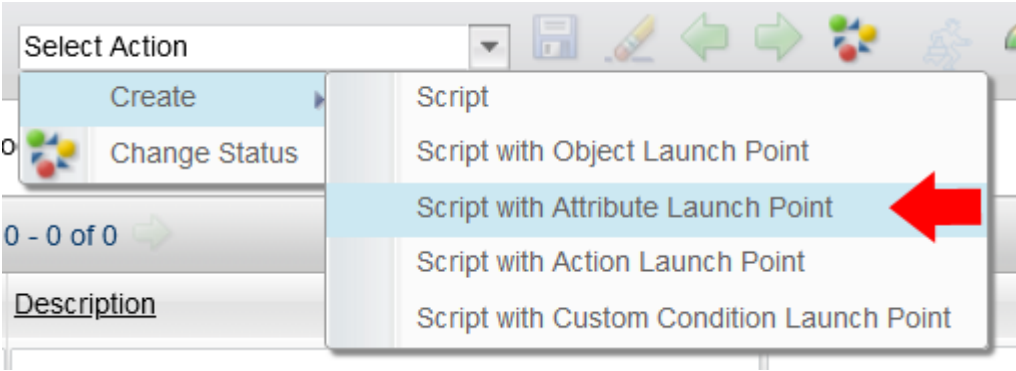


Maximo: Make MEMO field mandatory on specified status and allow the description value to be selected from a domain list (Using Automation Scripts)

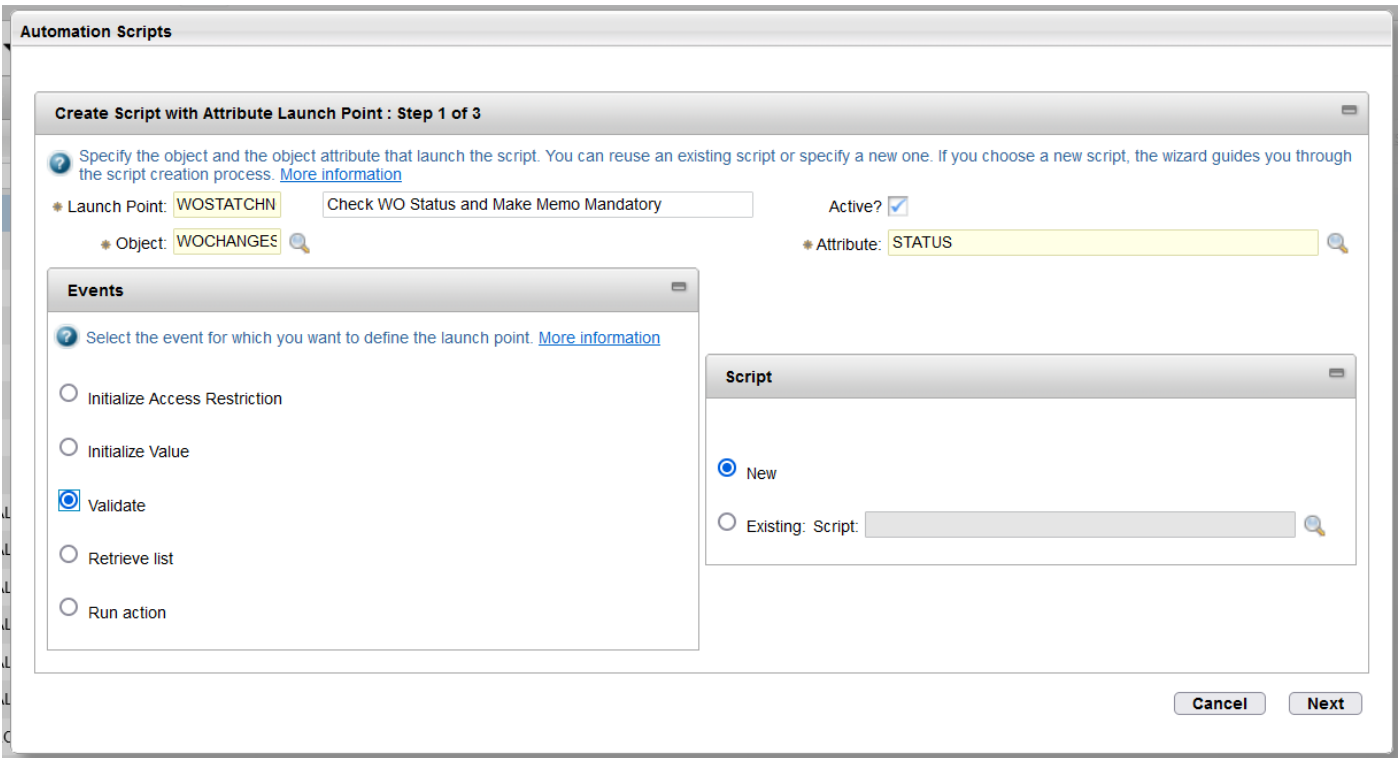
To make the MEMO field mandatory

1. Go to the “System Configuration/Platform Configuration/Automation Scripts” application.
2. From the “Select Action” menu, select the “Create Script with Attribute Launch Point” option:



3. In “Step 1”, enter the launch point name / description and set the object and attribute values:

Launch Point Name: WOSTATCHNG
Launch Point Description: Check WO Status and Make Mandatory
Object: WOCHANGESTATUS
Attribute: STATUS



4. Once you have entered the details, click on the “Next” button.

5. In "Step 2", enter the Script name and Description:

Script: WOSTATCHNG

Description: Check WO Status and Make Mandatory

Automation Scripts

Create Script with Attribute Launch Point : Step 2 of 3

Launch Point: WOSTATCHN Check WO Status and Make Memo Mandatory

* Script: WOSTATCHNG Check WO Status and Make Memo Mandatory

* Script Language: python

Object: WOCHANGES

* Log Level: ERROR

Import

You can import a script file that you created in another application or you can enter a script in the Source Code field in the next step.

Import a Script File: Browse... No file selected. Import

Variables: Filter 0 - 0 of 0 Download

Variable	Variable Type	Binding Type	Binding Value	Override?
There are no rows to display.				

New Row

Cancel Previous Next

6. Once you have entered the details, click on the "Next" button.

7. In "Step 3", enter the script (as below):

Automation Scripts

Create Script with Attribute Launch Point : Step 3 of 3

You can enter a script in the Source Code field, or you can import a script file in the previous step.

Launch Point: WOSTATCHN Check WO Status and Make Mandatory

Script: WOSTATCHNG Check WO Status and Make Mandatory

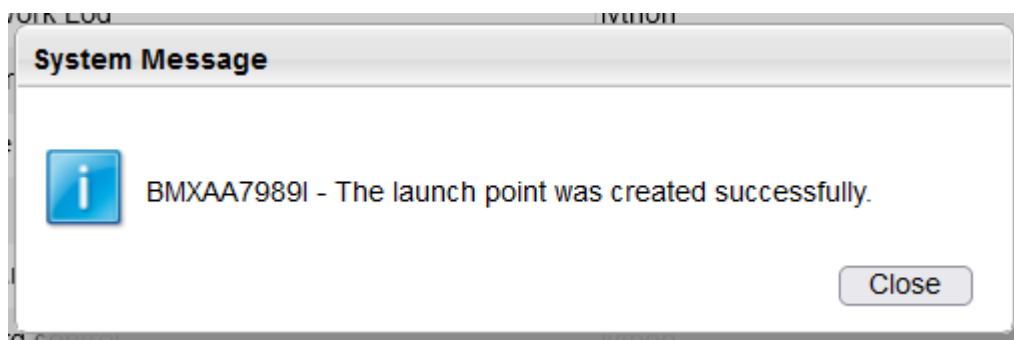
Object: WOCHANGES

```
1 from psdi.mbo import MboConstants
2
3 if mbo.getString("STATUS") == "RESCHED":
4     mbo.getMboValue("MEMO").setRequired(True)
5
6 else:
7     mbo.getMboValue("MEMO").setRequired(False)
```

Cancel Previous Create

8. Click on the "Create" button to create and activate the script (you may need to scroll down to see the buttons!).

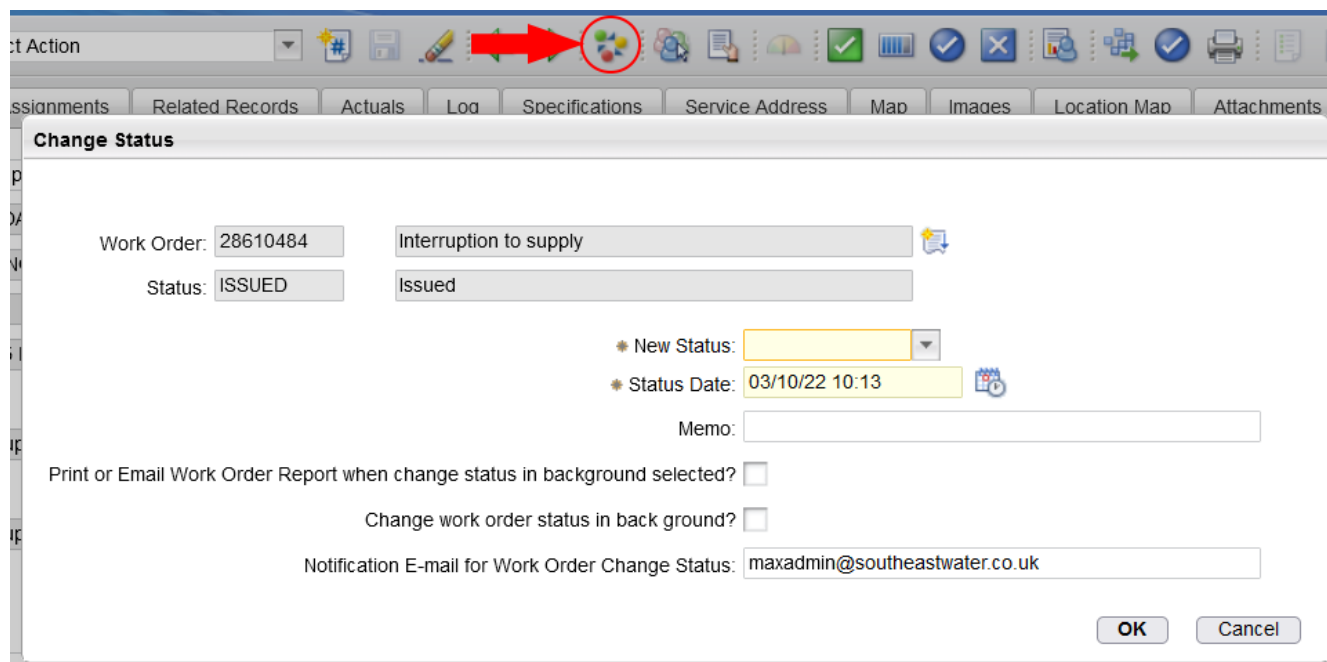
9. Once the script has been created, a success message will be displayed:



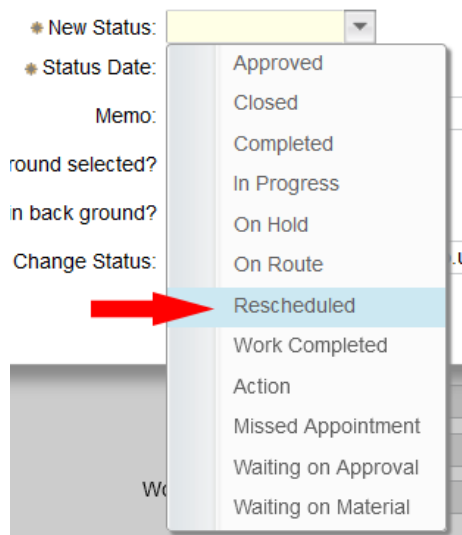
Testing the automation script

10. Go to the "Work Order Tracking" application and select a work order where you can change the status to "Rescheduled".

