Compliance Management

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Chapter 1

Overview

Topics:

- Overview of the Compliance Management Module
- Access Compliance Management
- Compliance Management Workflow

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Overview of the Compliance Management Module

Depending on your geographical location, regulatory bodies and industry authorities have different standards for inspections on various pieces of equipment. Many dictate when and how often equipment should be inspected. To integrate these requirements with APM, you can use the Compliance Management module to track when your equipment should be inspected to comply with these standards.

More Details

Compliance Management functionality is fully integrated with Inspection Management to allow you to manage reoccurring Inspection Tasks.

Access Compliance Management

Procedure

In the module navigation menu, select **Integrity** > **Compliance Management**.

Results

The **Compliance Management Overview** page appears, displaying the following information:

- The **Assets without Templates** section: Contains a list of assets that do not have linked Compliance Strategy Templates and match query results for any queries in Compliance Strategy Templates.
- The **Assets without Inspection Plans** section: Contains a list of assets that do not have associated Inspection Plans. The assets in this section have linked Compliance Strategy Templates.
- The **Assets with Inspection Plans** section: Contains a list of assets that have an associated Inspection Plan and linked Compliance Strategy Template.
- The **Inspection Plan Summary** widget: Contains a graph of Inspection Plans, grouped by state.
- The **Active Recommendation Summary** widget: Contains a graph of Compliance Recommendations from Inspection Plans that are in the Approved state.
- The **Compliance Templates** widget: Contains a list of Compliance Strategy Templates.

Note: The **Compliance Management Overview** page is not updated automatically when you return to the previously opened tab. You can select Refresh ( ) button to update the page.

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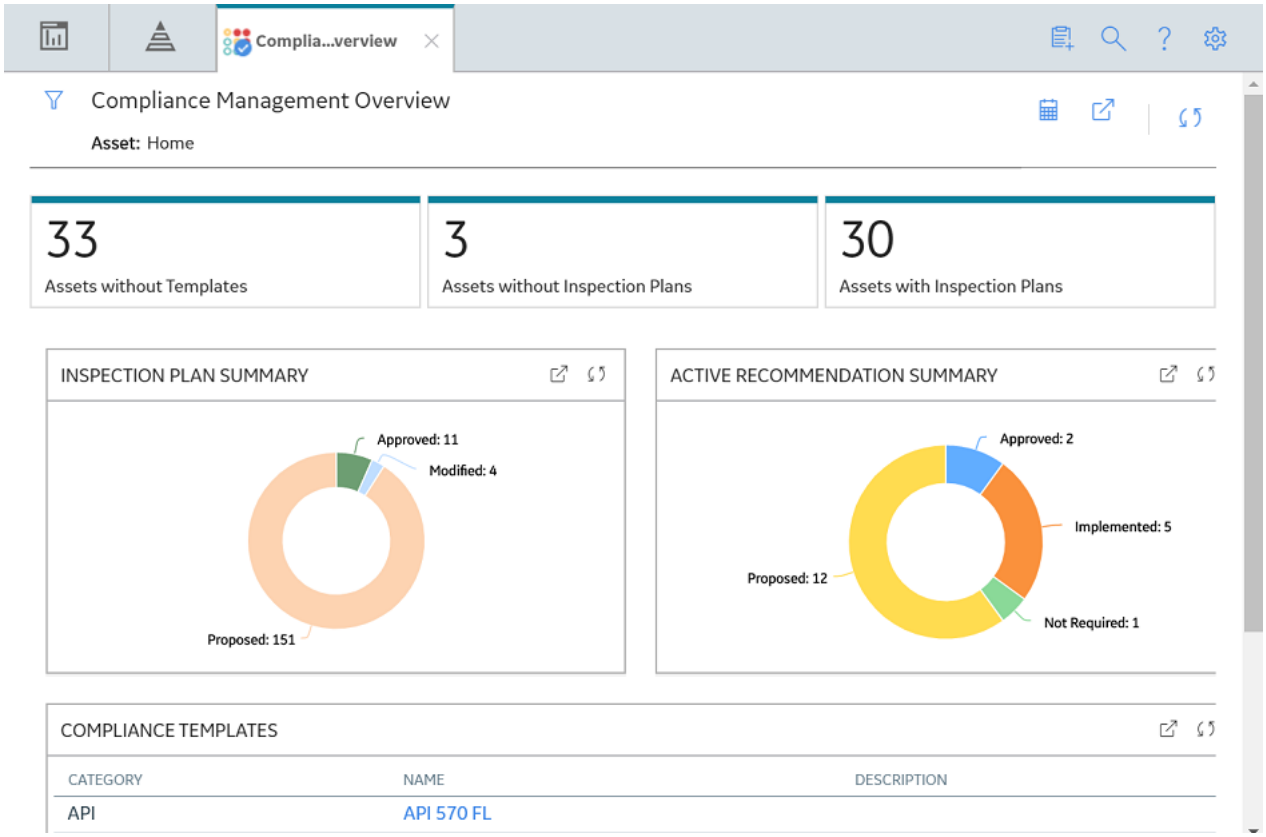

Compliance Management Workflow

This workflow provides the basic, high-level steps for using this module. The steps and links in this workflow do not necessarily reference every possible procedure.

1. Access the Compliance Management administrative features.
2. Create a Compliance Strategy Template.
3. Map a policy to a Compliance Strategy Template.
4. Add assets to the Compliance Strategy Template.
5. Suggest Compliance Strategy Templates for assets without templates.
6. Apply suggested Compliance Strategy Templates to assets without templates.
7. Create an Inspection Plan.
8. Review the Inspection Plan and Compliance Strategy Recommendations.
9. Approve an Inspection Plan.
10. Link an Inspection Task to a Compliance Recommendation.

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Chapter 2

Workflows

Topics:

- Compliance Strategy Template Workflow
- Compliance Management Workflow
- Recommendation Implementation

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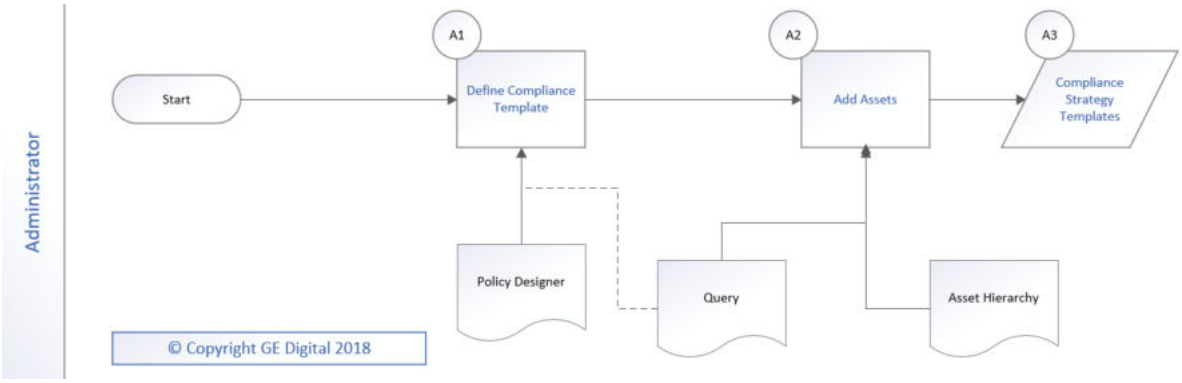
Compliance Strategy Template Workflow

Compliance Management: Compliance Strategy Template Workflow

This workflow details the process for managing Compliance Strategy Templates for Compliance Management.

In the following workflow diagram, the blue text in a shape indicates that a corresponding description has been provided in the sections that follow the diagram. For more information, refer to the topic Interpreting the Workflow Diagrams.



Define Compliance Template

Persona: Administrator

Create a Compliance Strategy Template that has a linked policy.

Add Assets

Persona: Administrator

Add assets to the Compliance Strategy Template using a query or by selecting assets.

Compliance Strategy Templates

Persona: Administrator

Review the created Compliance Strategy Templates.

Compliance Management Workflow

Compliance Management: Compliance Management Workflow

This workflow details the process for managing assets and Inspection Plans for Compliance Management.

In the following workflow diagram, the blue text in a shape indicates that a corresponding description has been provided in the sections that follow the diagram. For more information, refer to the topic Interpreting the Workflow Diagrams.

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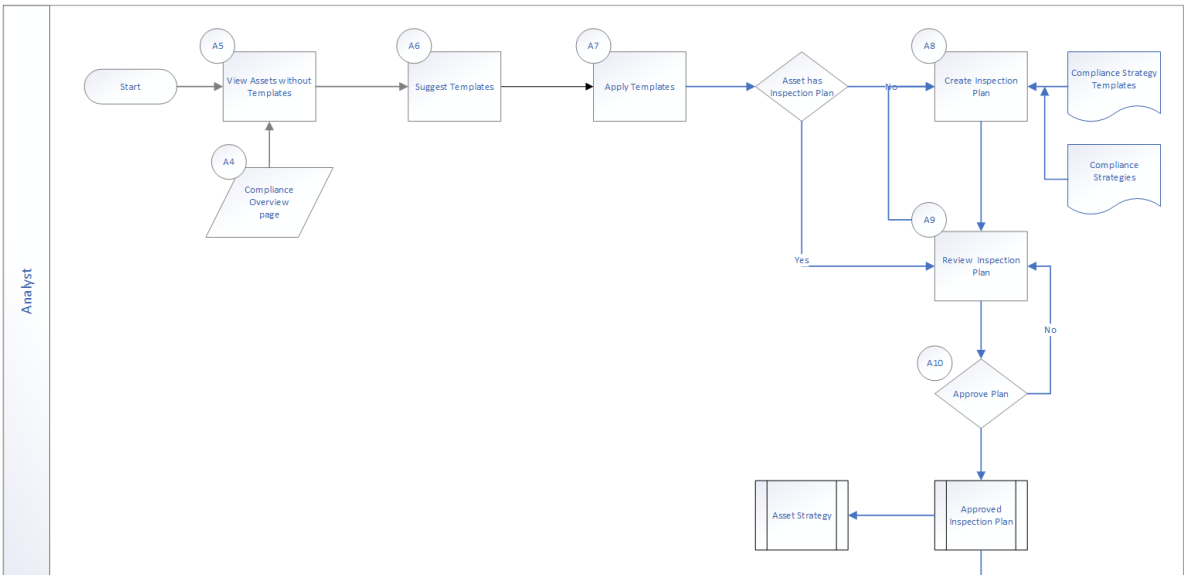

View Assets without Templates

Persona: Analyst

Review assets that do not have linked Compliance Strategy Templates.

Suggest Templates

Persona: Analyst

Get a list of assets that do not have assigned Compliance Strategy Templates. The list of assets has suggested Compliance Strategy Templates.

Apply Templates

Persona: Analyst

Apply suggested Compliance Strategy Templates to assets without templates.

Assets has Inspection Plan?

Persona: Analyst

Determine if assets with linked Compliance Strategy Templates have Inspection Plans.

Create Inspection Plan

Persona: Analyst

Create an Inspection Plan for an asset.

Review Inspection Plan

Persona: Analyst

Review the Inspection Plan and modify Compliance Recommendations.

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Approve Plan?

Persona: Analyst

Determine if the Inspection Plan is ready to be approved.

