SOMAX

V2-712

PM Scheduling – Multiple Assignments

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Table of Contents

[Executive Summary 2](#_Toc140050209)

[Data Structure Changes 2](#_Toc140050210)

[New Tables 2](#_Toc140050211)

[PMSchedAssign 2](#_Toc140050212)

[Changes to Preventive Maintenance Detail Page 2](#_Toc140050213)

[Change PM Schedule Grid to Master/Detail Grid 2](#_Toc140050214)

[Master Grid (Table - PrevMaintSched) 3](#_Toc140050215)

[Detail Grid (Table - PMSchedAssign) 3](#_Toc140050216)

[Change the Action column to display a popup context menu 3](#_Toc140050217)

[Add Assignment Function 4](#_Toc140050218)

[Add Assigned User 4](#_Toc140050219)

[Edit Estimated Hours 5](#_Toc140050220)

[Delete Assignment Record 5](#_Toc140050221)

[Update PM Generate Work Order Function 6](#_Toc140050222)

[Create Work Order Scheduling Records 6](#_Toc140050223)

[Remove Process that Uses PM Assigned To 6](#_Toc140050224)

[Update PM Forecast 7](#_Toc140050225)

[Create Assignment Records 7](#_Toc140050226)

[Master Grid 7](#_Toc140050227)

[Detail Grid 7](#_Toc140050228)

[Remove Process that Uses PM Assigned To 7](#_Toc140050229)

[Revision Notes 7](#_Toc140050230)

# Executive Summary

SOMAX would like to give the client the ability to assign multiple users to a PM Scheduling record. When PM Work Orders are generated, the function will assign and schedule any assigned users to the generated work orders.

# Data Structure Changes

## New Tables

### PMSchedAssign

| **Item** | **Column Name** | **Type (Size)** | **Null** | **Default** | **Description** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  | ClientId | Bigint | No | N/A | Client ID | PrimaryKey |
|  | PMSchedAssignId | Bigint | N/A | N/A | PM Scheduling Assign ID | PrimaryKey |
|  | PrevMaintSchedId | Bigint | No | 0 | PM Scheduling ID |  |
|  | PersonnelId | Bigint | No | 0 | Assigned Personnel ID |  |
|  | ScheduledHours | Dec(8,2) | No | 0.00 | Scheduled Hours |  |
|  | CreateBy | Nvarchar(255) | No | ‘’ | Create By |  |
|  | CreateDate | Datetime2 | Yes |  | Create Date |  |
|  | ModifyBy | NVarchar(255) | No | ‘’ | Modify By |  |
|  | ModifyDate | Datetime2 | Yes |  | Modify Date |  |

# Changes to Preventive Maintenance Detail Page

To support the new functionality, changes need to be made to the current PM Detail Page. They would include the following:

* Change PM Schedule Grid to Display Assignment Records (Master/Detail Grid)
* Change the Action column to display a popup context menu
* Add Assignment Function

## Change PM Schedule Grid to Master/Detail Grid

We would like for the PM Schedule grid to display both PM Schedule (Table: PrevMaintSched) records and corresponding Assignment records (Table: PMSchedAssign). We would like to use a Master/Detail grid to show the records.

A screenshot of a computer

Description automatically generated

As with other SOMAX G4 search pages, the search grid is paginated and displays a specified number of results per page.

### Master Grid (Table - PrevMaintSched)

We would like to leave the current grid definition as it is currently defined.

### Detail Grid (Table - PMSchedAssign)

This sub grid will display assignment records associated with the Preventive Maintenance Schedule record. You will need to link to the PrevMaintSched table using PrevMaintSched.PrevMaintSchedId = PMSchedAssign.PrevMaintSchedId. We would like to have the following columns on the detail grid:

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Source** | **Notes** |
| Personnel ID | Personnel.ClientLookupId | Link to Personnel table via PMSchedAssign.PersonnelId = Personnel.PersonnelId |
| Name | Personnel.FirstName + Personnel.LastName | Link to Personnel table via PMSchedAssign.PersonnelId = Personnel.PersonnelId |
| Estimated Hours | PMSchedAssign.ScheduledHours |  |

## Change the Action column to display a popup context menu

With the added functionality against PM Scheduling records, we will need to display a popup context menu from the PM Scheduling grid.

Graphical user interface, application

Description automatically generated

Please perform the following:

* Remove the icons (Add, Edit, and Delete) from the Action column. Replace the icons with a **more** icon.
* Add context menu for function access. The user will access the storeroom functions from the newly added popup context menu. The user will click the more icon to access the menu.  
  Graphical user interface, text, application

  Description automatically generated  
  The menu will display the functions that logged in user has access. Also, the menu will use descriptions like the action menu instead of icons.

The context menu will contain the following entries:

* Add
* Edit
* Delete
* Assignments

## Add Assignment Function

The Assignment function will be added to the Action context menu on the PM Scheduling grid. When the user selects Assignments from the Action menu, the function will display a popup window that contains a grid that displays the Assigned users.