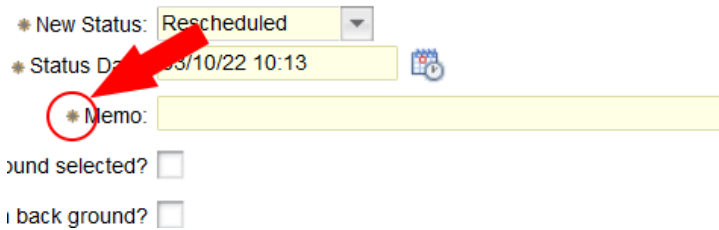
11. Click on the "Change Status" icon:



12. In the "New Status" field, select "Rescheduled" from the list:



13. You will see that the **Memo** field is now mandatory:



New Status: Rescheduled

Status Date: 03/10/22 10:13

* Memo:

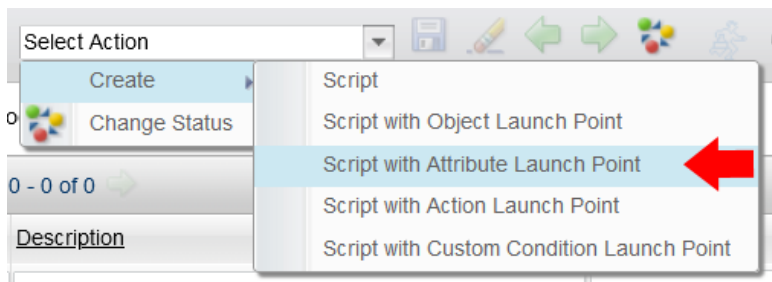
Sound selected? ☐

Background? ☐

Automation script for Memo Status Reasons

14. Go to the “System Configuration/Platform Configuration/Automation Scripts” application.

15. From the “Select Action” menu, select the “Create Script with Attribute Launch Point” option:



16. In “Step 1”, enter the launch point name / description and set the object and attribute values. Make sure that you change the “Event” type:

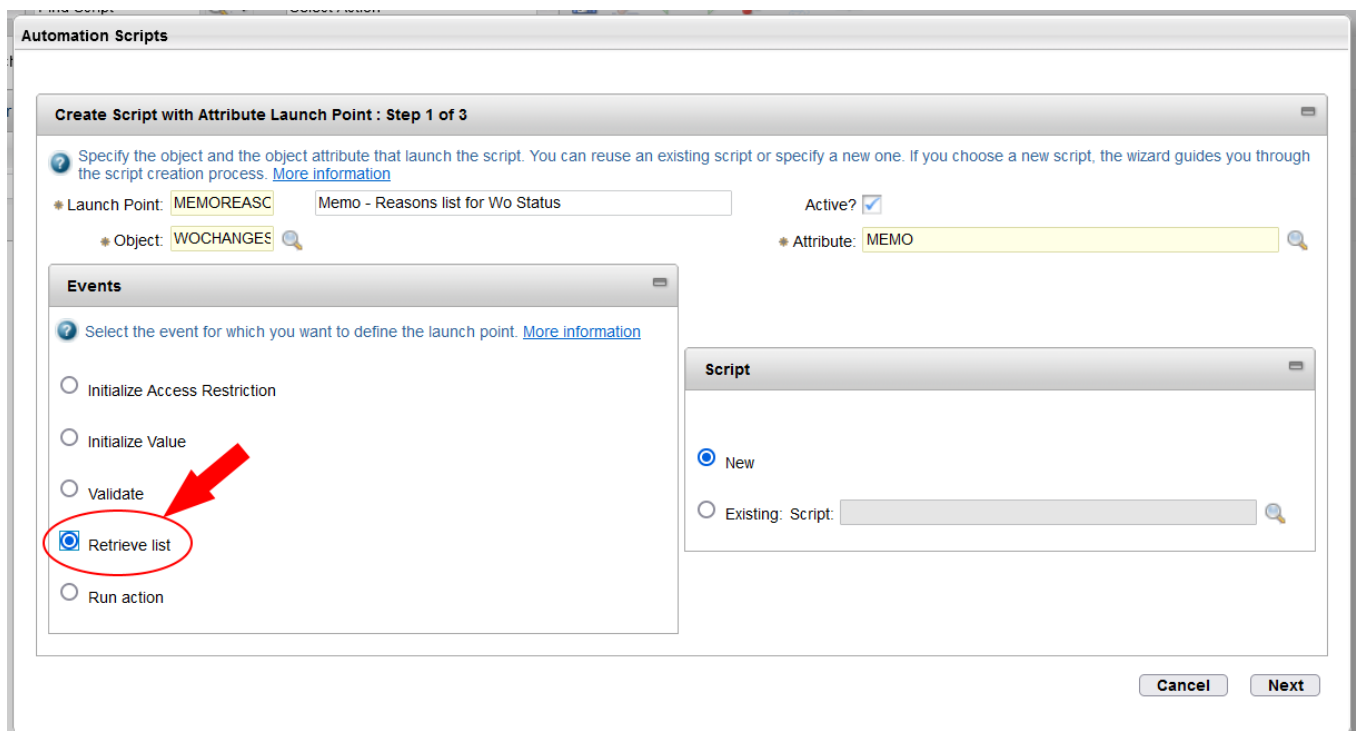
Launch Point Name: MEMOREASON

Launch Point Description: Memo - Reasons list for Wo Status

Object: WOCHANGESTATUS

Attribute: MEMO

Events: Retrieve List



Automation Scripts

Create Script with Attribute Launch Point : Step 1 of 3

Specify the object and the object attribute that launch the script. You can reuse an existing script or specify a new one. If you choose a new script, the wizard guides you through the script creation process. [More information](#)

Launch Point: MEMOREASON Memo - Reasons list for Wo Status Active? ☒

Object: WOCHANGES Attribute: MEMO

Events

Select the event for which you want to define the launch point. [More information](#)

☐ Initialize Access Restriction

☐ Initialize Value

☐ Validate

☒ Retrieve list

☐ Run action

Script

☒ New

☐ Existing: Script:

Cancel Next

17. Once you have entered the details, click on the “Next” button.

18. In “Step 2”, enter the Script name and Description:

Script: MEMOREASON

Description: Memo - Reasons list for Wo Status

Automation Scripts

Create Script with Attribute Launch Point : Step 2 of 3

Launch Point: MEMOREASC Memo - Reasons list for Wo Status

* Script: MEMOREASON Memo - Reasons list for Wo Status

* Script Language: python

Object: WOCHANGES

* Log Level: ERROR

Import

You can import a script file that you created in another application or you can enter a script in the Source Code field in the next step.

Import a Script File: Browse... No file selected. Import

Variables: Filter 0 - 0 of 0

Variable	Variable Type	Binding Type	Binding Value	Override?
There are no rows to display.				

New Row

Cancel Previous Next

19. Once you have entered the details, click on the “Next” button.

20. In “Step 3”, enter the script (as below):

Automation Scripts

Create Script with Attribute Launch Point : Step 3 of 3

You can enter a script in the Source Code field, or you can import a script file in the previous step.

Launch Point: MEMOREASC Memo - Reasons list for Wo Status

Script: MEMOREASON Memo - Reasons list for Wo Status

Object: WOCHANGES

```
1 def selDomain(value):
2     return {
3         "RESCHED" : "RESCHEDREASON"
4     }.get(value, "DEFAULTREASON")
5
6 relationObject = "ALNDOMAIN"
7
8 WhereClause = "domainid = '" + selDomain(mbo.getString("STATUS")) + "'"
9
10 relationWhere = WhereClause
11 listWhere = WhereClause
```

Cancel Previous Create

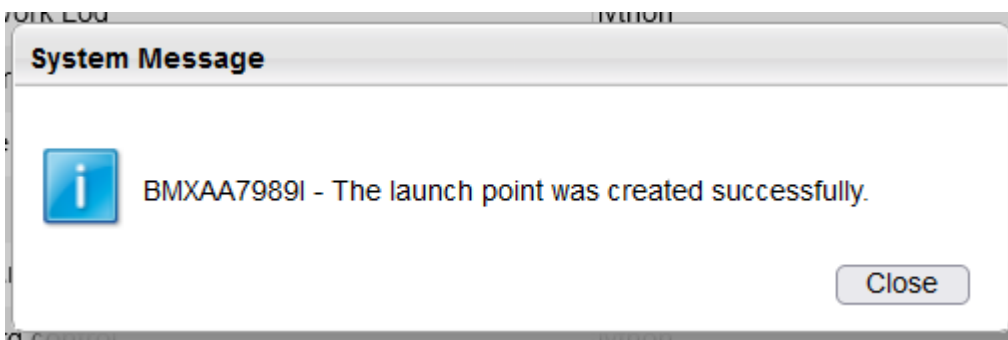
NOTE You will notice in the above function, that if the status is not matched, a default value of “DEFAULTREASON” will be returned. This is a domain configured with an empty (or *default*) value that will be displayed for those statuses where we don’t want a list of reasons for.

21. By using a function in the automation script to determine which domain list to show, you are able to extend this easily to cover other statuses as required. E.g. If you wanted a different list of reasons for “Cancelled” work orders, you could add the following (you would also need a matching ALN Domain!):

```
1 def selDomain(value):
2     return {
3         "RESCHED" : "RESCHEDREASON",
4         "CAN"      : "CANREASON"
5     }.get(value, "DEFAULTREASON")
6
7 relationObject = "ALNDOMAIN"
8
9 whereClause = "domainid = '" + selDomain(mbo.getString("STATUS")) + "'"
10
11 relationWhere = whereClause
12 listWhere = whereClause
```

22. Click on the “Create” button to create and activate the script (you may need to scroll down to see the buttons).

23. Once the script has been created, a success message will be displayed:



Create Required Domains

24. Go to the “System Configuration/Platform Configuration/Domains” application:

25. Click on the “Add New Domain” button and select the “Add New ALN Domain” option:

26. Create a new ALN domain called **RESCHEDREASON** with the (your) following values:

Domain:
Data Type:
Length:

ALN Domain					Download	
<input type="checkbox"/>	Value	Description	Organization	Site		
<input type="checkbox"/>	CUSTOMER_ISSUE	CUSTOMER ISSUE				
<input type="checkbox"/>	OBSTRUCTION	OBSTRUCTION				
<input type="checkbox"/>	SHUT_REQUIRED	PLANNED SHUT REQUIRED / PASS TO SEW				
<input type="checkbox"/>	SEW_ISSUE	SEW ISSUE				
<input type="checkbox"/>	PRIVATE_LAND	JOB IN PRIVATE LAND / NO PERMISSION				
<input type="checkbox"/> Select Records						
					View/Modify Conditions	New Row

27. Once you created all of your domain values, click on the “OK” button to save the domain.

28. Click on the “Add New Domain” button and select the “Add New CROSSOVER Domain” option:

29. Create a new CROSSOVER domain called **WORESCHEDMEMO** with the following values:

Domain:

Object	List Where Clause	Organization	Site
ALNDOMAIN	domainid='RESCHEDREASON'		

New Row

Source Field	Destination Field	Accept NULL value?	No Overwrite?	Sequence
DESCRIPTION	MEMO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

New Row

30. Once you created all of your domain values, click on the “OK” button to save the domain.

31. Click on the “Add New Domain” button and select the “Add New ALN Domain” option:

32. Create a new ALN domain called **RESCHEDREASON** with the (your) following values:

ALN Domain

Domain:

Data Type:

Length:

Value	Description	Organization	Site
DEFAULT			

Select Records

View/Modify Conditions New Row

Set Conditions OK Cancel

33. Once you created your domain value, click on the “OK” button to save the domain.

Modify the WOCHANGESTATUS Object

34. Go to the “System Configuration/Platform Configuration/Database Configuration” application, find the WOCHANGESTATUS object and open it:

Objects		
Status	Object	Description
	wochangestatus	
	WOCHANGESTATUS	Parameters for Work Order Change Status
Select Records		

35. Click on the “Attributes” tab:



Object: WOCHANGES * Parameters for Work Order Change Status

Status	Attribute	Description
	ASOFCODE	Date of the statu

36. Find the **MEMO** attribute and set the “Domain” value to **WORESCHEDMEMO**:

Attributes Filter > 1 - 1 of 1

Status	Attribute	Description	Type	Length	Scale	Primary Colu
	MEMO					
	MEMO	Memo for status change	ALN	100	0	

Details

Attribute: MEMO

Description: Memo for status change

Type: ALN

Length: 100

Scale: 0

Required? ☐

Title: Memo

Class:

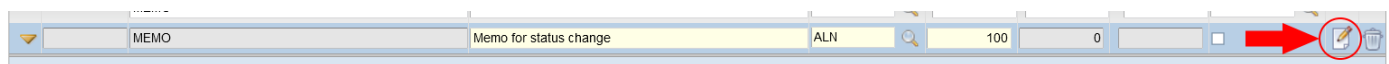
Domain: WORESCHED

Default Value:

Alias: MEMO

Status:

37. Click on the “Edit Lookup Map” button for the **MEMO** attribute:



38. Click on the “New Row” button and enter the following details:

Lookup Map Filter > 1 - 1 of 1

Target Attribute	Source Object	Source Key	Sequence	Allow Null?
MEMO	ALNDOMAIN	DESCRIPTION	1	<input checked="" type="checkbox"/>

Target Attribute: MEMO

Source Object: ALNDOMAIN

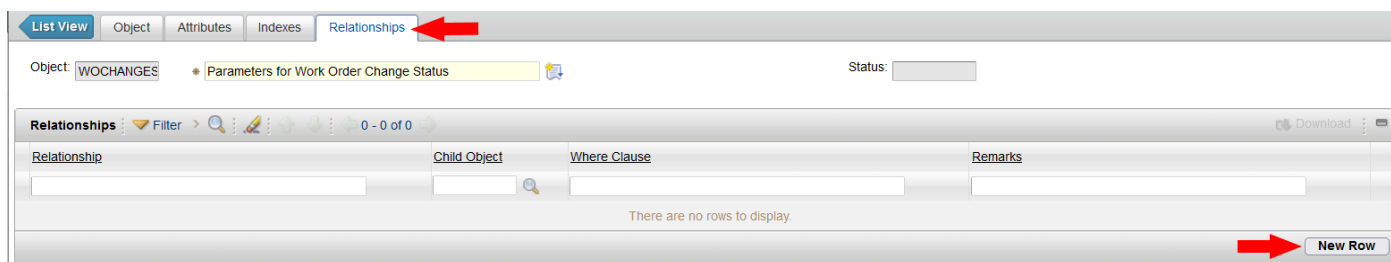
Source Key: DESCRIPTION

Sequence: 1

Allow Null? ☒

39. Click on the “OK” button once done.

40. Click on the “*Relationships*” tab, then click on the “*New Row*” button:

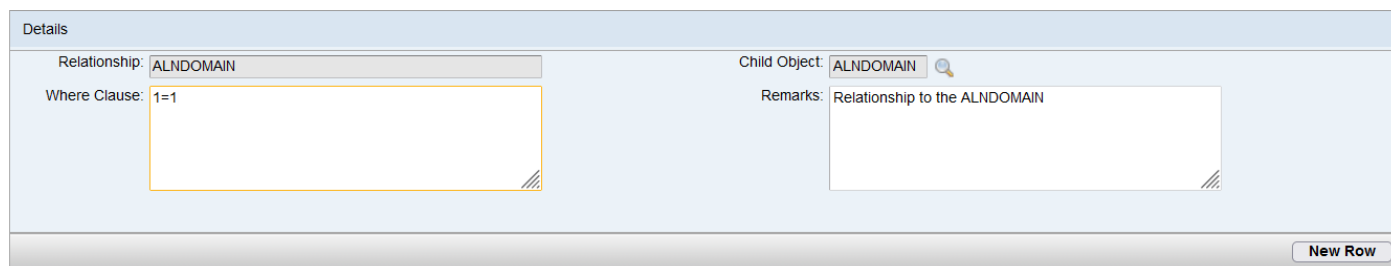


41. Create a new relationship called **ALNDOMAIN** with the following details:

Name: ALNDOMAIN

Child Object: ALNDOMAIN

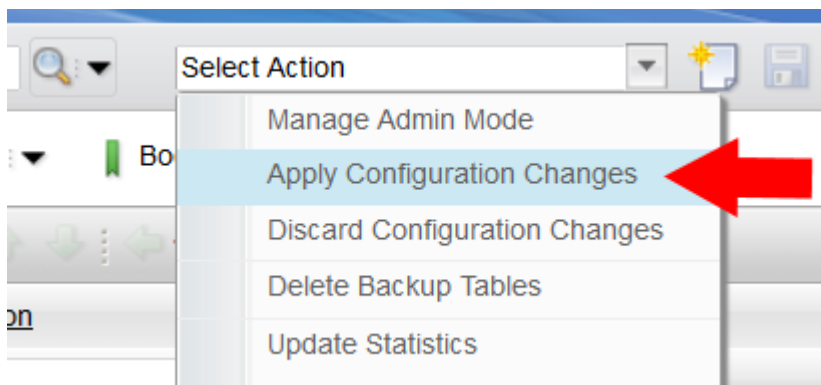
Where Clause: 1=1



NOTE By default, this relationship will select everything from the ALN Domain. We will be relying on the automation script to filter to just the required results.

42. Save the changes to the **WOCHANGESTATUS** object, then return to the “*Database Configuration*” main screen.

43. Click on the “*Select Action*” drop down and select the “*Apply Configuration Changes*” option:



NOTE You might need to put the server into “*Admin Mode*” first!

44. Once the changes have been made and the server is out of “*Admin Mode*”...

45. Use your favourite Database editor, and create the following three entries in the **MAXIMO.MAXLOOKUPMAP** table (there will already be an entry for the *MEMO* field!):

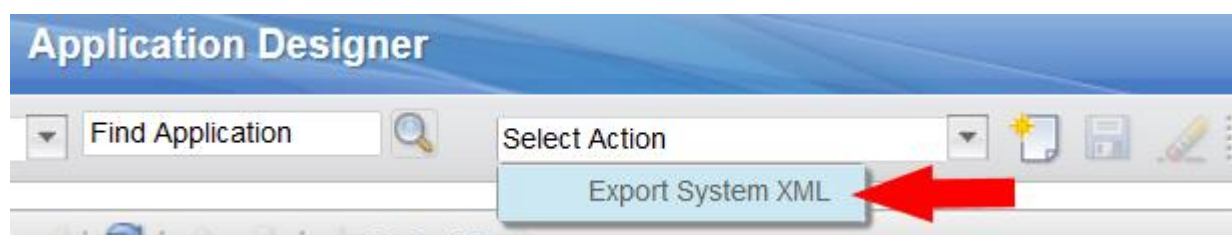
MAXLOOKUPMAP: Created: 18/06/2021 08:44:52 Last DDL: 19/08/2021 10:11:07
Primary Key: <None>

TARGET	LOOKUPATTR	TARGETATTR	SOURCEKEY	SEQNUM	ALLOWNULL	MAXLOOKUPMAPID	SOURCE
WOCHANGESTATUS	DOMAINID	DOMAINID	DOMAINID	2	1	889411	ALNDOMAIN
WOCHANGESTATUS	ORGID	ORGID	ORGID	4	1	889413	ALNDOMAIN
WOCHANGESTATUS	SITEID	SITEID	SITEID	3	1	889412	ALNDOMAIN

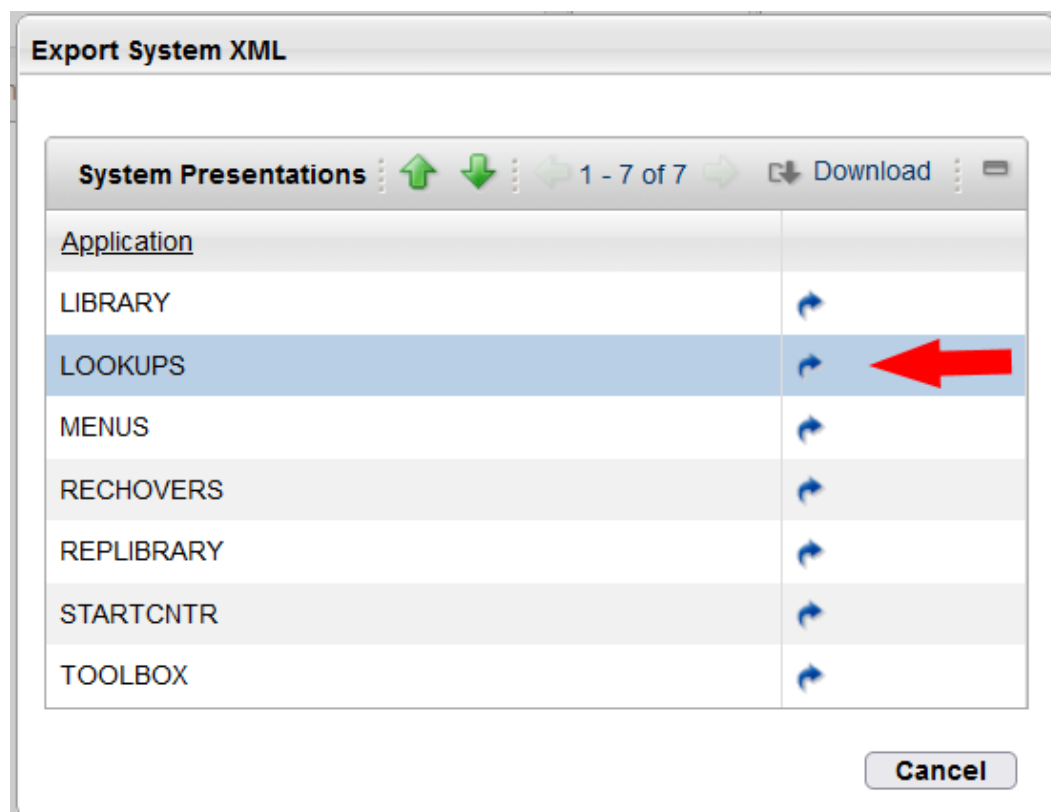
NOTE The *WOCHANGESTATUS* mbo is non-persistent and it doesn't appear to make any difference if you extend the object to include these three fields or not, but you do need the maxlookupmap entries to stop an error being thrown. You will also need to get the correct **MAXLOOKUPMAPID** for each row from the sequence!

