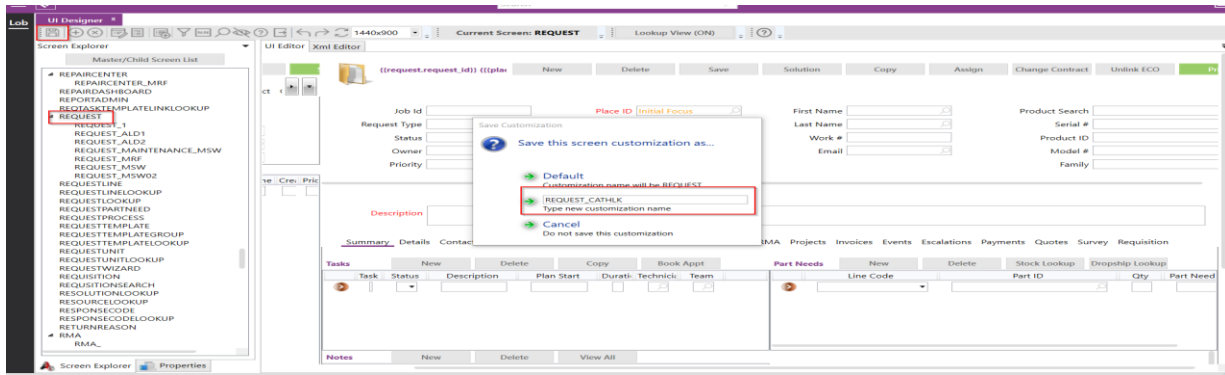
Example 2 : Create own notification rule or validation rule for request Screen

That's is , when user change request Status validate the process when there is no value for Priority

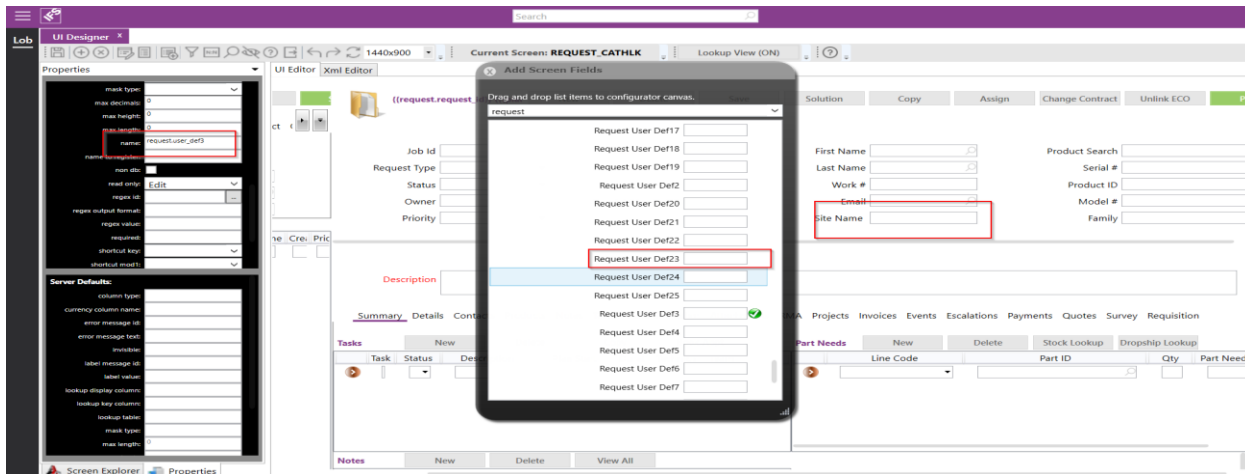
B). UI DESIGNER

Business Requirement: Customer need customized Request Screen to cater their specific business. For example, first they need to change the names of labels, add new fields to screen

1). Create Customized Request Screen



2). Add new Field User_def 3 as Site Name to your screen .



3). Set up your own request Screen to current Screen . Refresh cache to get this effect.

