

Use Default Control Group when Creating As-Built Records

Overview

Historically, when records are created in As-Built as part of an inventory or work order (WO) issue, no useful information is included regarding who will have authority to work with that record. In the case of WOs, the **Workflow Owner** field contains the name of the user who performed the issue; but this is typically an individual working in inventory or production, and not someone who will actually manage the part in As-Built.

To resolve this situation, a default control group can be set up for the inventory subgroup that controls the part or parts that will appear in As-Built as a way of establishing authority on the record.

Details

- On the *Val. Inventory Subgroup Detail* screen, there is now a **Default Control Group for CM Controlled** field. The Info icon included contains the following information: “Only control groups that include permissions in the As-Built module are listed here. The control group selected will be used on any As-Built records tied to this subgroup.” *
- Directly above the field just described, there is a radio button labeled **Is this Subgroup CM Controlled**. If you want to use this new functionality, then be sure to check this as **Yes**.
- As described, only control groups with permissions in the As-Built module are included in the List of Values for the default control group field.
- When a *serialized* inventory part is issued from Inv. Master using the **Issue** link, if the subgroup controlling that part is CM Controlled and uses the **Default Control Group for CM** field, that control group will auto-populate the **Control Group** field on the *As-Built Part Detail* screen (see screen captures below).
- This same process holds true for items that have been gained to As-Built through build work orders.

Other Items to Remember

- The spreadsheet for the *Val. Inventory Subgroup Import* now includes a column to indicate whether or not the new subgroup is **CM Controlled**, and a second column to indicate what the **Default Control Group for CM Controlled** control group should be. Neither column is required.

- For this functionality to work properly, parts issued directly from Inventory Master or from a build work order must be serialized.
- This functionality is optional, intended to provide a way to better manage As-Built record authority. It is the site's discretion as to whether or not this new feature will be used.
- As-Built records entered manually can also be populated directly with a control group in the **Control Group** field with any control group that has permissions associated with the As-Built module.

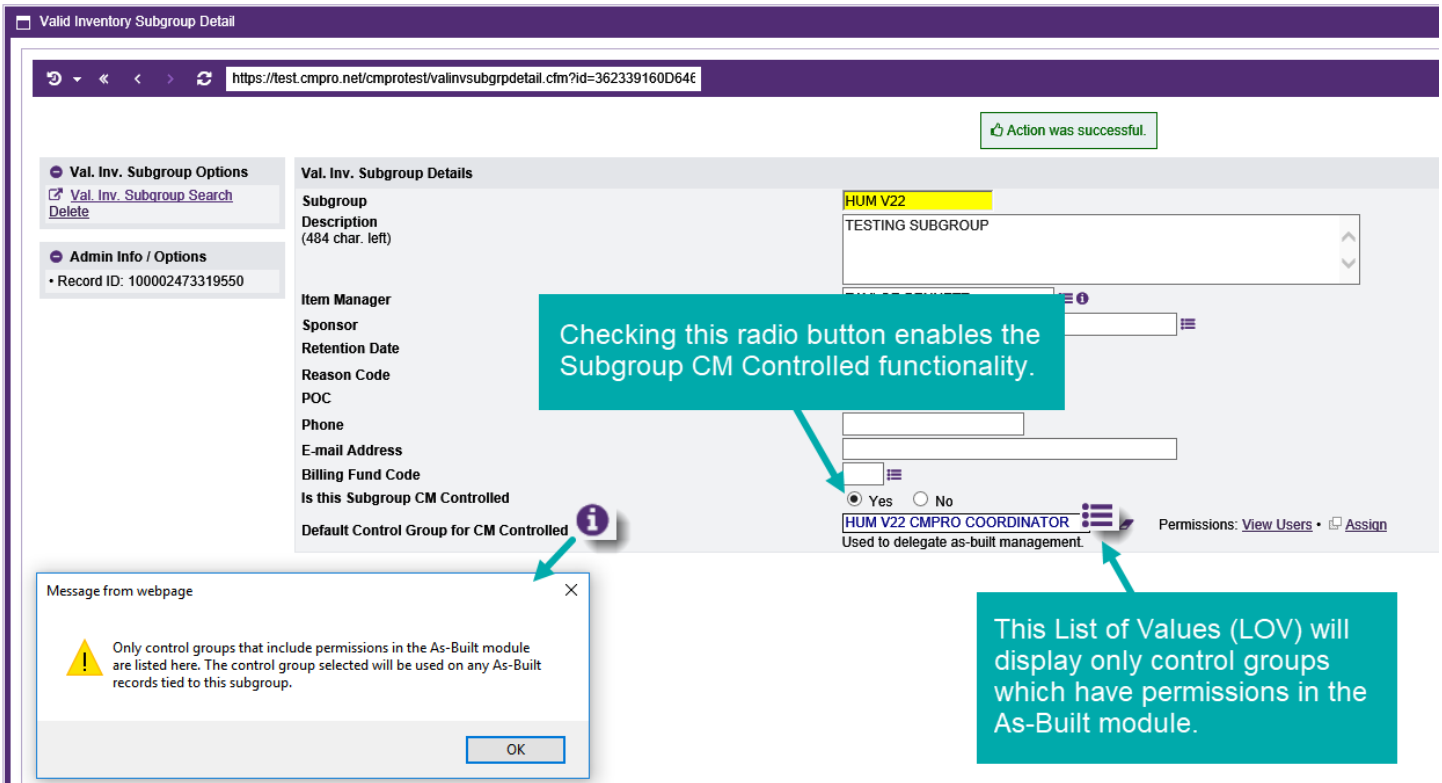
* See CHG2017015 for details regarding As-Built module permissions.