Approved Inspection Plan

Persona: Analyst

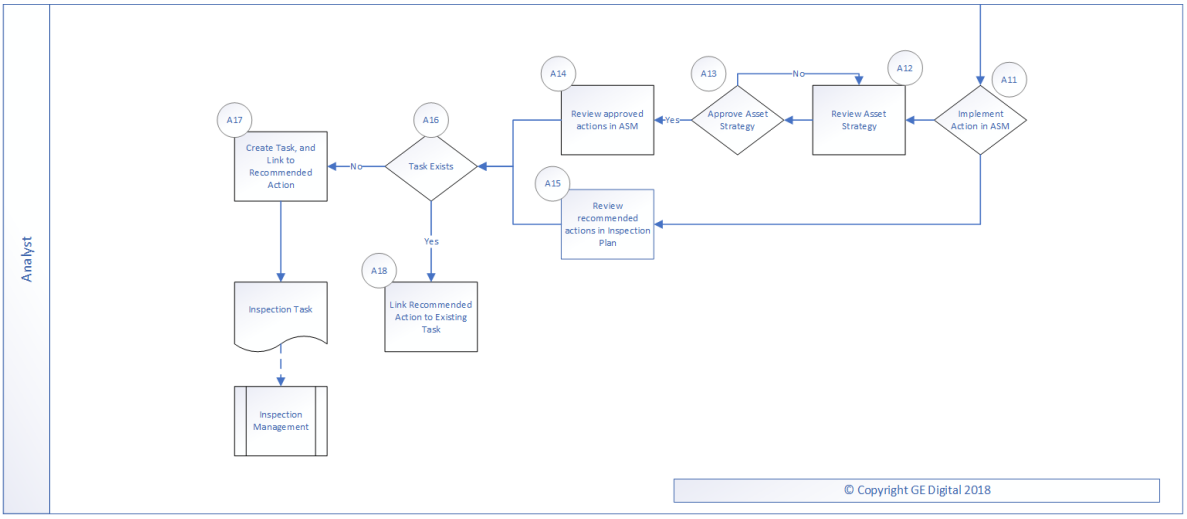
After the Inspection Plan is approved, the recommendations that are in the Approved state can be implemented as Inspection Tasks in the **Asset Strategy Management** page or in the **Inspection Plan** page.

Recommendation Implementation

Recommendation Implementation

This workflow describes the process of the below mentioned tasks.

- Reviewing the recommendations linked to an Asset
- Deciding whether to implement the recommended action in Inspection Plan or Asset Strategy Manager
- Reviewing the inspection tasks linked to an Asset
- Modifying or creating tasks.



Implement Action in ASM

Persona: Analyst

After you approve the Inspection Plan, you can implement the Compliance Recommendation to Task in Asset Strategy or in Inspection Plan. This decision needs to be made by the owner operator, depending on the corporate philosophy of implementing Strategy recommendations.

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Review Asset Strategy

Persona: Analyst

After you approve an Inspection Plan, an Asset Strategy is created or updated for the asset. The Compliance recommendations linked to the asset are converted into actions. Review the Actions created in Asset Strategy Management.

Approve Asset Strategy

Persona: Analyst

Once you review the actions and it is ready for implementation, you must approve the Asset Strategy to change its status to Active.

Review Approved Recommendations

Persona: Analyst

Review the approved Compliance Recommendations in the inspection plan, if you decide to implement through Inspection Plan and not through Asset Strategy Manager.

Review Approved Actions

Persona: Analyst

If you decide to implement Compliance sourced actions in Asset Strategy Manager, review the approved actions to evaluate implementation options.

Link Recommendation to Existing Task

Persona: Analyst

If an existing Inspection Task provides the same instructions as a Compliance Recommendation, link the Recommendation to an existing Task. You can modify the Task if needed. You can link only one Inspection Task to a Recommendation. You can similarly link Compliance sourced action to an existing task if you choose to implement from Asset Strategy Manager.

Create New Task and Link to Action

Persona: Analyst

If an appropriate task does not exist, create a new task to implement the Compliance Recommendation. The newly created Task will be populated with the appropriate information from the Compliance Recommendation. Similarly you can create a new Inspection Task from Asset Strategy Manager to implement the Compliance sourced action and the newly created Task will be populated with appropriate information from the Compliance sourced action.

Inspection Tasks

Persona: Analyst

The asset strategy may be implemented as Tasks that have been defined directly from Actions in the asset strategy or recommendations in the Inspection Plan for an asset. These Tasks are typically managed in the Inspection Management or Thickness Monitoring module.

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Chapter 3

Inspection Plans

Topics:

- About Inspection Plans
- About Inspection Plan Approval
- About Modifying Compliance Recommendations on an Inspection Plan
- Access an Inspection Plan
- Create an Inspection Plan from the Compliance Management Overview Page
- Create an Inspection Plan for any Asset Using the Asset Hierarchy
- Update Compliance Recommendations for an Inspection Plan
- Approve an Inspection Plan
- Delete an Inspection Plan

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About Inspection Plans

An Inspection Plan can be created from any asset that is linked to a Compliance Strategy Template and meets the requirements of Compliance Strategy records in the policy that is associated with the Compliance Strategy Template.

When an MI Compliance Administrator creates a Compliance Strategy Template, the completed template has linked assets. From this point, an MI Compliance Analyst or MI Inspection Plan Approver can generate an Inspection Plan based on the policy that is mapped to the Compliance Strategy Template. Alternatively, users can get suggested Compliance Strategy Templates for assets; MI Compliance Analysts can apply Compliance Strategy Templates to these assets and create Inspection Plans from the **Compliance Management Overview** page. An Inspection Plan is attached to the asset from which it is generated, and the user can view the details of the Inspection Plan from Compliance Management. The Inspection Plan contains Compliance Recommendations and displays Inspection Tasks for an asset.

When the Inspection Plan is moved to the Approved state by an MI Inspection Plan Approver, users then can create or link an Inspection Task to the Compliance Recommendation. When the Compliance Recommendations have Inspection Tasks linked, the Inspection Plan is fully integrated with the Inspection Management module.

For more information on Security Roles and Inspection Plans, see Compliance Management Security Roles.

About Inspection Plan Approval

An MI Inspection Plan Approver can approve Inspection Plans that are created by the MI Compliance Analyst. Approving an Inspection Plan will also integrate the related asset with Asset Strategy Manager (ASM).

Compliance Recommendations are used to create Actions. For more information on ASM Integration, see, About Asset Strategy Management (ASM) Integration.

MI Compliance Analysts can review and modify the Inspection Plan if more changes are needed.

After an Inspection Plan is created, the MI Inspection Plan Approver and MI Compliance Analysts can review the plan and modify existing Compliance Recommendations. The MI Inspection Plan Approver can move the Inspection Plan to the Approved state.

When the Inspection Plan is in the Approved state, users can create or link Inspection Tasks to the Compliance Recommendations based on the application setting. If the MI Inspection Plan Approver or an MI Compliance Analyst is no longer satisfied by the items contained in the Inspection Plan, they can update the Inspection Plan, which moves the Inspection Plan back to the Modified state. The MI Inspection Plan Approver can then delete, mark as not required, or supersede Compliance Recommendations.

Each time the Inspection Plan is changed from the Approved to the Modified state, an Inspection Plan Revision record is created and linked to the existing Inspection Plan. For each existing Compliance Recommendation record, a Recommendation Revision record is created and linked to the Inspection Plan Revision.

In addition, the Inspection Plan must be returned to the Approved state by the MI Inspection Plan Approver before they can re-promote it to ASM.

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About Modifying Compliance Recommendations on an Inspection Plan

An MI Compliance Analyst or MI Inspection Plan Approver can modify Compliance Recommendations if they want to modify an Inspection Plan.

An Inspection Plan should be modified in the following scenarios:

- A policy that is used in a Compliance Strategy Template is modified.
- The Compliance Strategy records that are associated with a policy that is mapped to a Compliance Strategy Template are modified.

Modifying Compliance Recommendations on an Approved Inspection Plan

An Inspection Plan that is in the Approved state is ready for implementation, but you can choose to modify the Inspection Plan further by modifying Compliance Recommendations. When you modify the Inspection Plan:

- The plan is moved from the Approved state to the Modified state.
- Linked tasks are removed from the Inspection Plan, but they remain linked to the asset.
- An Inspection Plan Revision record is created and linked to the existing Inspection Plan.
- For each existing Compliance Recommendation record, a Compliance Recommendation Revision record is created and linked to the Inspection Plan Revision.
- Any existing Compliance Recommendations are deleted. New Compliance Recommendations that are based on the mapped policy in the Compliance Strategy Template populate the Inspection Plan.

Modifying Compliance Recommendations on an Inspection Plan That is in the Proposed or Modified State

You can also modify Compliance Recommendations on Inspection Plans that are in the Proposed or Modified state.

- When an Inspection Plan that is in the Proposed state is modified, any existing Compliance Recommendations are updated, while any Compliance Recommendations that are in the Superseded or Not Required state are returned to the Proposed state. In addition, the value in the Comments field of the Compliance Recommendation datasheet is deleted. Depending on the mapped policy in the Compliance Strategy Template, new Compliance Recommendations may be created.
- When an Inspection Plan that is in the Modified state is modified, any existing Compliance Recommendations are deleted, and new Compliance Recommendations are generated based on the mapped policy in the Compliance Strategy Template.

Access an Inspection Plan

You can access an Inspection Plan for an asset that is linked to a Compliance Strategy Template.

Before You Begin

You must have assets for which you have created an Inspection Plan.

Procedure

1. Access Compliance Management, and then select the **Assets with Inspection Plans** tab.

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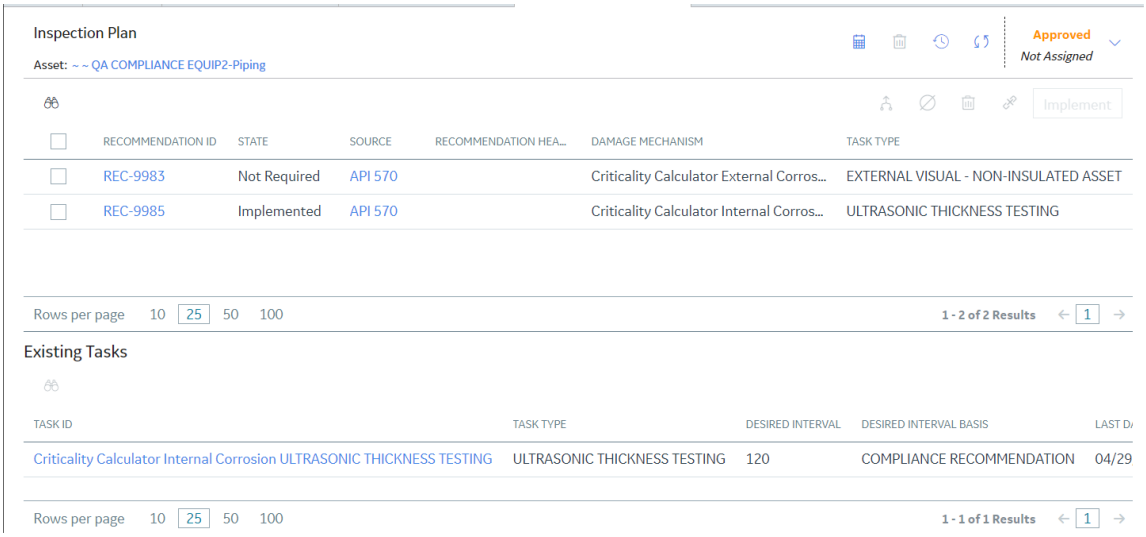
2. Select an asset that has an Inspection Plan that you want to access.
   The **Inspection Plan** page for the selected asset appears.



Create an Inspection Plan from the Compliance Management Overview Page

You can create an Inspection Plan for assets that are linked to Compliance Strategy Templates.

Before You Begin

The assets must have one or more Compliance Strategy Templates linked to them.

Procedure

1. Access Compliance Management, and then select the **Assets without Inspection Plans** tab.
   The **Assets without Inspection Plans** section appears, displaying a list of available assets based on the current filter.
2. In the Assets section, select the check boxes against the rows containing the asset to create an Inspection Plan.
   The selected assets are highlighted.
3. Select **Create Inspection Plans**.