Modify the System XML Files

46. Go to the "System Configuration/Platform Configuration/Application Designer" application.
47. Click on the "Select Action" drop down and select the "Export System XML" option:



48. Export the **LOOKUPS** presentation:

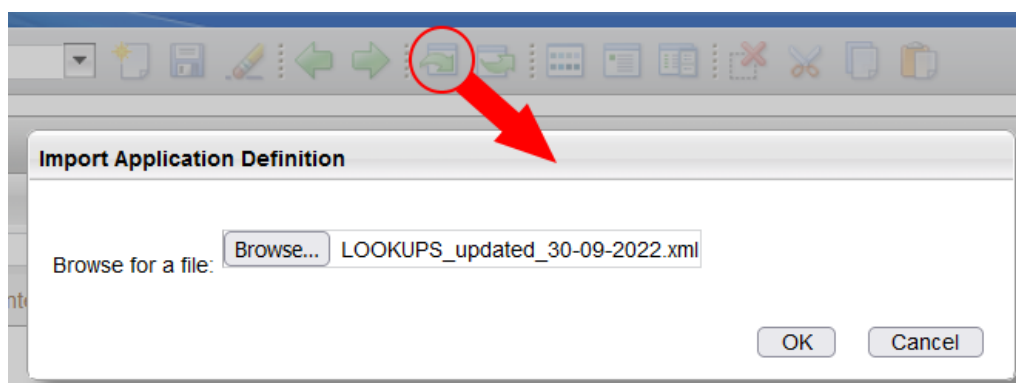


49. Save the file to your local machine and then open it in a text editor.

50. At the end of the file (before the “</systemlib>” closing tag) insert the following text (this is the lookup definition that will display just the “Description” field from the **WORESCHEDMEMO** domain):

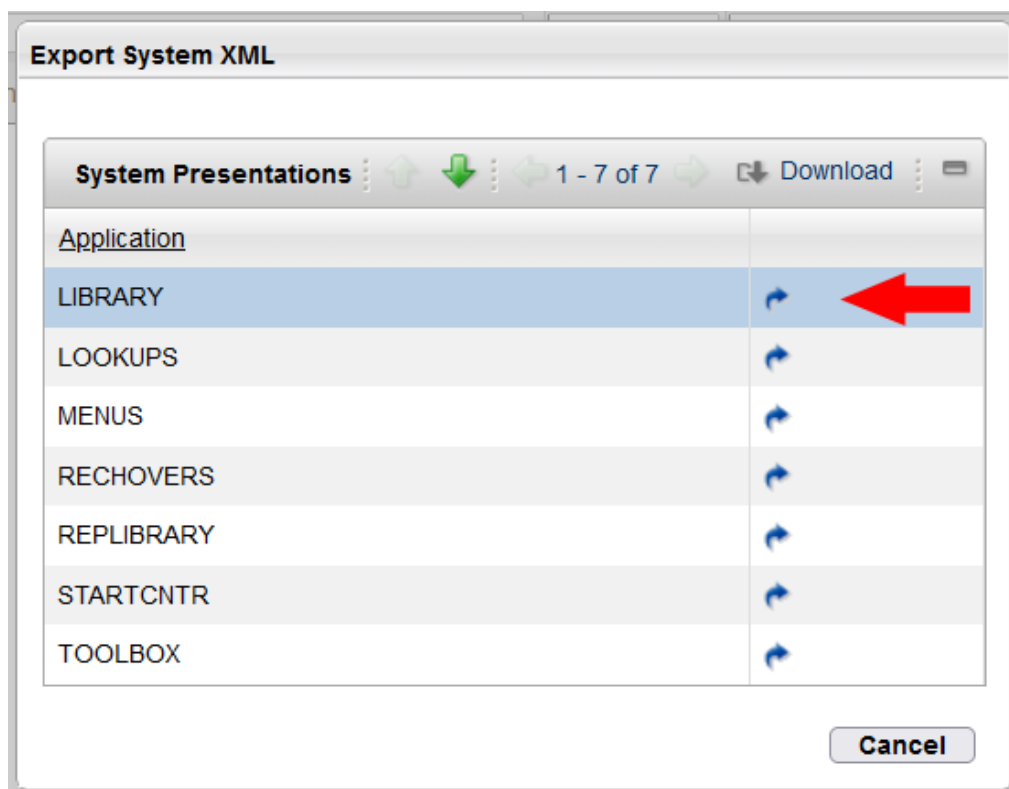
```
<table id="woreschedmemo" inputmode="readonly" selectmode="single">
  <tablebody displayrowsperpage="20" filterable="true" filterexpanded="true"
    id="woreschedmemo_lookup_tablebody">
    <tablecol dataattribute="description" id="woreschedmemo_lookup_tablebody_col_2"
      mxevent="selectrecord" mxevent_desc="Go To %1" sortable="true" type="link"/>
    </tablebody>
  </table>
```

51. Save your changes to the **LOOKUPS.xml** file, then import it back into Maximo:



52. Once you have imported the file, click on the “Select Action” drop down and select the “Export System XML” option:

53. Export the **LIBRARY** presentation:



54. Save the file to your local machine and then open it in a text editor.

55. Search for the section that starts with:

```
<dialog beanclass="psdi.webclient.beans.workorder.WOChangeStatusBean" id="status" label="Change Status"
relationship="WOChangeStatus" savemode="ONLOADUNLOAD">
```

```
<dialog beanclass="psdi.webclient.beans.workorder.WOChangeStatusBean" id="status" label="Change Status" relationship="WOChangeStatus" savemode="ONLOADUNLOAD">
<section id="changestatus_grid1">
<sectionrow id="changestatus_grid1_1">
```

Once you have found it, look for the following line within that section:

```
<textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" sigoption="MEMOBELOWSTATUS"/>
```

```
<section id="changestatus_grid1_1_1_grid4">
<combobox dataattribute="status" id="changestatus_grid1_1_1_grid4_1" smartfilloff="true"/>
<textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3b" sigoption="MEMOABOVESTATUS"/>
<textbox dataattribute="AsOfDate" id="changestatus_grid1_1_1_grid4_2" lookup="datelookup"/>
<textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" sigoption="MEMOBELOWSTATUS"/>
<checkbox dataattribute="printreport" id="changestatus_grid1_1_1_grid5_1"/>
<checkbox dataattribute="async" id="changestatus_grid1_1_1_grid5_1b"/>
<textbox dataattribute="toemailaddr" id="changestatus_grid1_1_1_grid5_1c"/>
</section>
```

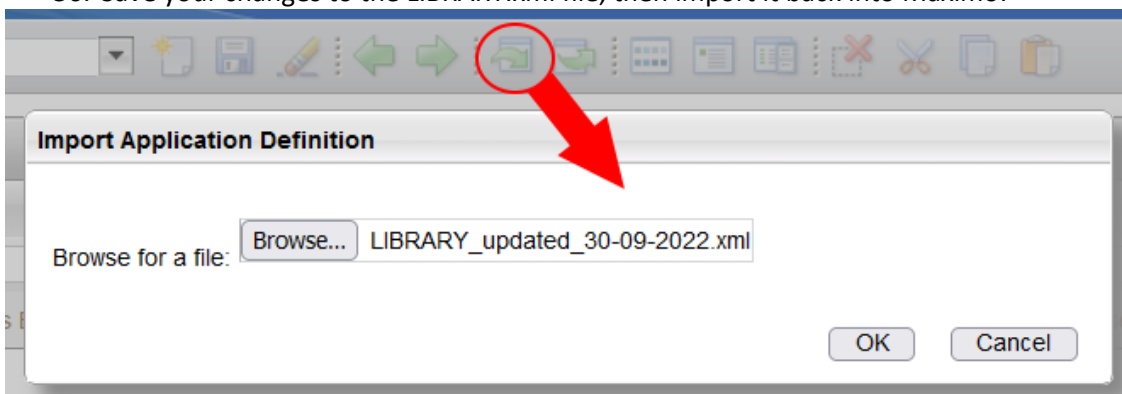
You will need to add the reference to the lookup that you have defined as follows:

```
<textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" lookup="woreschedmemo"
sigoption="MEMOBELOWSTATUS"/>
```

```
<section id="changestatus_grid1_1_1_grid4">
<combobox dataattribute="status" id="changestatus_grid1_1_1_grid4_1" smartfilloff="true"/>
<textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3b" sigoption="MEMOABOVESTATUS"/>
<textbox dataattribute="AsOfDate" id="changestatus_grid1_1_1_grid4_2" lookup="datelookup"/>
<textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" lookup="woreschedmemo" sigoption="MEMOBELOWSTATUS"/>
<checkbox dataattribute="printreport" id="changestatus_grid1_1_1_grid5_1"/>
<checkbox dataattribute="async" id="changestatus_grid1_1_1_grid5_1b"/>
<textbox dataattribute="toemailaddr" id="changestatus_grid1_1_1_grid5_1c"/>
</section>
```

NOTE Your *id* values may be different to the ones shown above!

56. Save your changes to the LIBRARY.xml file, then import it back into Maximo:

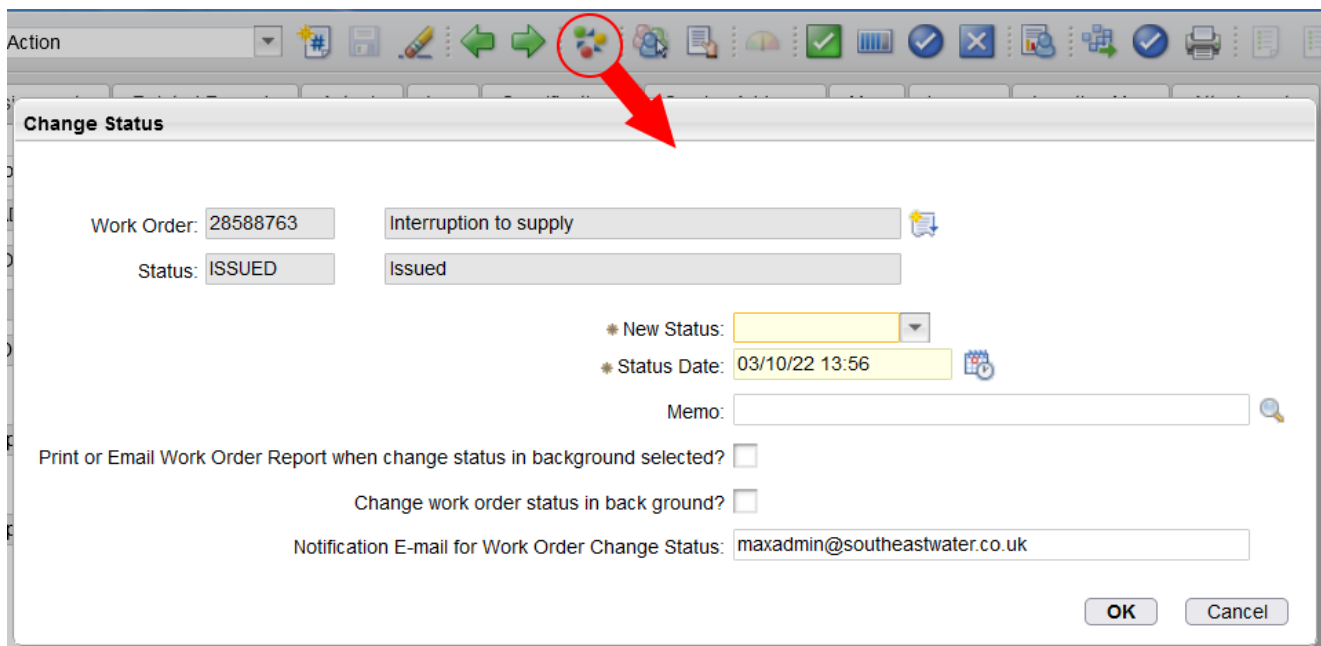


57. Once the file has been imported, log out of Maximo and restart the server (all JVMs!).

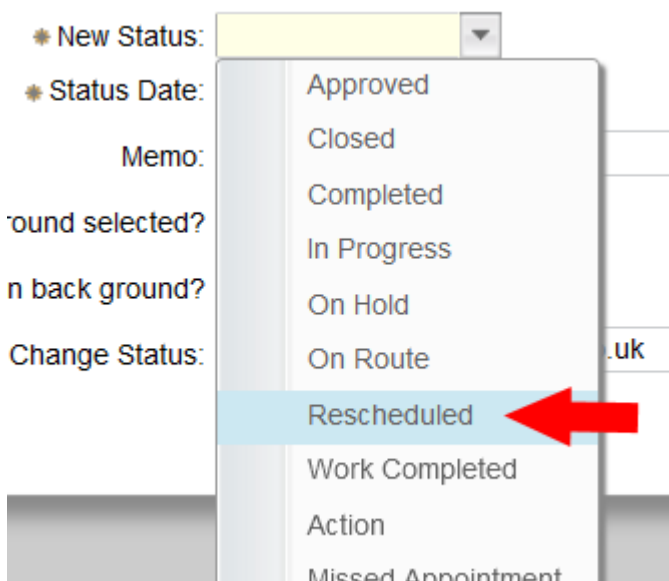
Testing that it works

58. Once Maximo has restarted, log back in and go to the Work Order Tracking application and select a work order where you can change the status to “Rescheduled”.