Availability

The changes described herein will be available with C-BN-0117.

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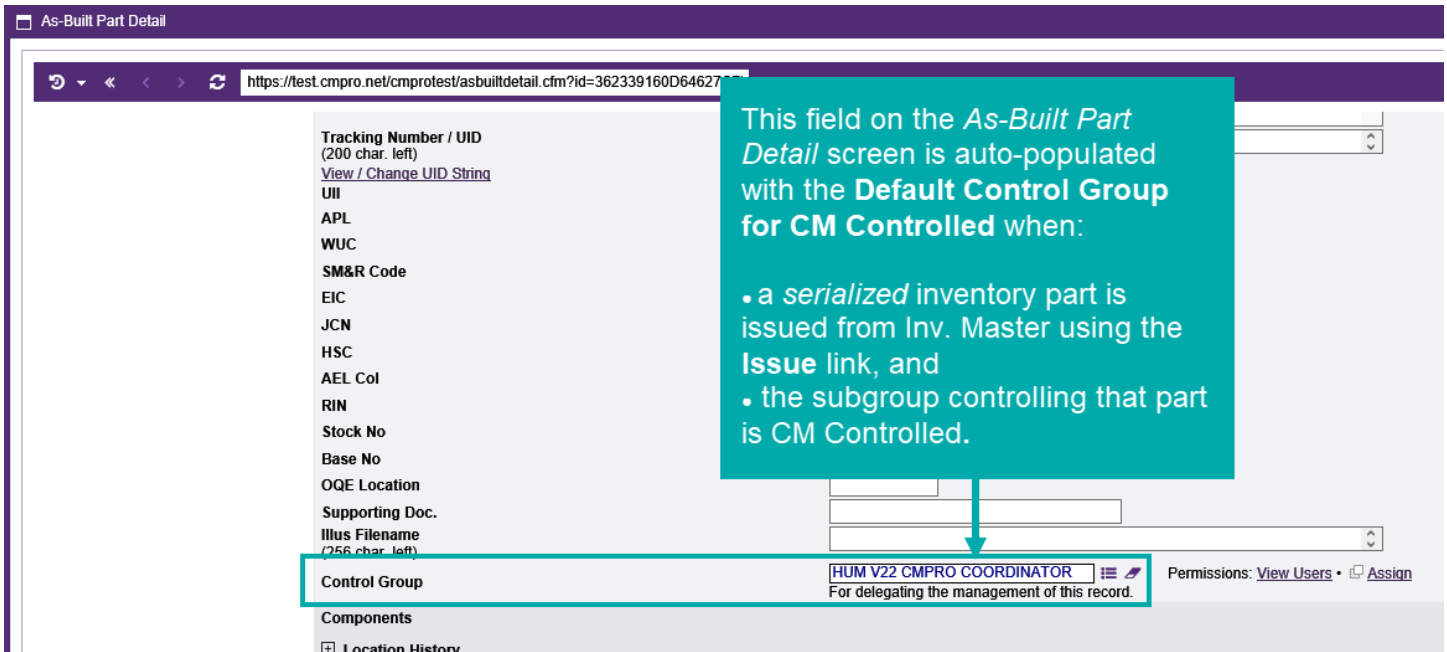
Screen Captures and Elements



The screenshot shows the 'Valid Inventory Subgroup Detail' screen. A green notification box at the top right says 'Action was successful.' The main form area includes a 'Subgroup' dropdown menu with 'HUM V22' selected and 'TESTING SUBGROUP' as the description. Below this, there are radio buttons for 'Is this Subgroup CM Controlled', with 'Yes' selected. A teal callout box points to these radio buttons with the text: 'Checking this radio button enables the Subgroup CM Controlled functionality.' Below the radio buttons is a dropdown menu for 'Default Control Group for CM Controlled' with 'HUM V22 CMPRO COORDINATOR' selected. A teal callout box points to this dropdown with the text: 'This List of Values (LOV) will display only control groups which have permissions in the As-Built module.' A message box at the bottom left contains a warning icon and the text: 'Only control groups that include permissions in the As-Built module are listed here. The control group selected will be used on any As-Built records tied to this subgroup.' Other fields include 'Item Manager', 'Sponsor', 'Retention Date', 'Reason Code', 'POC', 'Phone', 'E-mail Address', and 'Billing Fund Code'. A 'Permissions' section at the bottom right shows 'View Users' and 'Assign' options.

Valid Inventory Subgroup Detail Screen with Default Control Group for CM Controlled Displayed

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The screenshot shows the 'As-Built Part Detail' screen. A teal callout box contains the following text:

This field on the *As-Built Part Detail* screen is auto-populated with the **Default Control Group for CM Controlled** when:

- a *serialized* inventory part is issued from Inv. Master using the **Issue** link, and
- the subgroup controlling that part is CM Controlled.

An arrow points from the callout box to the 'Control Group' field, which is highlighted with a teal border and contains the text 'HUM V22 CMPRO COORDINATOR'. Below the field, it says 'For delegating the management of this record.' To the right of the field, there are permissions: 'View Users' and 'Assign'.

The Control Group Field Auto-Populated with Default Control Group for CM Controlled