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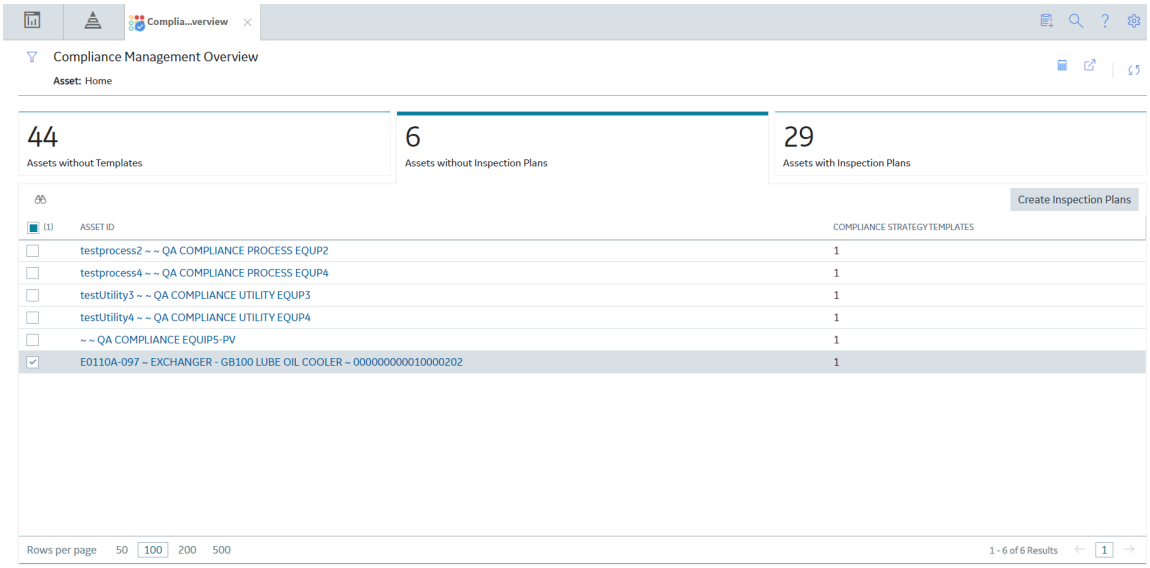

The job status appears in the page heading, displaying the progress of the Inspection Plan creation.

Note: When the process is complete, you can select to access the **Schedule Logs** page.

Create an Inspection Plan for any Asset Using the Asset Hierarchy

About This Task

You can create an Inspection Plan for assets that are linked to Compliance Strategy Templates.

Note: If the asset is not linked to a Compliance Strategy Template, the **Create Inspection Plans** button does not appear.

Before You Begin

The assets must have one or more Compliance Strategy Templates linked to them.

Note: The following procedure is applicable only if the selected asset does not contain an Inspection Plan.

Procedure

1. Access the **Assets** page.
   The Asset Hierarchy appears in the **Assets** page.
2. In the left pane, in the **Hierarchy** section, enter the Asset ID in the Search box, and then press Enter.
3. Select an asset that does not contain an Inspection Plan.
4. Select the **Integrity** tab.
5. Select the link next to Compliance Management.
   The **Inspection Plan** page appears.
6. Select **Create Inspection Plans**.
   The job status appears in the page heading, displaying the progress of the Inspection Plan creation.

   Note: When the process is complete, you can select to access the **Schedule Logs** page.

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Update Compliance Recommendations for an Inspection Plan

Any user with the MI Inspection Plan Approver or MI Compliance Analyst Security Role can update Compliance Recommendations for Inspection Plans for assets that previously contained Inspection Plans.

Before You Begin

- You must have an asset for which you had created an Inspection Plan.
- You must have one of the following Security Roles:
  - MI Inspection Plan Approver
  - MI Compliance Analyst

Procedure

1. Access Compliance Management, and then select the **Assets with Inspection Plans** tab.

   Note: If you want to update only one Inspection Plan, you can access that Inspection Plan, and then select .
2. Select the check box next to each asset for the Inspection Plan for which you want to update the Compliance Recommendation.
3. Select **Update Compliance Recommendations**.
   The **Confirm Update** window appears, asking you if you want to update the selected Inspection Plans.
4. Select **Yes**.

   Tip: If any Inspection Plans for the selected assets are in the Approved state, the **Reason for Revision** window appears. In the text box, enter a reason for updating the Compliance Recommendations for the Inspection Plans, and then select **Done**.

   The job status appears in the **Compliance Management Overview** page, displaying the progress of the update.

   Note: When the process is complete, you can select to access the **Schedule Logs** page.

Approve an Inspection Plan

Any user with the MI Inspection Plan Approver Security Role can move an Inspection Plan to the Approved state. After the Inspection Plan is approved, recommendations can be implemented as tasks.

About This Task

When an Inspection Plan is in the Approved state, you can create new Inspection Tasks or link existing Inspection Tasks to the related recommendations. The Inspection Tasks are transferred to the Inspection Management module.

Procedure

1. Access the Inspection Plan that you want to approve.
2. In the **Proposed** box, select **Approve**, and then select **Done**.
   A message appears, stating that the Inspection Plan has been approved.

   Note:

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- After you approve an Inspection Plan, you cannot delete, supersede, or designate recommendations as Not Required. You must first move them to the Modified state.
- While the Inspection Plan is being modified, you cannot delete, supersede, or designate recommendations as Not Required.

Delete an Inspection Plan

You can delete Inspection Plans that are obsolete or unnecessary.

Before You Begin

You must have one of the following Security Roles:

- MI Inspection Plan Approver
- MI Compliance Analyst

Procedure

1. Access the Inspection Plan that you want to delete.
2. In the **Inspection Plan** page, select .
   The **Confirm Delete** window appears, asking you to confirm that you want to delete the Inspection Plan.
3. Select **Yes**.
   The Inspection Plan is deleted.

   Note: An Inspection Plan cannot be deleted if it has recommendations.

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Chapter 4

Inspection Plan Management

Topics:

- Overview
- Access Inspection Plan Management
- Approve Inspection Plans in Bulk
- Implement Inspection Plans in Bulk by Creating New Inspection Tasks
- Implement Inspection Plans in Bulk by Linking Existing Inspection Tasks
- Review Active Recommended Actions

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Overview

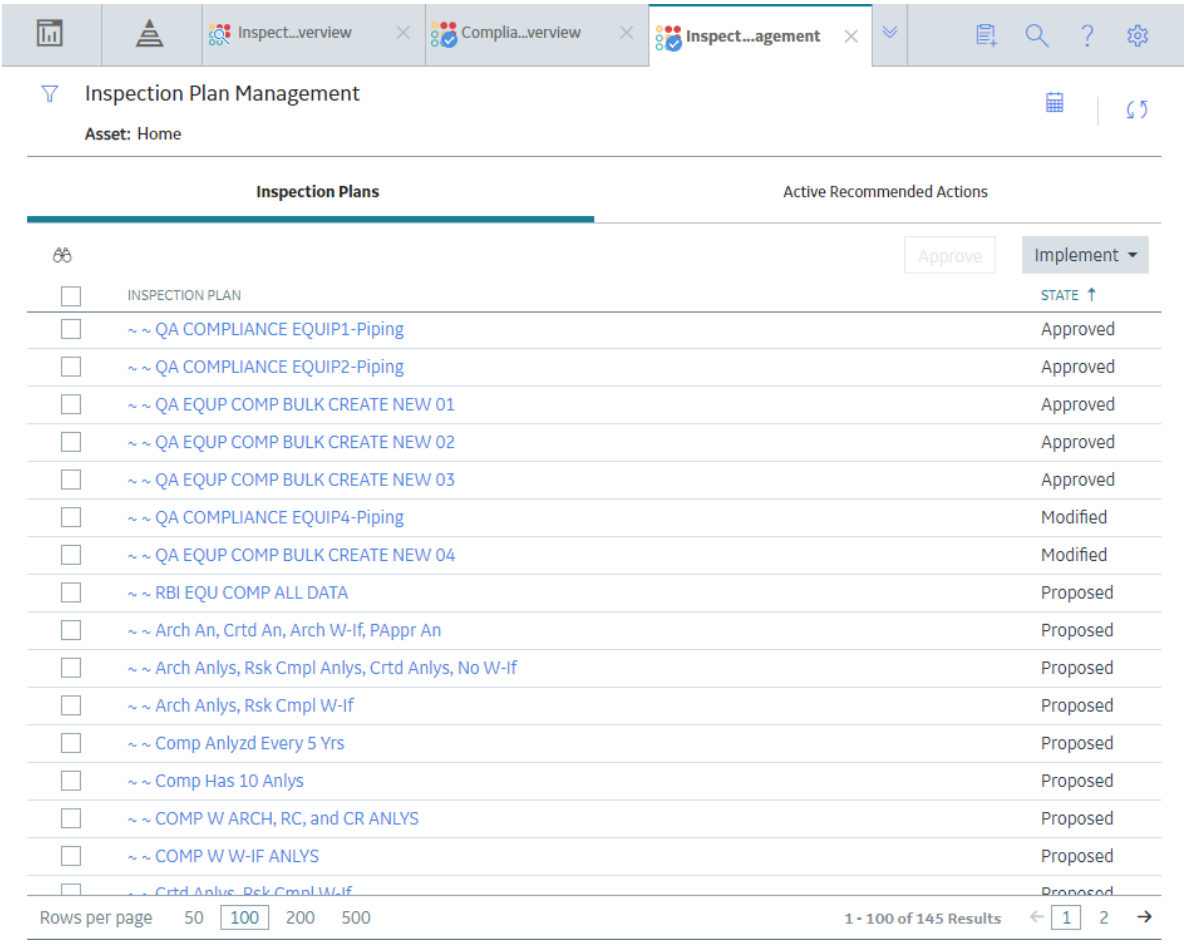
The **Inspection Plan Management** page allows you to review multiple inspection plans and active recommended actions for any level in the Asset Hierarchy. In addition, you can approve or implement multiple Inspection Plans in bulk.

Note: Inspection plans can be created in either Risk Based Inspection or in Compliance Management.

Access Inspection Plan Management

Procedure

In the **Compliance Management Overview** page, select .
The **Inspection Plan Management** page appears, displaying the **Inspection Plans** section.



Next Steps

You can access Inspection Plans and Active Recommended Actions. You can also implement Inspection Plans that are in the Approved state in bulk.