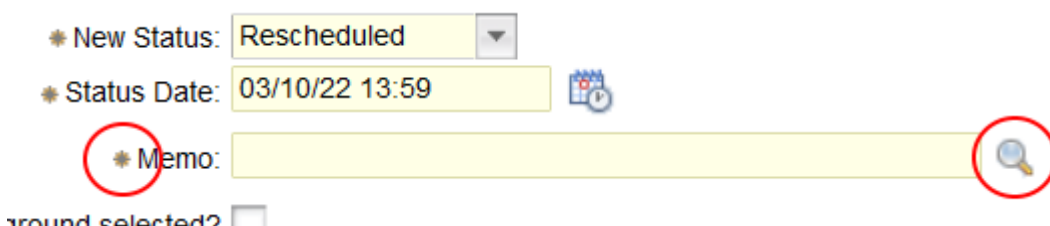
59. Click on the “Change Status” icon:



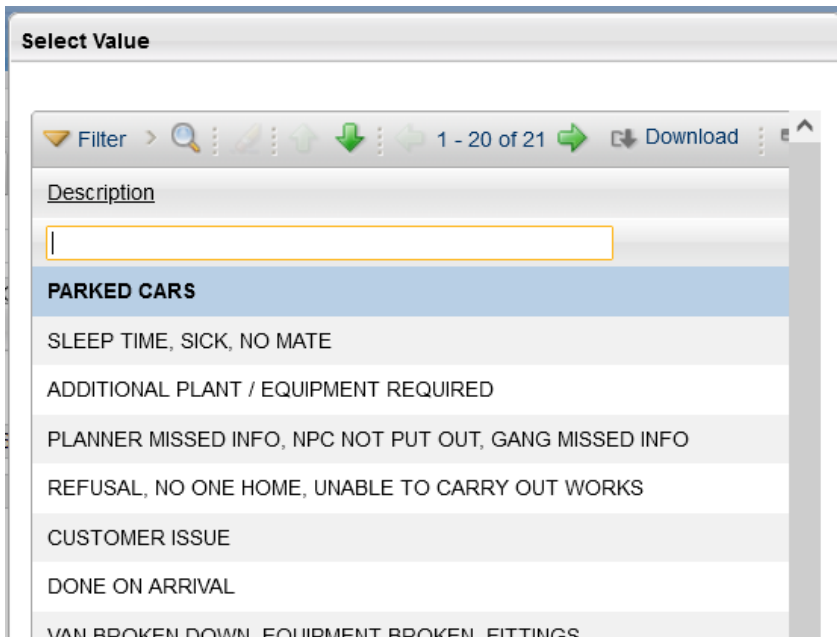
60. In the “New Status” field, select “Rescheduled” from the list:



61. You will see that the **Memo** field is now mandatory:



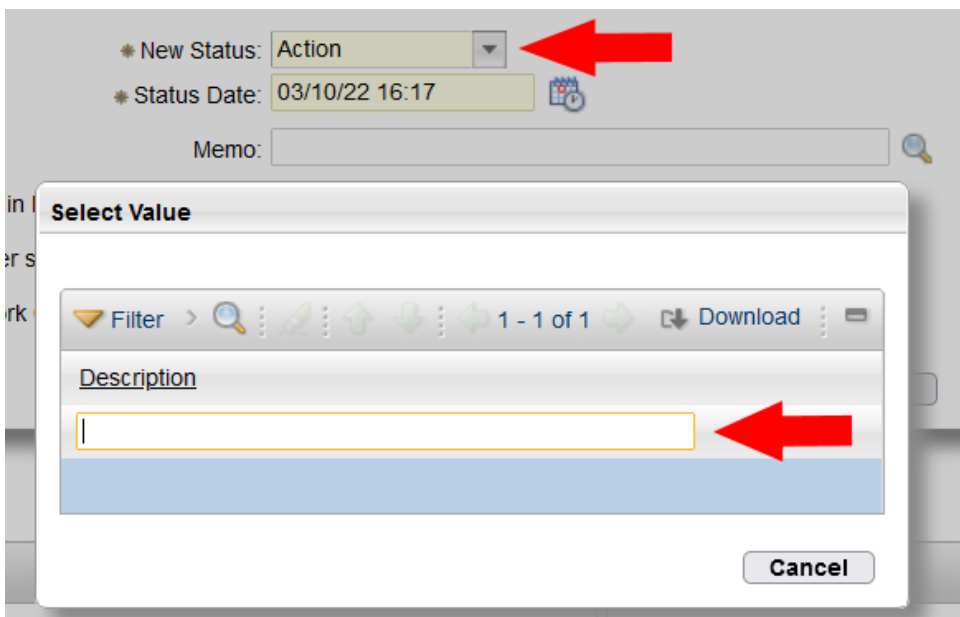
62. If you click on the “Magnifying Glass” icon, the domain popup will be displayed as follows:



The screenshot shows a 'Select Value' popup window. At the top, there is a toolbar with a 'Filter' button, a magnifying glass icon, a list of icons (including a green arrow), and a 'Download' button. Below the toolbar, there is a search bar labeled 'Description'. The main area of the popup displays a list of descriptions, with 'PARKED CARS' highlighted in blue. Other visible descriptions include 'SLEEP TIME, SICK, NO MATE', 'ADDITIONAL PLANT / EQUIPMENT REQUIRED', 'PLANNER MISSED INFO, NPC NOT PUT OUT, GANG MISSED INFO', 'REFUSAL, NO ONE HOME, UNABLE TO CARRY OUT WORKS', 'CUSTOMER ISSUE', 'DONE ON ARRIVAL', and 'VAN BROKEN DOWN, EQUIPMENT BROKEN, FITTINGS'.

NOTE You do not have to select a value from the list, you are free to enter anything you like in the “Memo” field, but it **MUST** have a value!

63. If you select a status that you have not configured a lookup against and you click on the “Magnifying Glass” icon, you should see that you are presented with the blank option (that we configured earlier):







The screenshot shows a 'Select Value' popup window. At the top, there is a toolbar with a 'Filter' button, a magnifying glass icon, a list of icons (including a green arrow), and a 'Download' button. Below the toolbar, there is a search bar labeled 'Description'. The main area of the popup displays a blank description field. A red arrow points to the magnifying glass icon in the toolbar, and another red arrow points to the blank description field. A 'Cancel' button is visible at the bottom right of the popup.

To make the MEMO field mandatory for a certain group(s) of users

64. Go to the “System Configuration/Platform Configuration/Automation Scripts” application:

65. Find the **WOSTATCHNG** script that was created previously:

Scripts     1 - 1 of 1		
Script	Description	Script Language
WOSTATCHNG		
WOSTATCHNG	Check WO Status and Make Mandatory	python
<input type="checkbox"/> Select Records		

66. Change the script from:

Automation Script Details

Script: WOSTATCHNG Check WO Status and Make Mandatory

Script Language: python

```
1 from psdi.mbo import MboConstants
2
3 if mbo.getString("STATUS") == "RESCHED":
4     mbo.getMboValue("MEMO").setRequired(True)
5
6 else:
7     mbo.getMboValue("MEMO").setRequired(False)|
```

67. To:

Automation Script Details

Script: WOSTATCHNG Check WO Status and Make Mandatory

Script Language: python

```
1 from psdi.mbo import MboConstants
2 from psdi.server import MXServer
3
4 def inGroup(groupNameList):
5     retVal = True
6     groupSet = MXServer.getMXServer().getMboSet("GROUPUSER", mbo.getUserInfo())
7     groupSet.setWhere("userid = :&USERNAME& and groupname in (" + groupNameList + ")")
8
9     if groupSet.isEmpty():
10         retVal = False
11
12     groupSet.close()
13     return retVal
14
15 # If the current user is in the specified group, apply readonly flag
16 if inGroup("'D-CONT', 'MAXADMIN'"):
17
18     if mbo.getString("STATUS") == "RESCHED":
19         mbo.getMboValue("MEMO").setRequired(True)
20
21     else:
22         mbo.getMboValue("MEMO").setRequired(False)|
```

NOTE To make the “Memo” field mandatory for other statuses, modify the **IF** statement to include them as follows:

```
if mbo.getString("STATUS") in {"RESCHED", "CAN"}:
    mbo.getMboValue("MEMO").setRequired(True)

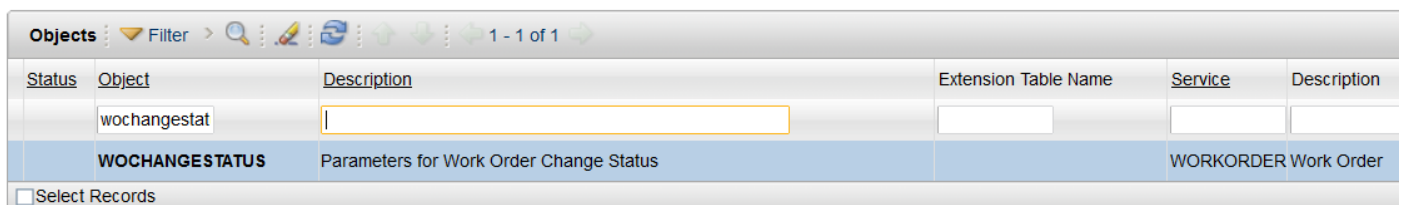
else:
    mbo.getMboValue("MEMO").setRequired(False)|
```

To conditionally show the Memo field with Domain Lookup when one exists

If you want the memo field with domain look-up to only be displayed when there is an associated domain (otherwise display a *normal* memo field) which will aid in prompting the user when a value list is available, you can follow the rest of this guide:

Extend the WOCHANGESTATUS Object

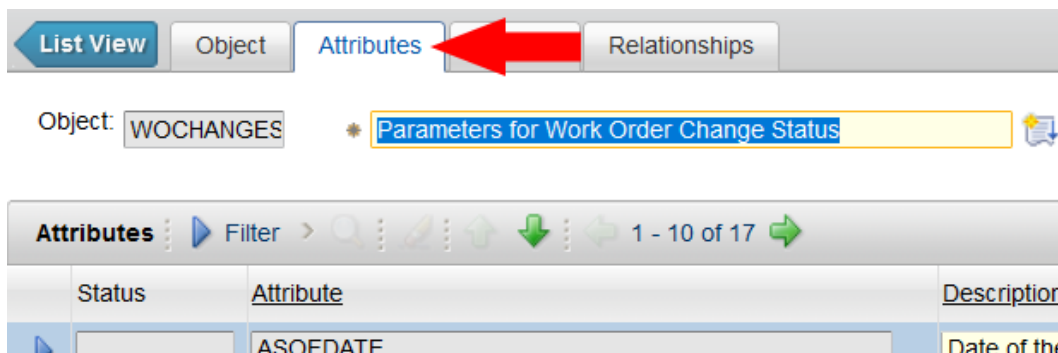
68. Go to the “System Configuration/Platform Configuration/Database Configuration” application and find the **WOCHANGESTATUS** object:



Status	Object	Description	Extension Table Name	Service	Description
	wochangestat				
	WOCHANGESTATUS	Parameters for Work Order Change Status		WORKORDER	Work Order