A white rectangular object with black lines

Description automatically generated

We would like to have the following columns on the grid:

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Source** | **Notes** |
| Personnel ID | Personnel.ClientLookupId | Link to Personnel table via PMSchedAssign.PersonnelId = Personnel.PersonnelId |
| Name | Personnel.FirstName + Personnel.LastName | Link to Personnel table via PMSchedAssign.PersonnelId = Personnel.PersonnelId |
| Estimated Hours | PMSchedAssign.ScheduledHours |  |
| Action |  | Add and Delete icons |

### Add Assigned User

The page will contain an Add Assign User button on bottom of empty grid or  in actions column on grid.

Function: Used to add assign user to PM Schedule record

Button Text: Add Assign User

When the user clicks the Add button, the program will display a popup to allow the user to input the user information. The Add Assigned User popup page will display the following items:

| **Item** | **Input** | **Description** | **Required** | **Notes** |
| --- | --- | --- | --- | --- |
|  | PMSchedAssign.PersonnelId | Personnel | Y | Should have Personnel Lookup1 |
|  | PMSchedAssign.ScheduledHours | Estimated Hours | N |  |

**Note1:** The Personnel column (PMSchedAssign.PersonnelId) should have a Table lookup. The lookup should only show personnel meeting the following criteria:

* Active Personnel
* Personnel that are either Full Users or Admins
* Personnel where Schedule Employee is equal to 1 (Personnel.ScheduleEmployee=’1’)



Lookup grid should display Personnel ID (Personnel.ClientLookupId), Personnel Last Name, Personnel First Name. When the user selects a personnel record from the list, the column will display the Personnel First and Last Name.

After the user has entered in the information, they will click the **Save** button to add the new record. The new add assigned user procedure should also include the following:

#### PMSchedAssign

| **Item** | **Column** | **Source** | **Notes** |
| --- | --- | --- | --- |
|  | PMSchedAssignId | Identity – Supplied by the SQL Server |  |
|  | ClientId | Logged In User’s ClientId |  |
|  | PrevMaintSchedId | PrevMaintSched.PrevMaintSchedId of selected Preventive Maintenance Schedule record |  |
|  | PersonnelId | User Entered |  |
|  | ScheduledHours | User Entered |  |
|  | CreateBy | Logged In User’s User Name |  |
|  | CreateDate | GetUTCDate |  |
|  | ModifyBy | Logged In User’s User Name |  |
|  | ModifyDate | GetUTCDate |  |

### Edit Estimated Hours

In the Estimated Hours (PMSchedAssign.ScheduledHours) column, the user will be allowed to modify the value. Once the user has entered a value into the column, the column will indicate that the value has been entered.  
Graphical user interface, application

Description automatically generated  
After the user has entered in the information, the function will update the record. The sp will need to update the following:

#### PMSchedAssign

| **Item** | **Column** | **Source** | **Notes** |
| --- | --- | --- | --- |
|  | ScheduledHours | User Entered |  |
|  | ModifyBy | Logged In User’s User Name |  |
|  | ModifyDate | GetUTCDate |  |

### Delete Assignment Record

Function: Used to delete assignment record.

Button: Delete icon

To delete an assignment record, the user should click the Delete button. After the record is deleted, the grid should be refreshed.

# Update PM Generate Work Order Function

Please update the Generate PM Work Order function on the PM Generate Work Orders page.

A screenshot of a computer

Description automatically generated with medium confidence

When generating Preventive Maintenance Work Orders, the code must be changed to support the multiple assignments. The following changes should be made to the function:

## Create Work Order Scheduling Records

If the PM Scheduling record has associated PM Assignment records, the generate function should create corresponding Work Order Schedule (Table: WorkOrderSchedule) records for the newly created work order and set work order status to Scheduled.

**Note:** if no PM Assignment records are associated with the PM Scheduling record, the process should set the work order status to Approved.

## Remove Process that Uses PM Assigned To

Remove the current process that uses the PM Assigned To (PrevMaintSched.AssignedTo\_PersonnelId) to create Work Order Schedule record and set work order status to Scheduled.

# Update PM Forecast

When generating a Preventive Maintenance forecast, the code must be changed to support the multiple assignments. The following changes should be made to the function:

## Create Assignment Records

If the PM Scheduling record has associated PM Assignment records, the forecast function should create corresponding Assignment records. We would like for the results grid to display both PM Schedule records and corresponding Assignment records. We would like to use a Master/Detail grid to show the records.

A screenshot of a computer

Description automatically generated

### Master Grid

Please remove the Assign To column from the current grid definition. Leave the rest of the columns on this grid.

The results grid should be These should be displayed as a sub grid

### Detail Grid

This sub grid will display assignment records associated with the Preventive Maintenance Schedule record. We would like to have the following columns on the detail grid:

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Source** | **Notes** |
| Personnel ID | Personnel.ClientLookupId | Link to Personnel table via PMSchedAssign.PersonnelId = Personnel.PersonnelId |
| Name | Personnel.FirstName + Personnel.LastName | Link to Personnel table via PMSchedAssign.PersonnelId = Personnel.PersonnelId |
| Estimated Hours | PMSchedAssign.ScheduledHours |  |

## Remove Process that Uses PM Assigned To

Remove the current process that uses the PM Assigned To (PrevMaintSched.AssignedTo\_PersonnelId).

# Revision Notes