UI Designer

Role

Request

1 of 17

Role ADMIN

ADMIN

Role ADMIN

Homepage Function ID

ADMIN

Description Sys Admin role for FSM

Incremental

Initial Lobby ID

Created By ADMIN

Created 10/24/2011 2:15 PM

Modified By CSR

Modified 12/9/2016 3:53 PM

Summary

Menus

Functions

Views

Screens

Reports

Access Groups

Processes

Workstations

Workflows

Tables

Lobbies

People

CUSTOMIZATION NAME*

REQUEST_CATHLK

SCREEN NAME*

REQUEST

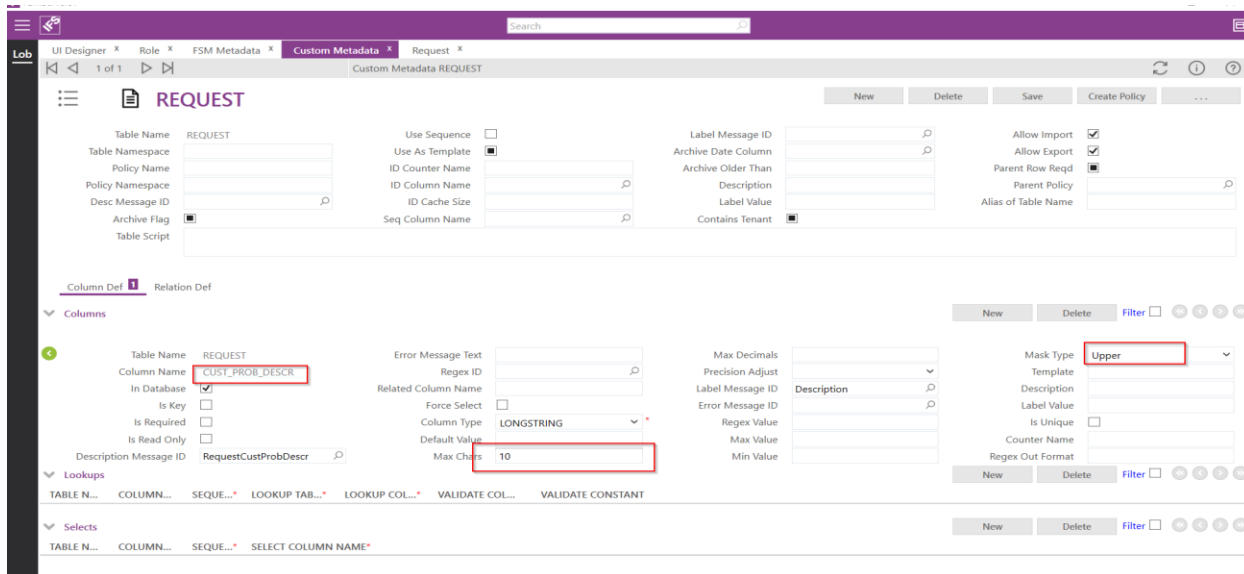
C). Custom Metadata

Business Requirement: Customer Need to change the relationships between tables , changes some column width of table columns or some list of values of fields etc.. Also Create Own tables, relationships between them. (Bit more Technical understanding required.)

1). Check How FSM Metadata Looks Like. Ex. Request

[illegible]

2). Override existing FSM metadata on request screen to limit the number of character in Description field.



The screenshot shows the 'REQUEST' table configuration in the 'Custom Metadata' tab. The 'Columns' section is expanded, showing the 'CUST_PROB_DESCR' column. The 'Mask Type' is set to 'Upper'. The 'Max Chars' is set to 10. The 'Description' is 'RequestCustProbDescr'.

3). Change the relationship between Request and Task table. (you do not need Db Admin to do that). In Base line functionality (FSM Metadata), it has RESTRICTED_DELETE Relation from request to task Table . it means we can't delete the Request when there is task associated with it . But you can change the custom metadata to change this relationship. For example you can add CASCADE_DELETE relationship type which means once you delete request system should delete Task.