☐ Select Records

69. Click on the “Attributes” tab:

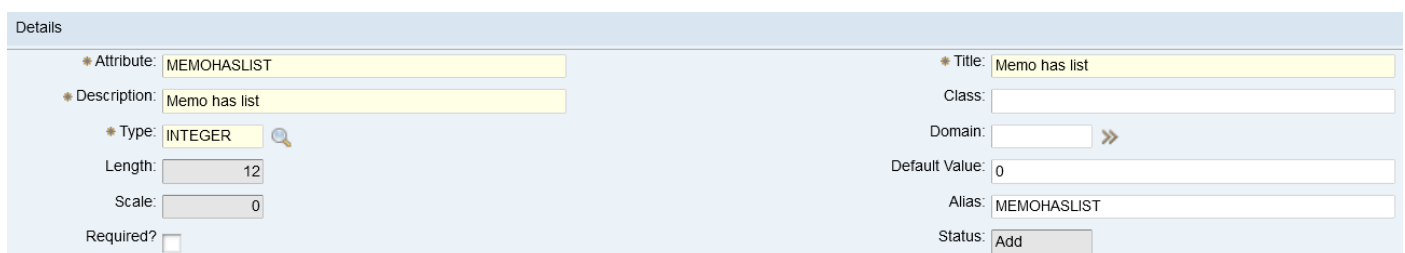


Object: WOCHANGES * Parameters for Work Order Change Status

Status	Attribute	Description
	ASOFDATE	Date of the

70. Then click on the “New Row” button and create a new attribute with the following details:

Attribute: MEMOHASLIST
Title: Memo has list
Description: Memo has list
Type: INTEGER
Default Value: 0



Details

* Attribute: MEMOHASLIST

* Description: Memo has list

* Type: INTEGER

Length: 12

Scale: 0

Required? ☐

* Title: Memo has list

Class:

Domain: >>

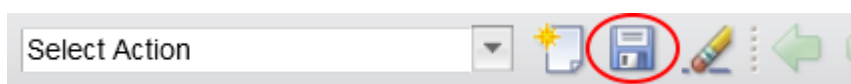
Default Value: 0

Alias: MEMOHASLIST

Status: Add

NOTE The WOCHANGESTATUS object is non-persistent, so this new attribute must be non-persistent as well.

71. Once you have entered all of the attribute details, click on the “Save” icon to save your changes:



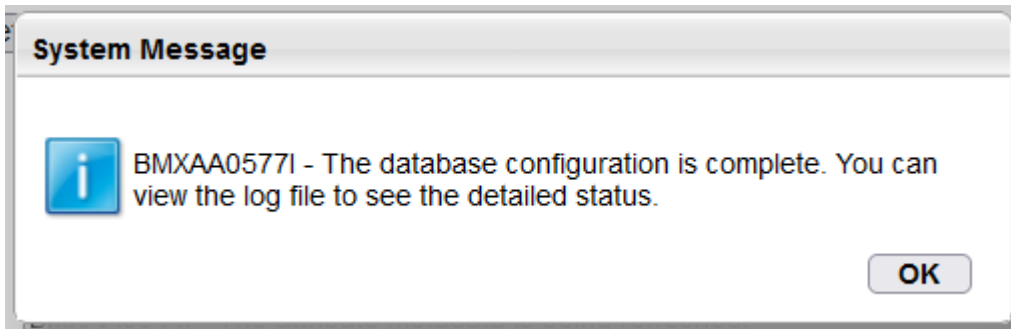
Select Action

72. Return to the main “Database Configuration” application page, you should see that the **WOCHANGESTATUS** object is now marked as having been changed (you may need to refresh the page):

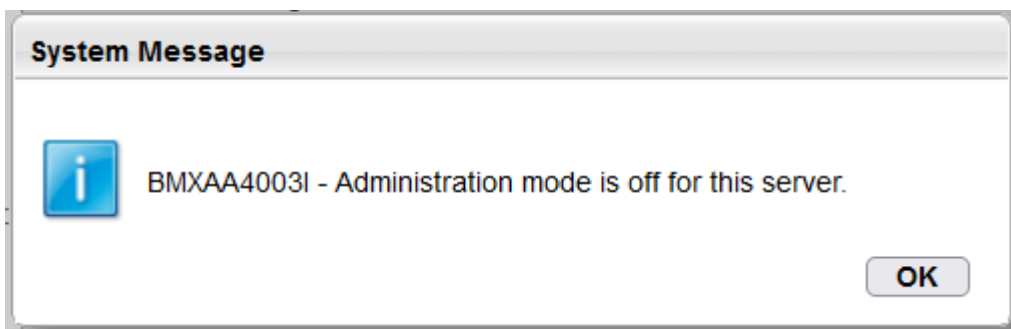
Status	Object	Description	Extension Table Name	Service	Description
To Be Changed	WOCHANGESTATUS	Parameters for Work Order Change Status		WORKORDER	Work Order

☐ Select Records

73. Put the server in to “Admin” mode and then “Apply Configuration Changes”. Once the changes have been applied, a message will be displayed:



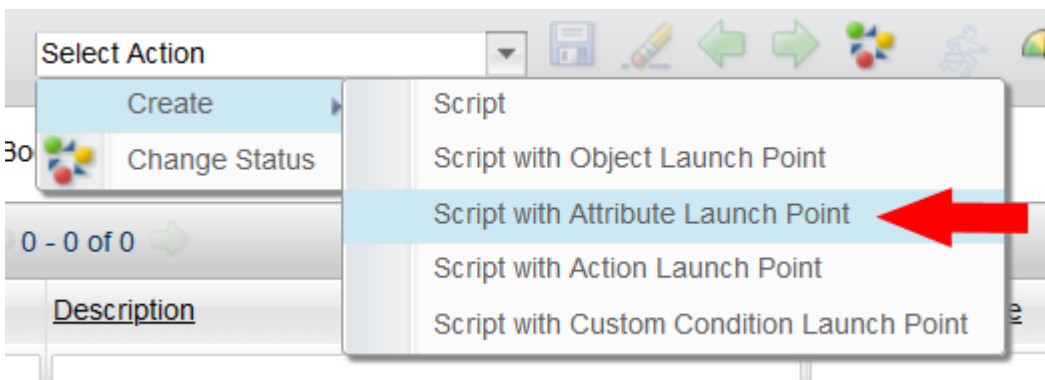
74. Make sure that you turn “Admin Mode” off once you are done!



Create Automation Script

75. Go to the “System Configuration/Platform Configuration/Automation Scripts” application:

76. Click on the “Select Action” menu and select the “Create Script with Attribute Launch Point” option:



77. In "Step 1", enter the launch point name / description and set the object and attribute values

Launch Point Name: MEMOHASLIST

Launch Point Description: Check WO Status to see if it has a memo lookup

Object: WOCHANGES

Attribute: STATUS

Events: Validate

Automation Scripts

Create Script with Attribute Launch Point : Step 1 of 3

Specify the object and the object attribute that launch the script. You can reuse an existing script or specify a new one. If you choose a new script, the wizard guides you through the script creation process. [More information](#)

Launch Point: MEMOHASLIST Check WO Status to see if it has a memo lookup Active? ☒

Object: WOCHANGES Attribute: STATUS

Events

Select the event for which you want to define the launch point. [More information](#)

☐ Initialize Access Restriction

☐ Initialize Value

☒ Validate

☐ Retrieve list

☐ Run action

Script

☒ New

☐ Existing: Script:

Cancel Next

78. Once you have entered the details, click on the "Next" button.

79. In "Step 2", enter the Script name and Description:

Script: MEMOHASLIST

Description: Check WO Status to see if it has a memo lookup

Automation Scripts

Create Script with Attribute Launch Point : Step 2 of 3

Launch Point: MEMOHASLIST Check WO Status to see if it has a memo lookup

Script: MEMOHASLIST Check WO Status to see if it has a memo lookup

Script Language: python

Object: WOCHANGES Log Level: ERROR

Import

You can import a script file that you created in another application or you can enter a script in the Source Code field in the next step.

Import a Script File: No file selected.

Variables

Variable	Variable Type	Binding Type	Binding Value	Override?
There are no rows to display.				

Download

Cancel Previous Next

80. Once you have entered the details, click on the “Next” button.

81. In “Step 3”, enter the script (as below):

The screenshot shows the 'Automation Scripts' window, specifically 'Step 3 of 3' for creating a script with an attribute launch point. The window has a title bar 'Automation Scripts' and a subtitle 'Create Script with Attribute Launch Point : Step 3 of 3'. Below the subtitle, there is a help icon and a message: 'You can enter a script in the Source Code field, or you can import a script file in the previous step.' The 'Launch Point' is set to 'MEMOHASLIST' and the description is 'Check WO Status to see if it has a memo lookup'. The 'Object' is 'WOCHANGES'. The 'Script' field contains the following Python code:

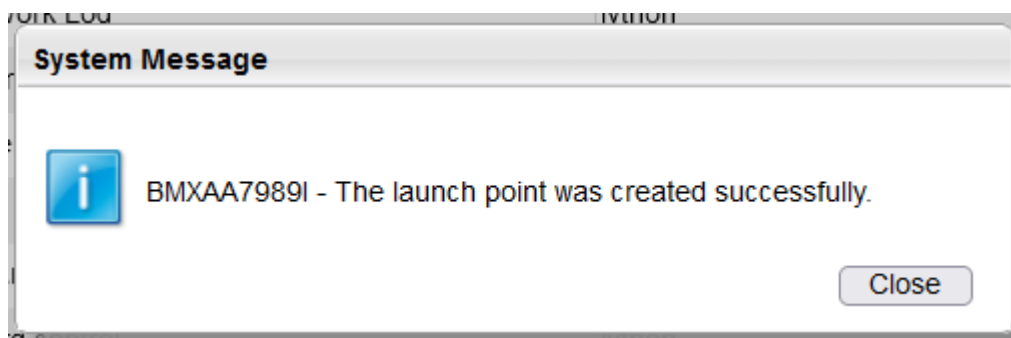
```
1 from psdi.mbo import MboConstants
2 from psdi.server import MXServer
3
4 def hasStatLookup(statusName):
5     retVal = True
6     statSet = MXServer.getMXServer().getMboSet("ALNDOMAIN", mbo.getUserInfo())
7     statSet.setWhere("domainid = '" + statusName + "REASON'")
8
9     cnt = statSet.count()
10    if cnt <= 1:
11        retVal = False
12
13    statSet.close()
14    return retVal
15
16 if hasStatLookup(mbo.getString("STATUS")):
17     mbo.setValue("MEMOHASLIST", 1, MboConstants.NOACCESSCHECK)
18
19 else:
20     mbo.setValue("MEMOHASLIST", 0, MboConstants.NOACCESSCHECK)
```

At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Create'.

NOTE You will notice that the above script is relying on our ALN Domains (for the memo reasons) being named consistently in the format of: **<STATUS VALUE>REASON**. E.g. **RESCHEDREASON**, **CANREASON** etc.

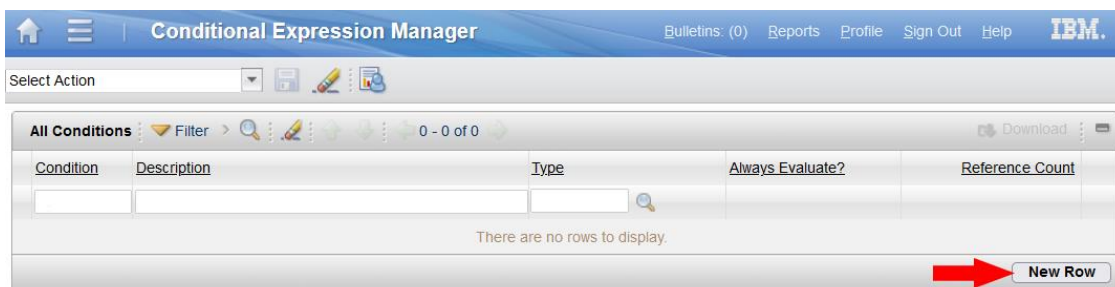
82. Click on the “Create” button to create and activate the script (you may need to scroll down to see the buttons).