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Approve Inspection Plans in Bulk

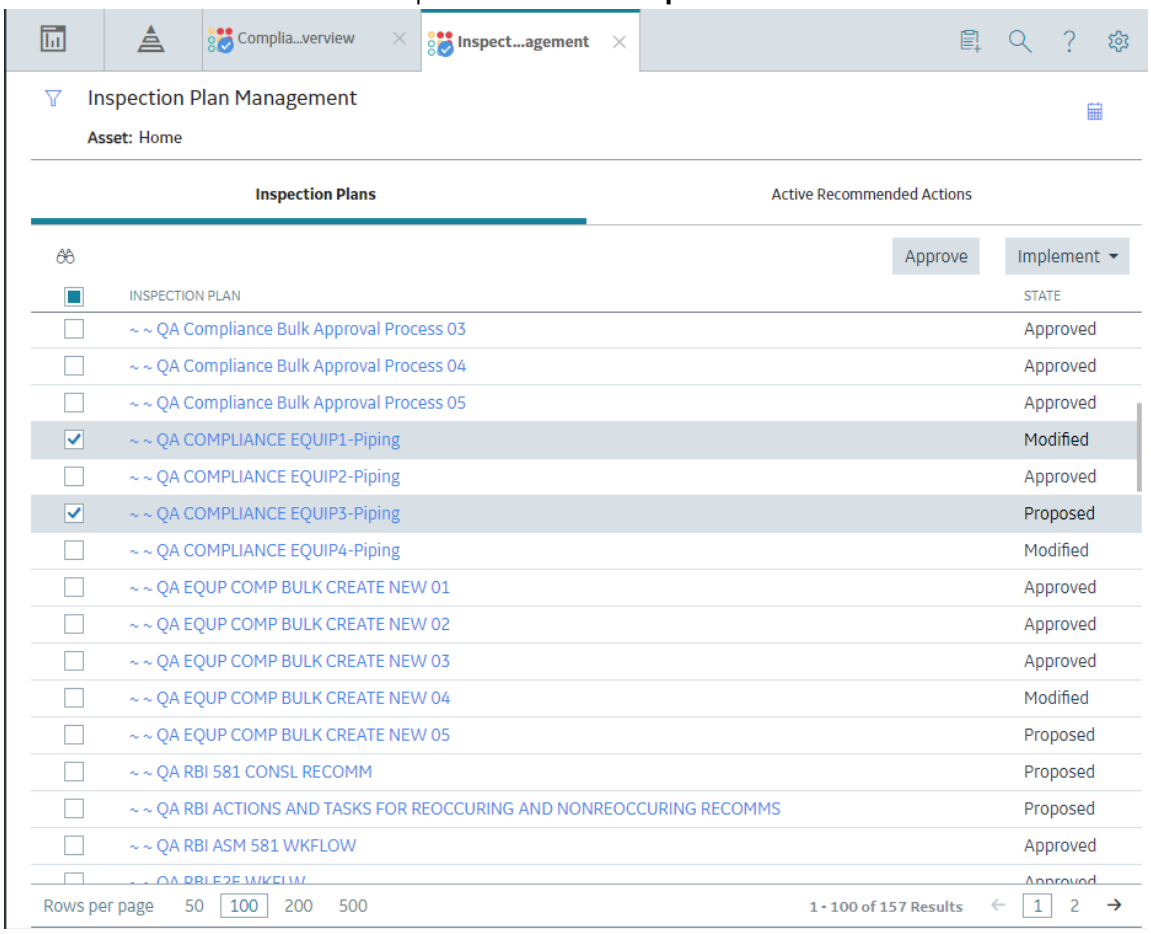
Before You Begin

You must have one or more Inspection Plans that are in the Modified or Proposed state.

Procedure

1. Access the **Inspection Plan Management** page.

   The **Inspection Plan Management** page appears, displaying the **Inspection Plans** section.
2. Select the check box next to each Inspection Plan in the **Inspection Plans** section.



3. Select **Approve**.
4. The **Confirm Approval** window appears, asking you to confirm if you want to approve the selected Inspection Plans.
5. Select **Yes**.

   The job status appears in the page heading, displaying the progress of the Inspection Plan approval for the selected plans. To review the progress, you can select to access the **Schedule Logs** page and search for Type Mechanical Integrity and Description Inspection Plan Approval to check the progress of the approval.

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Note: The Recommended Actions linked to the Approved Inspection Plans can be accessed in the Active Recommended Actions section.

User can choose to implement the Recommended Actions to Tasks in Asset Strategy Management or in Inspection Plan Management page.

Implement Inspection Plans in Bulk by Creating New Inspection Tasks

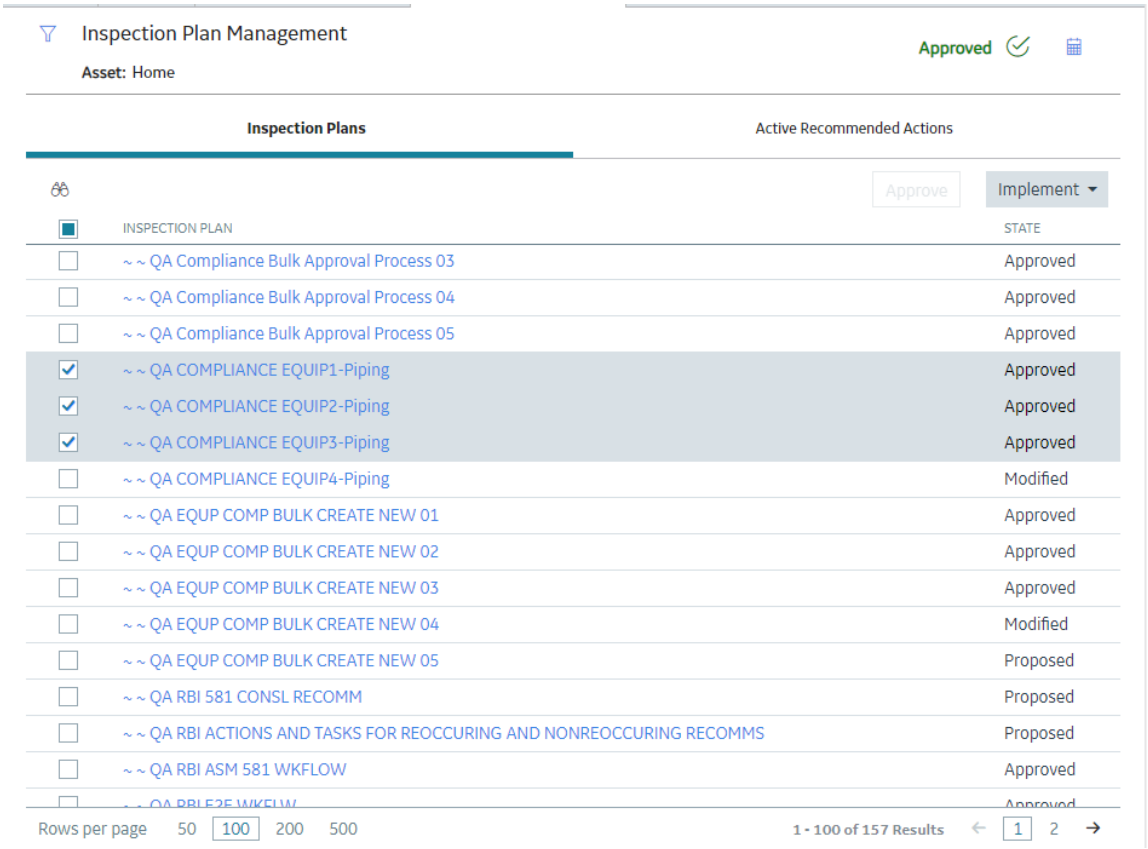
Before You Begin

You must have one or more Inspection Plans that are in the Approved state.

Note: This option is only available when the following selection in the Inspection Configuration section of the IM Admin Preferences available in the Applications settings of the Inspection Management is set to false. Implement Recommended Actions to Tasks in ASM should be unchecked.

Procedure

1. Access the **Inspection Plan Management** page.
   The **Inspection Plan Management** page appears, displaying the **Inspection Plans** section.
2. In the **Inspection Plans** section, next to each Approved Inspection Plan that you want to implement, select the check box.



3. Select **Implement**, and then select **Create New**.

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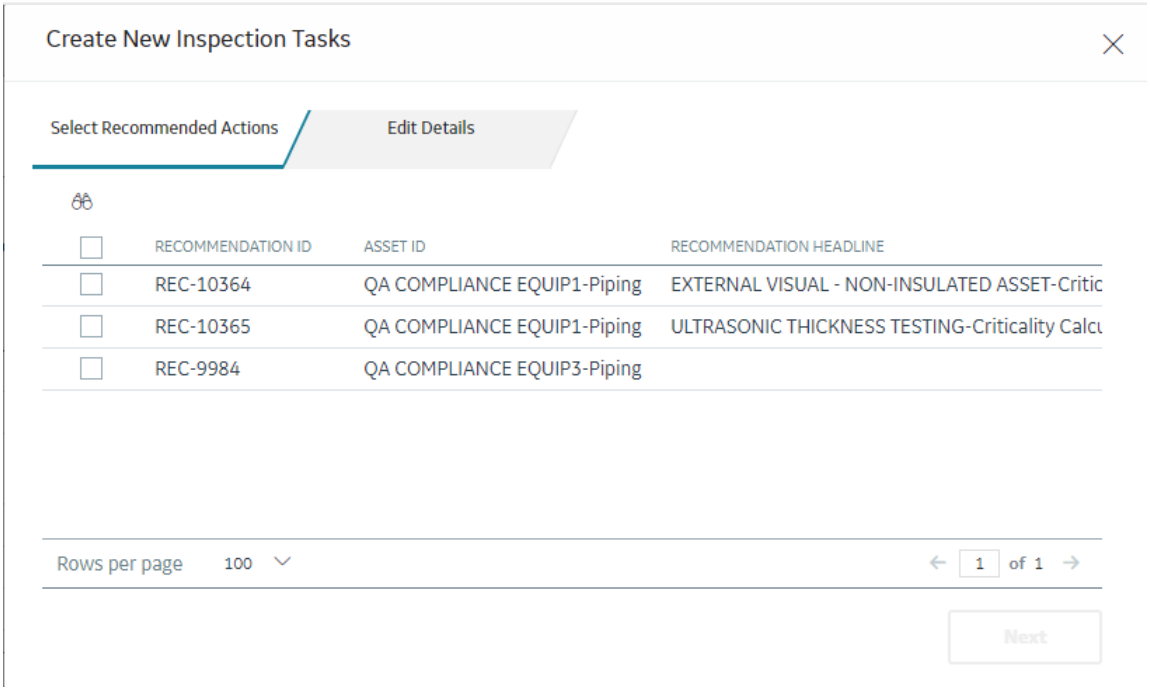
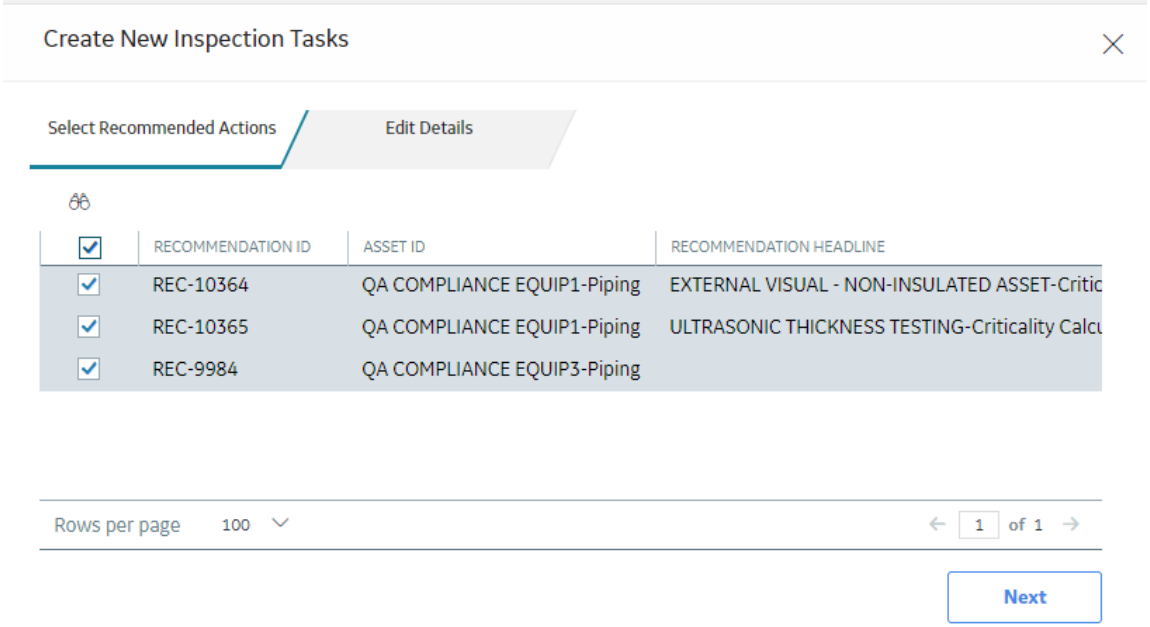
The **Create New** window appears, displaying the **Select Recommended Actions** section. This section displays all the Recommendations linked to the Inspection Plan that have not been implemented to Tasks.