83. Once the script has been created, a success message will be displayed:



Create Conditional Expressions

84. Go to the “Administration/Conditional Expression Manager” and click on the “New Row” button:



85. Create a condition called **MEMOSHOWLIST** with the following properties:

Condition: MEMOSHOWLIST

Description: Show the Memo Field WITH Domain List

Type: EXPRESSION

Expression: :memohaslist = 1

Always Evaluate: True

Details

Give the condition a name that will help you identify the condition when you apply it in the Security Groups ap conditions, the conditions are joined by an OR clause when they are evaluated.

* Condition: MEMOSHOWI Show the Memo Field WITH Domain List

* Type: EXPRESSION

* Expression: :memohaslist = 1

Class:

Always Evaluate? ☒

Reference Count: 0

86. Once you have entered the above properties, click on the “Save” icon to save the condition, then click on the “New Row” button to create a second condition called **MEMOSHOWNORM** with the following properties:

Condition: MEMOSHOWNORM

Description: Show the Memo Field WITHOUT Domain List

Type: EXPRESSION

Expression: :memohaslist = 0

Always Evaluate: True

Details

Give the condition a name that will help you identify the condition when you apply it in the Security Groups ap conditions, the conditions are joined by an OR clause when they are evaluated.

* Condition: MEMOSHOWI Show the Memo Field WITHOUT Domain List

* Type: EXPRESSION

* Expression: :memohaslist = 0

Class:

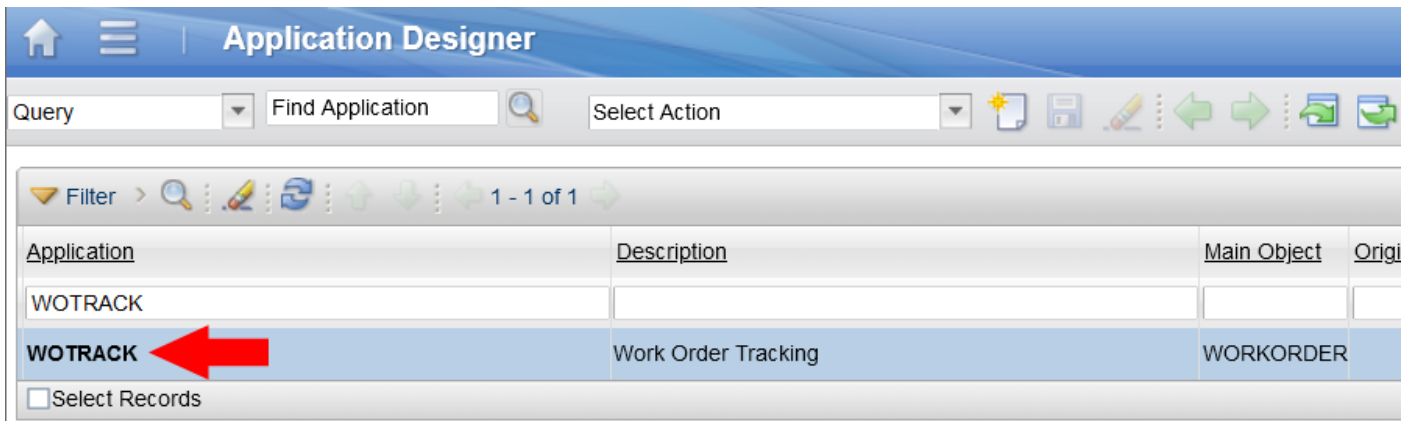
Always Evaluate? ☒

Reference Count: 0

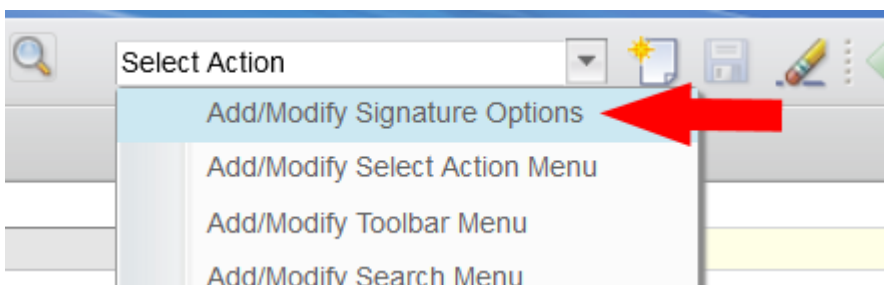
87. Once you have entered the above properties, click on the “Save” icon to save the condition.

Create Signature Options

88. Go to the “*System Configuration/Platform Configuration/Application Designer*” application, then find and open the **WOTRACK** application:



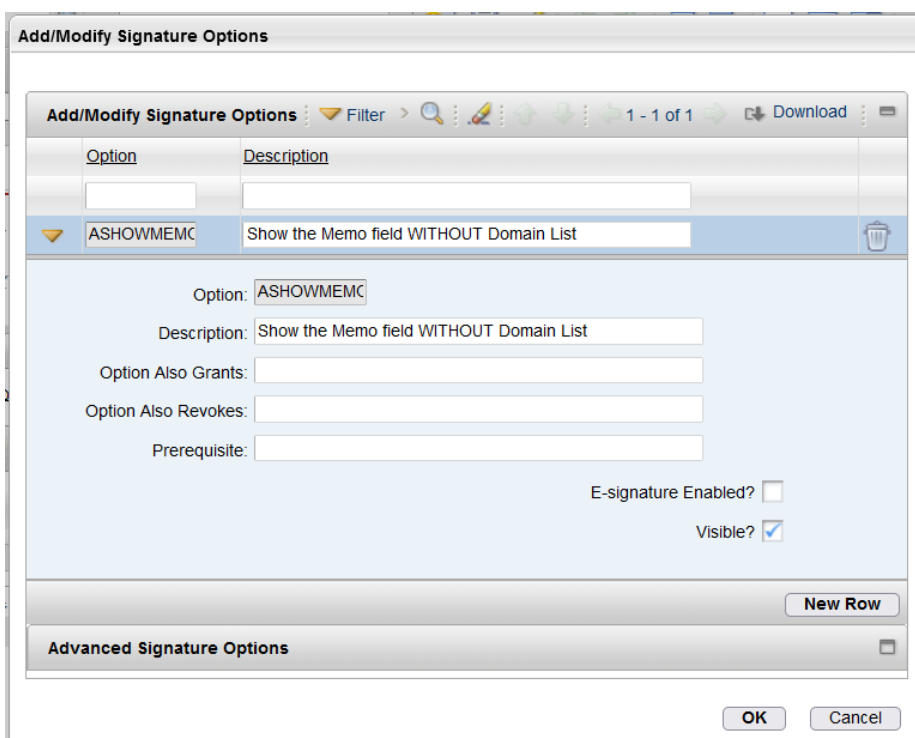
89. Click on “*Select Action*” and choose the “*Add/Modify Signature Options*” option:



90. Click on the “*New Row*” button, and create a new signature option called **ASHOWMEMO** with the following properties:

Option: ASHOWMENU

Description: Show the Memo field WITHOUT Domain List



91. Once you have set the above properties, click on the “New Row” button to create another signature option called **BSHOWMEMO** with the following properties:

Option: BSHOWMENU

Description: Show the Memo field WITH Domain List

Add/Modify Signature Options

Option	Description
BSHOW	
BSHOWMEMO	Show the Memo field WITH Domain List

Option: BSHOWMEMO
Description: Show the Memo field WITH Domain List
Option Also Grants:
Option Also Revokes:
Prerequisite:
E-signature Enabled? ☐
Visible? ☒

New Row

Advanced Signature Options ☐

OK Cancel

92. Once you have set the above properties, click on the “OK” button to return to the “Application Designer” window.

NOTE You may need to log out of Maximo and restart all JVMs to make sure that you can see everything in the next steps...

Setting up the security group and conditions

93. Go to the “Security/Security Groups” application.
94. Find the “EVERYONE” group and click the “Applications” tab:

Security Groups

Query Find Group Select Action

Group	Description	Independent of Other Groups?
everyone		
EVERYONE	All Maximo Users	<input type="checkbox"/>
MAXEVERYONE	All Maximo Users	<input type="checkbox"/>

Select Records

95. In the “Applications” section, find and select the “Work Order Tracking” application:

Description	Application Type
work order tracking	
Work Order Tracking	Application
Work Order Tracking (T&D)	Application

96. In the bottom section, find the two signature options that you created previously:

Description
memo
Show the Memo field WITH Domain List
Show the Memo field WITHOUT Domain List

97. Open the “Show the Memo field WITH Domain List” option and set the properties as follows:

Grant Access: True

Condition: MEMOSHOWLIST

Details

Description: Show the Memo field WITH Doma

Grant Access? ☒

Condition: MEMOSHOWLIST » Show the Memo Field WITH Domain List

Type: EXPRESSION

Expression: :memohaslist = 1

Condition Class:

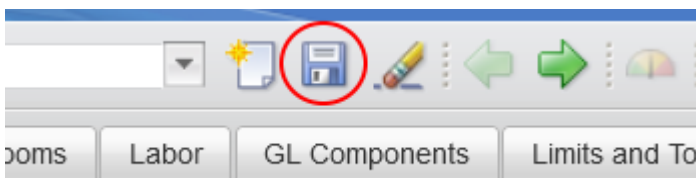
98. Open the “Show the Memo field WITHOUT Domain List” option and set the properties as follows:

Grant Access: True

Condition: MEMOSHOWNORM

The screenshot shows a software interface with a top toolbar containing icons for Filter, Search, Edit, Up, Down, and a status bar indicating '1 - 2 of 2'. Below the toolbar is a list of conditions. The first condition is 'Show the Memo field WITH Domain List'. The second condition, 'Show the Memo field WITHOUT Domain List', is selected and highlighted in blue. Below the list is a 'Details' section for the selected condition. The 'Description' field contains 'Show the Memo field WITHOUT'. The 'Grant Access?' checkbox is checked. The 'Condition' field contains 'MEMOSHOWI' followed by a right-pointing arrow and a text box containing 'Show the Memo Field WITHOUT Domain List'. The 'Type' field contains 'EXPRESSION'. The 'Expression' field contains ':memohaslist = 0'. The 'Condition Class' field is empty.