4. Select each Recommended Action for which you want to create new Inspection Tasks.



5. Select **Next**.
   The **Edit Details** section appears.

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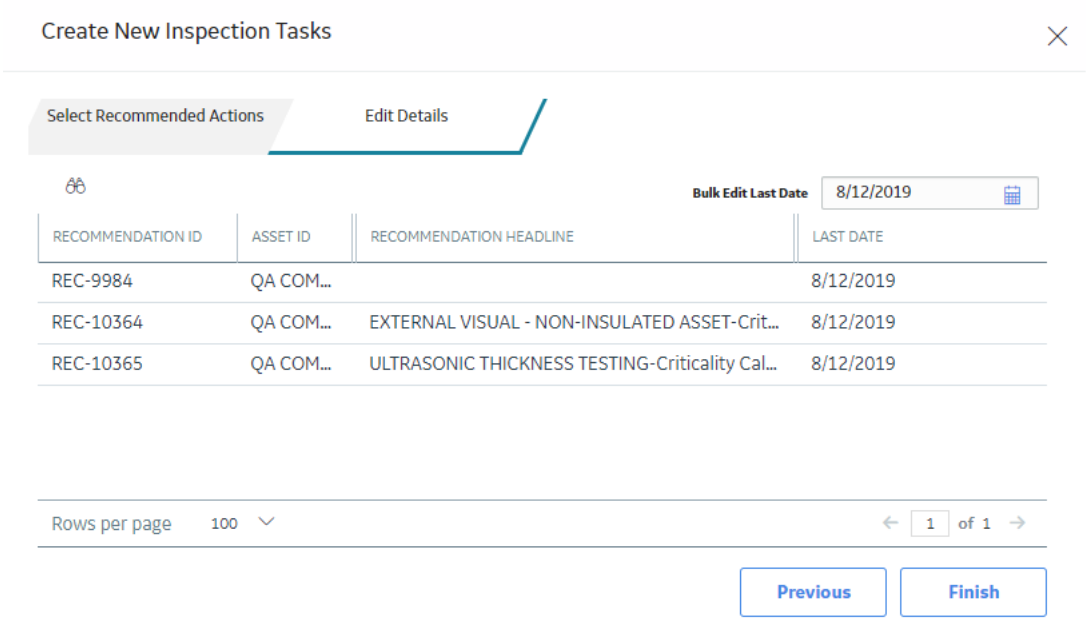

6. You can edit Last Date in bulk using the Bulk Edit Last Date or edit Last Date for individual records in edit details section for recurring recommendations only.

   Note: For all non-recurring recommendations, one cannot edit the Last Date column in the Edit Details sections. Last Date is blank for non-recurring recommendations and is not updated when user edits the date in Bulk Edit Last Date field.
7. Modify the details for the Recommended Actions that you selected.
8. Select **Finish**.
   The job status appears in the page heading, displaying the progress of the Inspection Task creation.

   When the process is complete, you can select to access the **Schedule Logs** page.

Results

The newly created Inspection Tasks are linked to the selected Recommended Actions and linked to the Asset related to the Inspection Plan.

Implement Inspection Plans in Bulk by Linking Existing Inspection Tasks

Before You Begin

You must have one or more Inspection Plans that are in the Approved state.

Note: This option is only available when the Implement Recommended Actions to Tasks in ASM preference in the Inspection Configuration section of the IM Admin Preferences available in the Applications settings of the Inspection Management is unchecked.

Procedure

1. Access the **Inspection Plan Management** page.
   The **Inspection Plan Management** page appears, displaying the **Inspection Plans** section.

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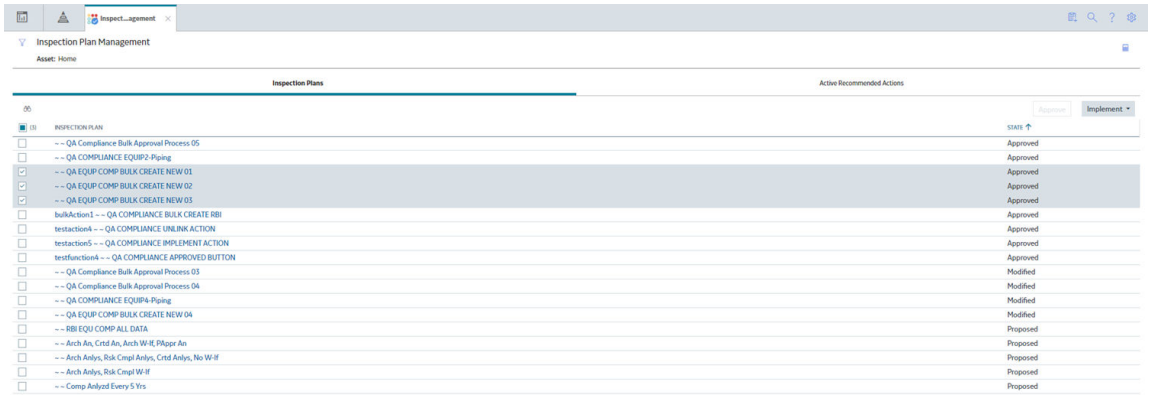
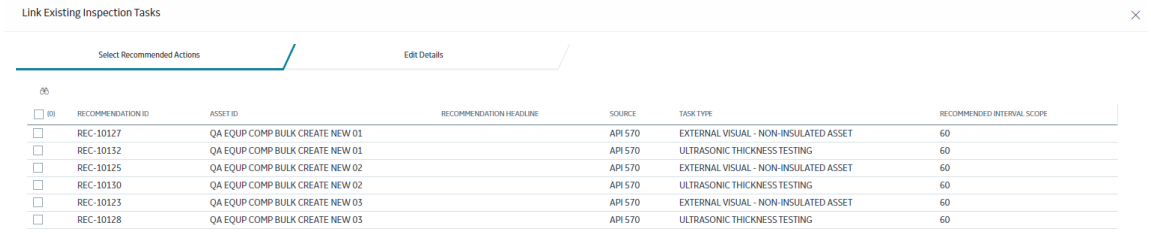
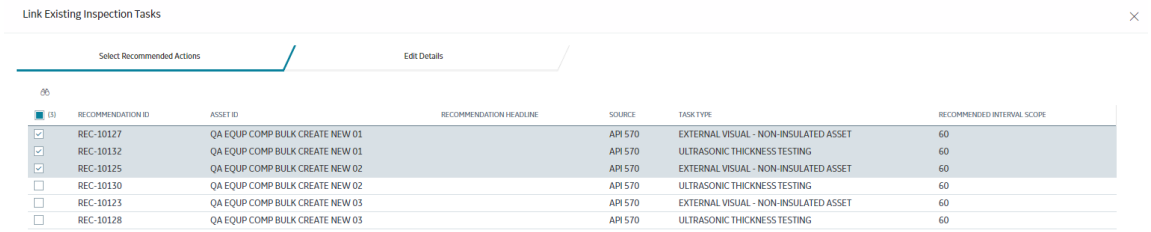
2. In the **Inspection Plans** section, next to each Approved Inspection Plan that you want to implement, select the check box.



3. Select **Implement**, and then select **Link Existing**.
The **Link Existing Inspection Tasks** window appears, displaying the **Select Recommended Actions** section. This section displays all the Recommendations linked to the Inspection Plan that has not been implemented to Tasks.

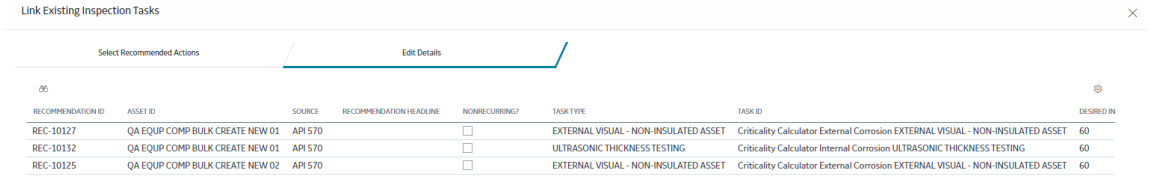


4. Select each Recommended Action that you want to link to Inspection Tasks.



Note: For optimal performance, no more than 100 recommended actions should be selected at one time.

5. Select **Next**.
The **Edit Details** section appears with the Recommended Actions and the existing task which will be linked. The task to link is matched, based on the task type and related asset.



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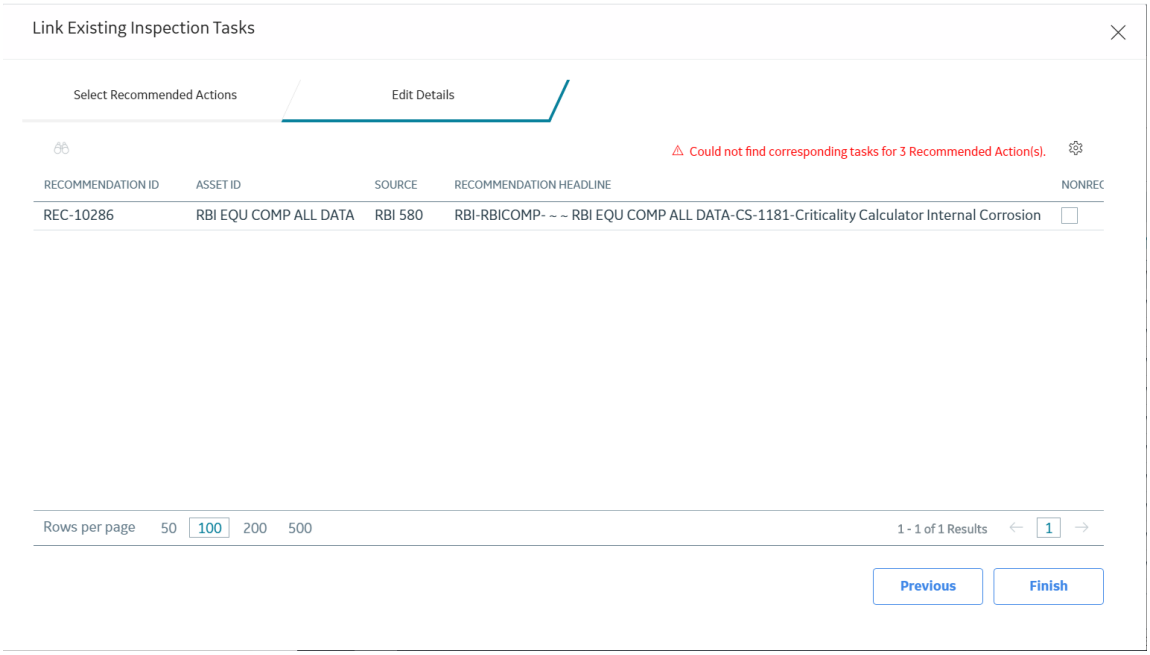
Note: If no task with a matching task type or related asset is found or if the recommended action is recurring and the matching task is nonrecurring, an error will be displayed.



6. Select **Finish**.
   The job status appears in the page heading, displaying the progress of the Inspection Task creation.

   When the process is complete, you can select to access the **Schedule Logs** page.

Results

The Inspection Tasks are linked to the selected Recommended Actions.

Review Active Recommended Actions

The Active Recommended Actions section displays all the recommended actions that have Inspection Plans in an Approved state.

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Inspection Plan Management

Asset: Home

Inspection Plans						Active Recommended Actions
	RECOMMENDATION ID	STATE ↑	INSPECTION PLAN	SOURCE	RECOMMENDATION HEADLINE	DAMAGE MECHANISM
	REC-10123	Approved	~ ~ QA EQUP COMP BULK CREATE NEW 03	API 570		Criticality Calculator External Corrosion
	REC-10125	Approved	~ ~ QA EQUP COMP BULK CREATE NEW 02	API 570		Criticality Calculator External Corrosion
	REC-10127	Approved	~ ~ QA EQUP COMP BULK CREATE NEW 01	API 570		Criticality Calculator External Corrosion
	REC-10128	Approved	~ ~ QA EQUP COMP BULK CREATE NEW 03	API 570		Criticality Calculator Internal Corrosion
	REC-10130	Approved	~ ~ QA EQUP COMP BULK CREATE NEW 02	API 570		Criticality Calculator Internal Corrosion
	REC-10132	Approved	~ ~ QA EQUP COMP BULK CREATE NEW 01	API 570		Criticality Calculator Internal Corrosion
	REC-10225	Approved	~ ~ QA Compliance Bulk Approval Process 05	API 570		Criticality Calculator External Corrosion
	REC-10228	Approved	~ ~ QA Compliance Bulk Approval Process 05	API 570		Criticality Calculator Internal Corrosion
	REC-10303	Approved	testfunction4 ~ ~ QA COMPLIANCE APPROVED BUTTON	API 570		Criticality Calculator External Corrosion
	REC-10304	Approved	testfunction4 ~ ~ QA COMPLIANCE APPROVED BUTTON	API 570		Criticality Calculator Internal Corrosion
	REC-10344	Approved	testaction5 ~ ~ QA COMPLIANCE IMPLEMENT ACTION	RBI 580	RBI-RBICOMP-testaction5 ~ ~ QA COMPLIANCE IMPLEMENT ACTION-EB-2624-Creep	Creep
	REC-10345	Approved	testaction4 ~ ~ QA COMPLIANCE UNLINK ACTION	RBI 580	RBI-RBICOMP-testaction4 ~ ~ QA COMPLIANCE UNLINK ACTION-EB-2622-Creep	Creep
	REC-10363	Approved	bulkAction1 ~ ~ QA COMPLIANCE BULK CREATE RBI	API 570		Criticality Calculator External Corrosion
	REC-10364	Approved	bulkAction1 ~ ~ QA COMPLIANCE BULK CREATE RBI	API 570		Criticality Calculator Internal Corrosion
	REC-10383	Approved	bulkAction1 ~ ~ QA COMPLIANCE BULK CREATE RBI	RBI 581	RBI-bulkAction1-EB ~ bulkAction1 ~ ~ QA COMPLIANCE BULK CREATE RBI-581-Thinning Damage	581-Thinning Damage
	REC-10443	Approved	bulkAction1 ~ ~ QA COMPLIANCE BULK CREATE RBI	RBI 580	RBI-RBICOMP-bulkAction1 ~ ~ QA COMPLIANCE BULK CREATE RBI-HD-2628-Creep	Creep
	REC-10249	Implemented	testaction4 ~ ~ QA COMPLIANCE UNLINK ACTION	API 570		Criticality Calculator External Corrosion
	REC-10250	Implemented	testaction4 ~ ~ QA COMPLIANCE UNLINK ACTION	API 570		Criticality Calculator Internal Corrosion
	REC-10305	Implemented	testaction5 ~ ~ QA COMPLIANCE IMPLEMENT ACTION	API 570		Criticality Calculator External Corrosion
	REC-10306	Implemented	testaction5 ~ ~ QA COMPLIANCE IMPLEMENT ACTION	API 570		Criticality Calculator Internal Corrosion
	REC-9985	Implemented	~ ~ QA COMPLIANCE EQUIP2-Piping	API 570		Criticality Calculator Internal Corrosion
	REC-9983	Not Required	~ ~ QA COMPLIANCE EQUIP2-Piping	API 570		Criticality Calculator External Corrosion

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Chapter 5

Compliance Recommendations

Topics:

- Access a Compliance Recommendation
- Modify a Compliance Recommendation
- Delete a Compliance Recommendation
- Implement a Compliance Recommendation to an Inspection Task
- Unlink an Inspection Task from a Compliance Recommendation

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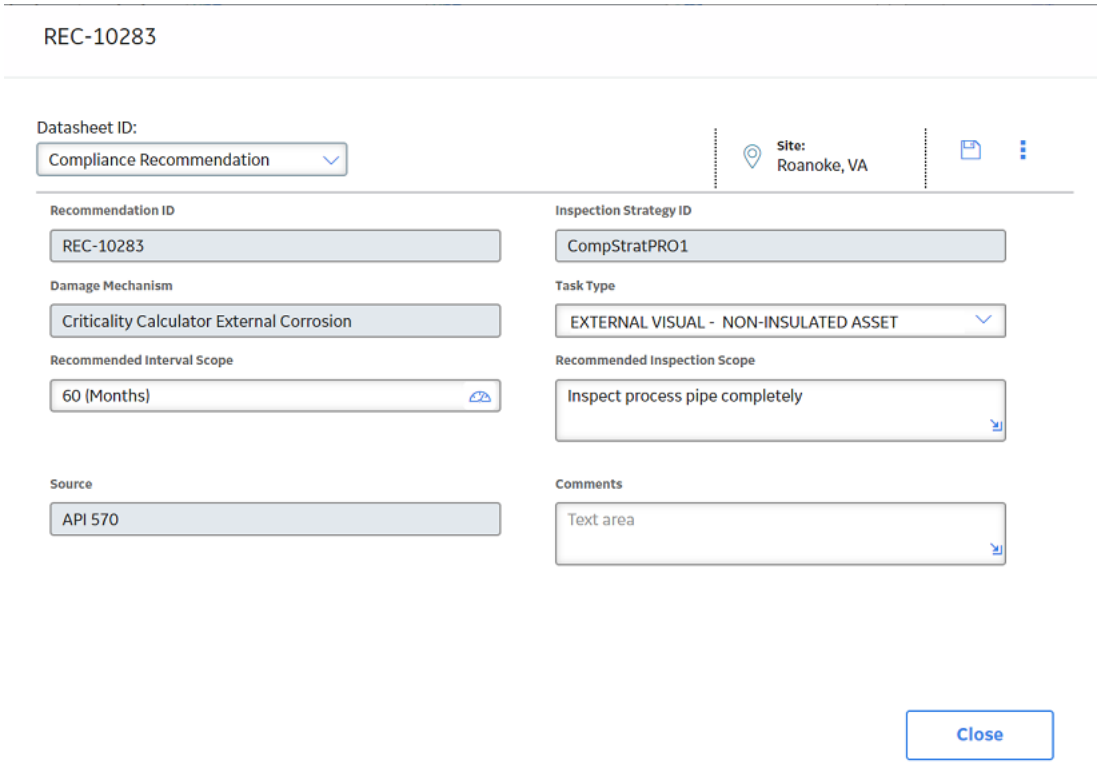
Access a Compliance Recommendation

You can access a Compliance Recommendation that is part of an existing Inspection Plan.

Procedure

1. Access the Inspection Plan that contains the Compliance Recommendations that you want to access.
2. Select the Recommendation ID of the Compliance Recommendation that you want to access.
   The Compliance Recommendation appears.



Modify a Compliance Recommendation

Compliance Recommendations can be marked not required, superseded, or deleted.

Before You Begin

You must have one of the following Security Roles to modify a Compliance Recommendation:

- MI Compliance Analyst
- MI Inspection Plan Approver

Procedure

1. Access the Inspection Plan that contains the Compliance Recommendations that you want to access.
2. Modify the Compliance Recommendation in one of the following ways:

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State	Action
Supersede ( )	Changes the state of the Compliance Recommendation to Superseded. To supersede recommendations: a. Next to two or more Compliance Recommendations, select the check boxes. b. Select . The **Supersede Recommended Actions** window appears. c. Select the Compliance Recommendation that you want to designate as the master recommendation. d. Select **Supersede**. The master recommendation supersedes the other Compliance Recommendations and appears in the grid. **Note:** You can view the superseded recommendations by selecting the number in the **Linked Actions** column.
Not Required ( )	Changes the state of the Compliance Recommendation to Not Required. a. Select the check box next to each Compliance Recommendation that you want to mark Not Required. b. Select . A window appears, asking you to confirm that you want to mark the Compliance Recommendation as Not Required. c. Select **Yes**. The **Reason for Not Required** window appears. d. Enter a reason for marking the Compliance Recommendation as Not Required, and then select **Done**. The Compliance Recommendation is moved to the Not Required state.
Unlink Superseded Recommendations	This unlinks superseded Compliance Recommendations from the master recommendation. The state of the unlinked Compliance Recommendations is modified from Superseded to Proposed. a. Select the number in the **Linked Actions** column of the master recommendation you would like to unlink superseded recommendations from. The **Linked Recommended Actions** window appears, displaying the linked superseded Compliance Recommendations. b. Select the check box next to each Compliance Recommendation that you want to unlink. c. Select **Unlink**. The Compliance Recommendations are unlinked from the master recommendation and appear in the grid. The Compliance Recommendations are then moved to the Proposed state.

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Delete a Compliance Recommendation

Procedure

1. Access the Inspection Plan that contains the Compliance Recommendations that you want to delete.
2. Next to each Compliance Recommendation that you want to delete, select the check box.
3. Select .
   A window appears, asking if you want to delete the selected records.
4. Select **Yes**.
   The Compliance Recommendations are deleted.

Implement a Compliance Recommendation to an Inspection Task

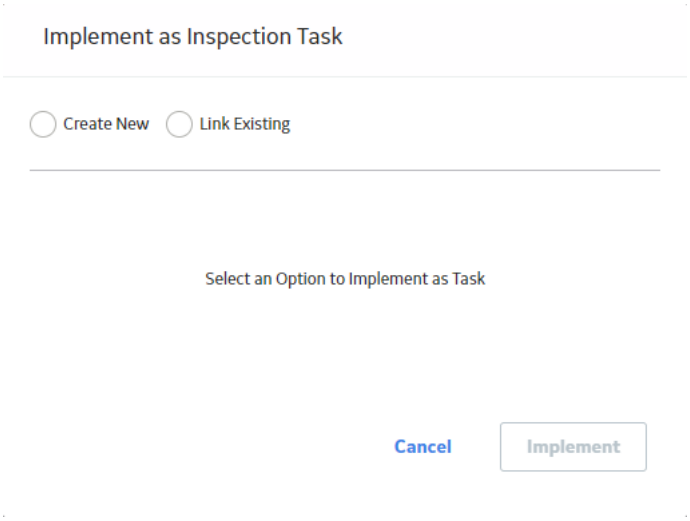
You can create new Inspection Tasks or link existing Inspection Tasks to a Compliance Recommendation that is in the Approved state to add them to the Inspection Plan.

Before You Begin

- Ensure that the **Implement Recommended Actions to Tasks in ASM** setting is set to False in the **Inspection Configuration** section of the **IM Admin Preferences** page.
- You must have an Inspection Plan that is in the Approved state.

Procedure

1. Access the Inspection Plan that contains the Compliance Recommendations that you want to implement.
2. Next to the Compliance Recommendation that you want to implement, select the check box.
3. Select **Implement**.
   The **Implement as Inspection Task** window appears.



4. Select one of the following:

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Action	Description
Create New	Creates a new task that is linked to the Compliance Recommendation. The new task is assigned a Task ID, and the Task ID appears in the **Task ID** column for the respective Compliance Recommendation.
Link Existing	Allows you to select an existing Inspection Task to link to the Compliance Recommendation. The task uses the existing Task ID. **Note:** You cannot link non-reoccurring tasks to Compliance Recommendations.