99. Once you have setup the properties for both of the conditions, save your changes by clicking on the “Save” icon at the top of the screen:

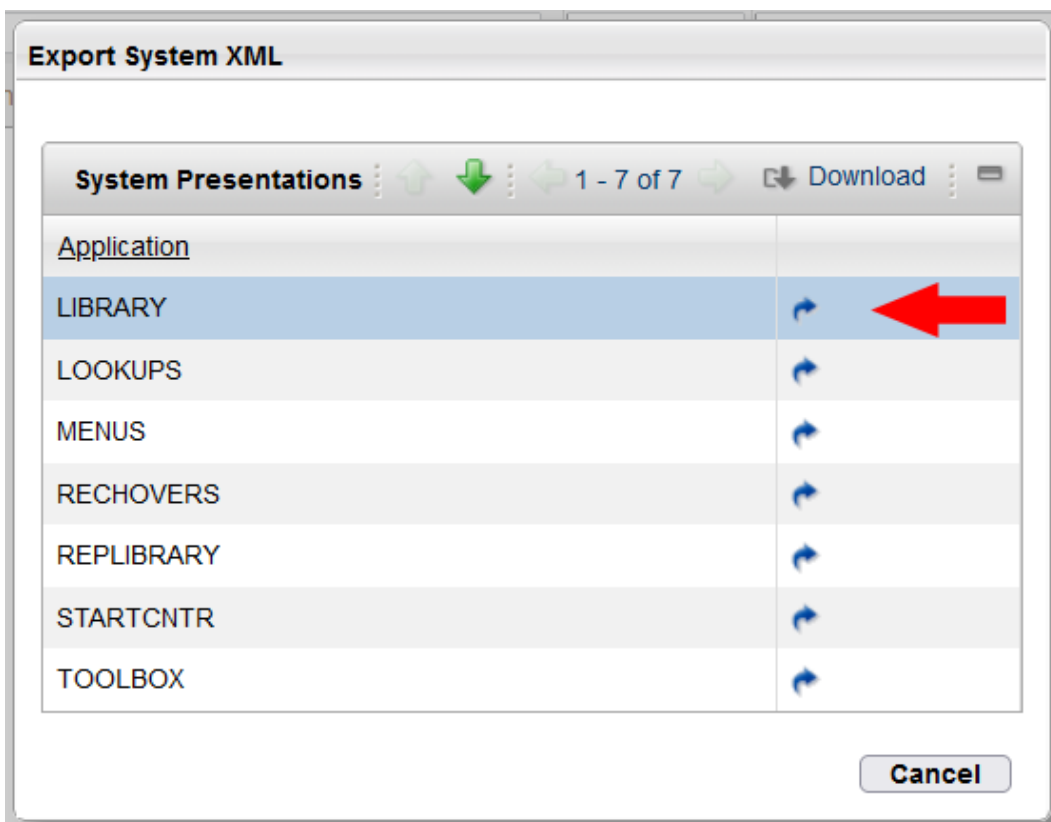


Modify the System Presentation File

100. Go to the "System Configuration/Platform Configuration/Application Designer" application.
101. Click on the "Select Action" drop down and select the "Export System XML" option:



102. Export the **LIBRARY** presentation:



103. Save the file to your local machine and then open it in a text editor.
104. Search for the section that starts with:

`<dialog beaclass="psdi.webclient.beans.workorder.WOChangeStatusBean" id="status" label="Change Status" relationship="WOChangeStatus" savemode="ONLOADUNLOAD">`

```
<dialog beaclass="psdi.webclient.beans.workorder.WOChangeStatusBean" id="status" label="Change Status" relationship="WOChangeStatus" savemode="ONLOADUNLOAD">  
  <section id="changestatus_grid1">  
    <sectionrow id="changestatus_grid1_1">
```

Once you have found it, look for the following line within that section:

```
<textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" lookup="woreschedmemo" sigoption="MEMOBELOWSTATUS"/>
```

```
<section id="changestatus_grid1_1_1_grid4">
  <textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3b" sigoption="MEMOABOVESTATUS"/>
  <combobox dataattribute="status" id="changestatus_grid1_1_1_grid4_1" smartfilloff="true"/>
  <textbox dataattribute="AsOfDate" id="changestatus_grid1_1_1_grid4_2" lookup="datelookup"/>
  <textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" lookup="woreschedmemo" sigoption="MEMOBELOWSTATUS"/>
  <checkbox dataattribute="printreport" id="changestatus_grid1_1_1_grid5_1"/>
  <checkbox dataattribute="async" id="changestatus_grid1_1_1_grid5_1b"/>
  <textbox dataattribute="toemailaddr" id="changestatus_grid1_1_1_grid5_1c"/>
</section>
```

You will need to change the reference to the sigoption as follows:

```
<textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" lookup="woreschedmemo" sigoption="BSHOWMEMO"/>
```

```
<section id="changestatus_grid1_1_1_grid4">
  <textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3b" sigoption="MEMOABOVESTATUS"/>
  <combobox dataattribute="status" id="changestatus_grid1_1_1_grid4_1" smartfilloff="true"/>
  <textbox dataattribute="AsOfDate" id="changestatus_grid1_1_1_grid4_2" lookup="datelookup"/>
  <textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" lookup="woreschedmemo" sigoption="BSHOWMEMO"/>
  <checkbox dataattribute="printreport" id="changestatus_grid1_1_1_grid5_1"/>
  <checkbox dataattribute="async" id="changestatus_grid1_1_1_grid5_1b"/>
  <textbox dataattribute="toemailaddr" id="changestatus_grid1_1_1_grid5_1c"/>
</section>
```

Now repurpose (so long as you don't use it, or create another entry if you do) the "Memo" field with the sigoption of "MEMOABOVESTATUS":

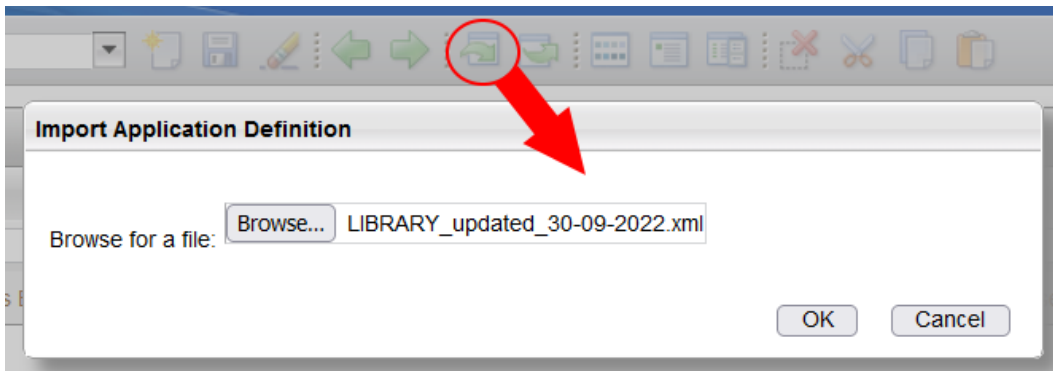
```
<section id="changestatus_grid1_1_1_grid4">
  <textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3b" sigoption="MEMOABOVESTATUS"/>
  <combobox dataattribute="status" id="changestatus_grid1_1_1_grid4_1" smartfilloff="true"/>
  <textbox dataattribute="AsOfDate" id="changestatus_grid1_1_1_grid4_2" lookup="datelookup"/>
  <textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" lookup="woreschedmemo" sigoption="BSHOWMEMO"/>
  <checkbox dataattribute="printreport" id="changestatus_grid1_1_1_grid5_1"/>
  <checkbox dataattribute="async" id="changestatus_grid1_1_1_grid5_1b"/>
  <textbox dataattribute="toemailaddr" id="changestatus_grid1_1_1_grid5_1c"/>
</section>
```

Move this line to directly above the other "Memo" field and change the sigoption to "ASHOWMEMO":

```
<section id="changestatus_grid1_1_1_grid4">
  <combobox dataattribute="status" id="changestatus_grid1_1_1_grid4_1" smartfilloff="true"/>
  <textbox dataattribute="AsOfDate" id="changestatus_grid1_1_1_grid4_2" lookup="datelookup"/>
  <textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3b" sigoption="ASHOWMEMO"/>
  <textbox dataattribute="Memo" id="changestatus_grid1_1_1_grid4_3a" lookup="woreschedmemo" sigoption="BSHOWMEMO"/>
  <checkbox dataattribute="printreport" id="changestatus_grid1_1_1_grid5_1"/>
  <checkbox dataattribute="async" id="changestatus_grid1_1_1_grid5_1b"/>
  <textbox dataattribute="toemailaddr" id="changestatus_grid1_1_1_grid5_1c"/>
</section>
```

NOTE We do not use the functionality provided by the MEMOABOVESTATUS/MEMOBELOWSTATUS signature options and prefer the "Memo" field to always appear in the same place. Also, your *id* values may be different to the ones shown above!

105. Save your changes to the LIBRARY.xml file, then import it back into Maximo:

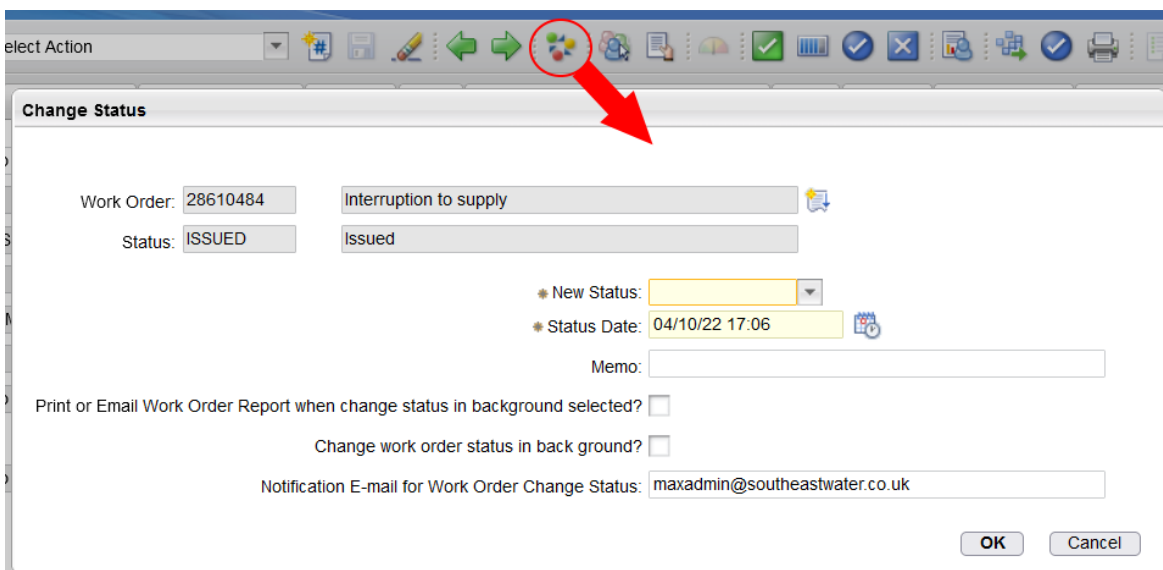


106. Once the file has been imported, log out of Maximo and restart the server (all JVMs!) to make sure that your changes have been correctly applied.


Testing that it all works

107. Go to the "Work Order Tracking" application and select a work order where you can change the status to "Rescheduled".

108. Click on the "Change Status" icon:



109. You should see that the Memo field is as per standard, i.e. the domain popup icon isn't visible and the field is not mandatory (as below):

Status Date: 04/10/22 17:11 

Memo:

selected? ☐

110. Select a status other than “Rescheduled” for the “New Status” E.g. “Approved”, and you should see that the “Memo” field should remain as per normal:

* New Status:

* Status Date:

Memo:

ground selected? ☐

111. Now select “Rescheduled” as the “New Status”, you will see that both the mandatory icon and the domain popup icon are now visible (as below):

* New Status:

* Status Date:

* Memo:

ground selected? ☐

112. Click on the “Magnifying Glass” icon and you will see that the domain that was configured for the “Rescheduled Reasons” is now displayed (as below):

The screenshot shows a software interface with a 'Select Value' popup window. The main window has fields for 'New Status' (set to 'Rescheduled'), 'Status Date' (04/10/22 17:11), and 'Memo'. A red circle highlights the 'New Status' dropdown. A red arrow points from a magnifying glass icon in the 'Memo' field to the 'Select Value' popup. The popup shows a list of reasons for rescheduling, with 'PARKED CARS' highlighted.

Description
PARKED CARS
SLEEP TIME, SICK, NO MATE
ADDITIONAL PLANT / EQUIPMENT REQUIRED
PLANNER MISSED INFO, NPC NOT PUT OUT, GANG MISSED INFO
REFUSAL, NO ONE HOME, UNABLE TO CARRY OUT WORKS
CUSTOMER ISSUE
DONE ON ARRIVAL
VAN BROKEN DOWN, EQUIPMENT BROKEN, FITTINGS