5. Select **Implement**.
   The Compliance Recommendation is changed to the Implemented state. The Inspection Task is linked to the Compliance Recommendation and appears in the **Existing Tasks** section of the **Inspection Plan** page. Also, some Inspection Task fields are populated by values from the Compliance Recommendation.

Unlink an Inspection Task from a Compliance Recommendation

Procedure

1. Access the Inspection Plan that contains the Compliance Recommendations from which you want to unlink tasks.
2. Select the check box next to the Compliance Recommendation that you want to unlink from its related Inspection Task.
3. Select .
   A message appears, asking if you want to unlink the selected recommendation from the task.
4. Select **Yes**.
   The Inspection Task is unlinked from the Compliance Recommendation.

   Note: The Inspection Task will remain linked to the parent asset. Also, the Desired Interval and Desired Interval Basis fields in the Inspection Task will remain populated based on the previously linked recommendation.

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Chapter 6

Inspection Plan Revision History

Topics:

- About Inspection Plan Revision History
- Access Inspection Plan Revision History

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About Inspection Plan Revision History

An Inspection Plan Revision History record is created when the state of an Inspection Plan is changed from Approved to Modified.

You can modify an Inspection Plan in any of the following scenarios:

- For Compliance Management: When an MI Inspection Plan Approver or an MI Compliance Analyst updates the Compliance Recommendations.
- For Risk Based Inspection (RBI): When an RBI Risk Analysis is moved to the Risk Completed state.

You can Access Inspection Plan Revision History record through the Inspection Plan. Using this record, you can track the progress of an Inspection Plan and view the following details:

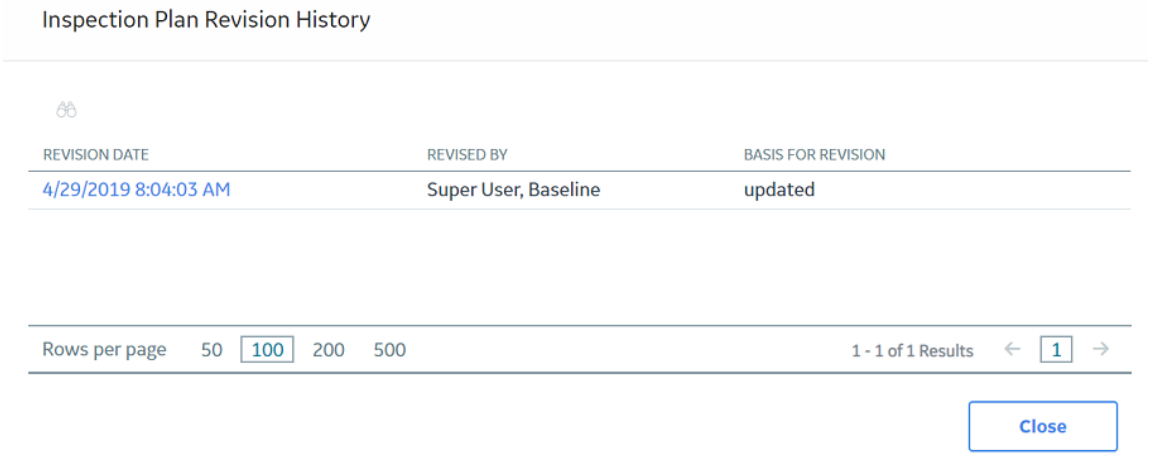
- The name of the user who modified or approved the Inspection Plan.
- The date of revision.
- The reason for revision.

Access Inspection Plan Revision History

You can access the revision history of an Inspection Plan that has been updated.

Procedure

1. Access the Inspection Plan for which you want to access the revision history.
2. In the **Inspection Plan** page, select .
   The **Inspection Plan Revision History** window appears, displaying an Inspection Plan Revision History record for each instance in which the Inspection Plan was updated.



3. In the **Revision Date** column, select the link in the row that contains the Inspection Plan Revision History record that you want to access.
   The Inspection Plan Revision History record appears.

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Inspection Plan Revision History

8/9/2019 3:43:07 AM

RECOMMENDATION ID	SOURCE	STATE	RECOMMENDED INTERVAL SCOPE	NONRECURRING?	TARGET COMPLETION DATE	TASK ID
REC-10285	RBI 581	Approved	60(Months)	☑	8/1/2019	Criticality ...
REC-10286	RBI 580	Approved	60(Months)	☐	8/1/2019	Criticality ...
REC-10287	API 570	Approved	72(Months)	☐	8/1/2019	Criticality ...

Rows per page 5(200 5

1 - 3 of 3 Results 1

Close

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Chapter 7

Suggested Compliance Strategy Templates

Topics:

- About Suggested Templates
- Suggest a Compliance Strategy Template for an Asset
- Apply a Compliance Strategy Template to an Asset

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About Suggested Templates

Users can generate suggested Compliance Strategy Templates for assets in the **Assets without Templates** section of the **Compliance Management Overview** page. This section contains assets that do not have linked Compliance Strategy Templates, but match query results that are associated with existing templates. The Suggested Templates are based on query results used in Compliance Strategy Templates for adding assets.

When a user creates a Compliance Strategy Template, they can add assets using a query. When they select the query that adds the assets, the query is added to the Compliance Strategy Template record and is saved for later use.

In the **Assets without Templates** section of the **Compliance Management Overview** page, a user can select the **Suggest Templates** button to generate suggested Compliance Strategy Templates for each asset. When this job is executed, the queries that are defined in Compliance Strategy Template records are executed for all assets in the **Assets without Templates** section. If the assets find a match with a query related to a Compliance Strategy Template, the Compliance Strategy Template becomes the suggested template for the asset.

If a Compliance Strategy Template does not have a query attached to the record, it is excluded from the Suggest Templates job. Additionally, if an asset does not match a query that is attached to a Compliance Strategy Template, it will not receive a suggested Compliance Strategy Template.

Suggest a Compliance Strategy Template for an Asset

Users can get suggested Compliance Strategy Templates for assets that are in the **Assets without Templates** section of the **Compliance Management Overview** page.

Before You Begin

An MI Compliance Administrator must have selected a query on your Compliance Strategy Templates by adding assets to the template using a query.

If a Compliance Strategy Template does not have a query attached to the record, it is excluded from the Suggest Templates job. Additionally, if an asset does not match a query that is attached to a Compliance Strategy Template, it will not receive a suggested Compliance Strategy Template.

Procedure

1. Access the **Configuration Management Overview** page, and then select the **Assets without Templates** tab.

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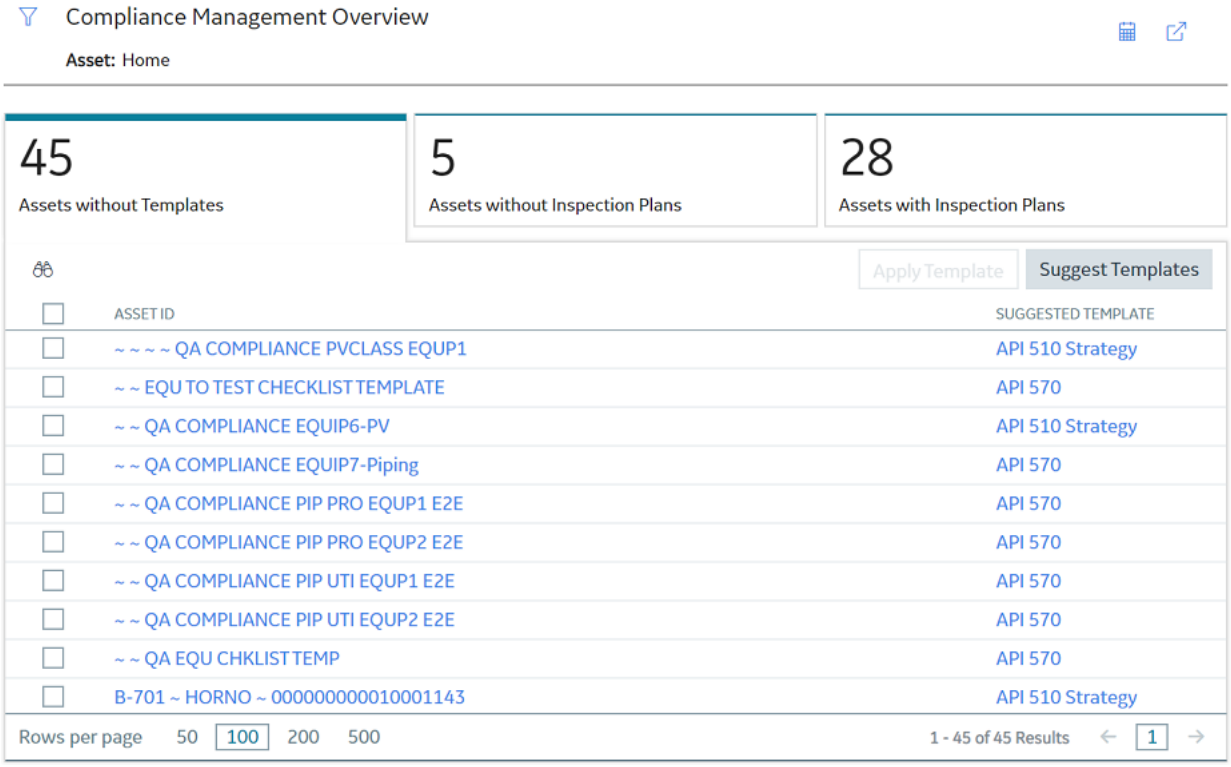
The **Assets without Templates** section appears.



2. Select **Suggest Templates**.
   A window appears, stating that the current Suggested Compliance Template records will be deleted if you proceed.
3. Select **Yes**.
   The Suggest Templates process executes. A scheduled job is created.
4. Optionally, if you want to view the status of the job, select .
   The **Schedule Logs** page appears, displaying a list of all the operations in APM that are in progress, along with the percentages of completion. You can also access a list of operations that have been successful or have failed.
5. Refresh the **Compliance Management Overview** page to update the **Assets without Templates** section.
   Suggested Compliance Templates appear in the **Suggested Template** column for each selected asset.

Apply a Compliance Strategy Template to an Asset

After using Suggest Templates to match assets to Compliance Strategy Templates, users can apply Compliance Strategy Templates to assets that are in the **Assets without Templates** section of the **Compliance Management Overview** page.

Before You Begin

You must have assets with Suggested Compliance Templates.

Procedure

1. Access the **Configuration Management Overview** page, and then select the **Assets without Templates** tab.

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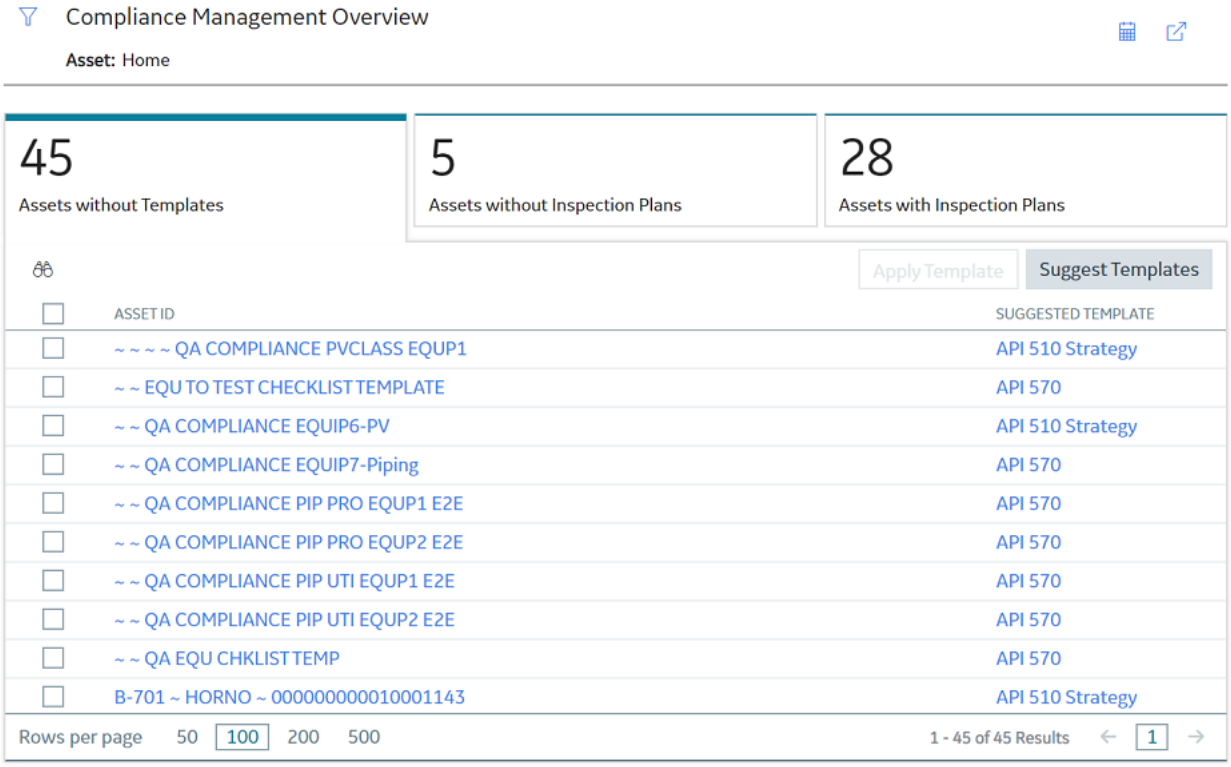
The **Assets without Templates** section appears.



2. Next to the assets for which you want to apply Compliance Strategy Templates, select the check box.

   Note:

   - The **Apply Template** button is disabled until you select assets.
   - The assets that you select must have a Compliance Strategy Template listed in the **Suggested Template** column.

3. Select **Apply Template**.
   A window appears, asking you to confirm that you want to apply the suggested template to the selected asset.
4. Select **Yes**.
   The assets that have templates applied appear in the **Assets without Inspection Plans** section of the **Compliance Management Overview** page.

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Chapter 8

Admin

Topics:

- About Compliance Strategy Templates
- Access the Administrative Features of Compliance Management
- Access a Compliance Strategy Template
- Create a Compliance Strategy Template
- Delete a Compliance Strategy Template
- Add Assets to a Compliance Strategy Template
- Delete Assets from a Compliance Strategy Template
- Map a Policy to a Compliance Strategy Template
- Example: Compliance Strategy Template and Inspection Plan

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About Compliance Strategy Templates

Compliance Strategy Templates help you manage your assets and generate recommendations based on a selected policy.

Creating a Compliance Strategy Template lays the groundwork for creating a cohesive and compliant Inspection Plan for linked assets. When an MI Compliance Administrator creates a Compliance Strategy template, they must choose a policy to link to the template that will enable recommendation generation when the Inspection Plan creation is initiated. After the policy is selected, the MI Compliance Administrator then links assets to the Compliance Strategy Template. At this point, Inspection Plans can be created by the MI Compliance Analyst or the MI Compliance Approver.

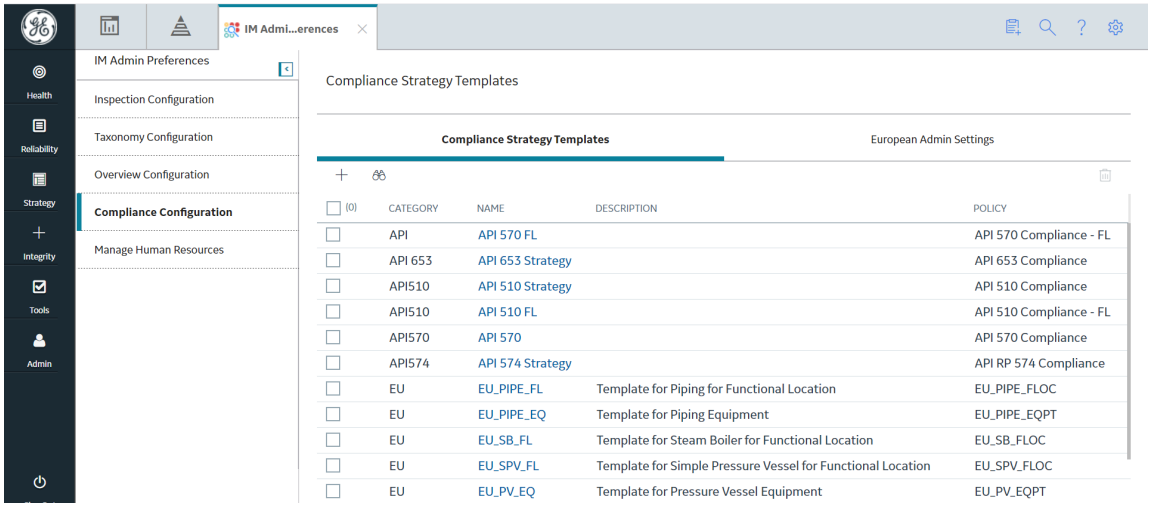
When the Inspection Plan creation is initiated, the policy selected in the Compliance Strategy Template is executed against the assets that are linked to the template. Then, Inspection Plans are created, and recommendations are generated according to the guidelines specified in the policy. When an asset is linked to multiple Compliance Strategy Templates, the policy for each template executes, and the recommendations are linked to the Inspection Plan of that asset.

Access the Administrative Features of Compliance Management

By accessing the administrative features of Compliance Management, you can create Compliance Strategy Templates, which enables you to create Inspection Plans.

Procedure

1. In the module navigation menu, select **Admin** > **Application Settings** > **Inspection Management**.
2. Select **Compliance Configuration**.
   The **Compliance Configuration** workspace appears.



Access a Compliance Strategy Template

Procedure

1. Access the administrative features of Compliance Management.

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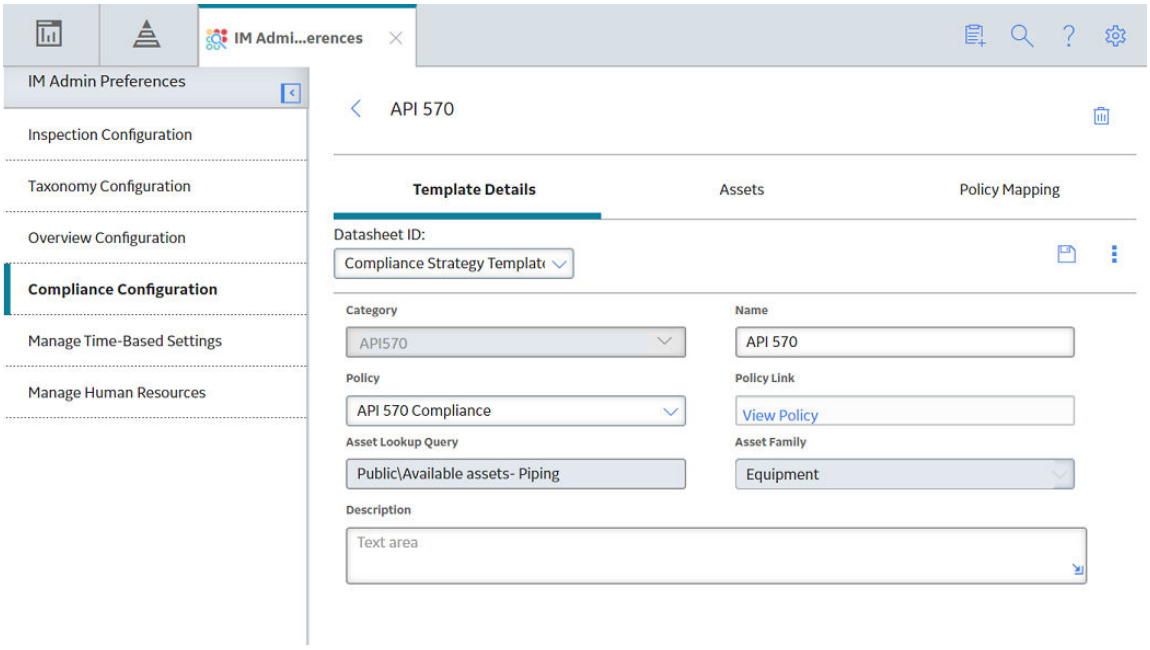
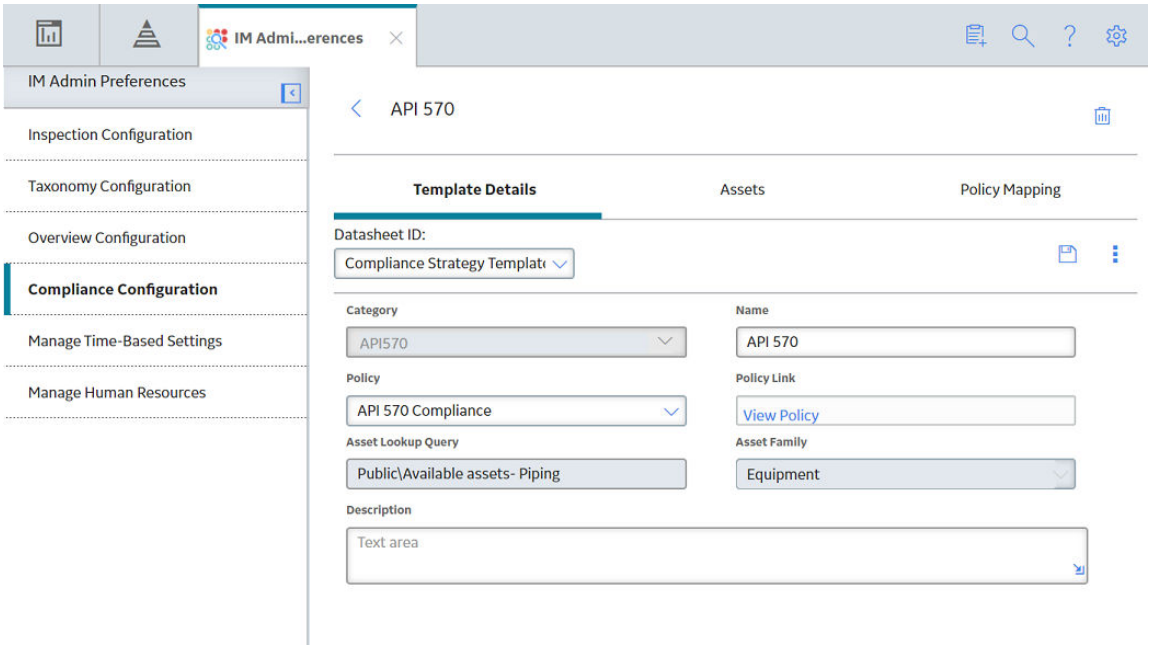
2. In the **Compliance Templates** section, select the name of the Compliance Strategy Template that you want to access.
   The Compliance Strategy Template datasheet appears, displaying the **Template Details** section.



Create a Compliance Strategy Template

Procedure

1. Access the **Compliance Strategies** workspace.
2. In the **Compliance Templates** section, select +.
   The Compliance Strategy Template datasheet appears, displaying the **Template Details** section.



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3. In the datasheet, enter values in the available fields.

   Note:

   - In the **Compliance Category Name** drop-down, you can add a new Compliance Category by entering a name in the Add Caption field.
   - When you select a policy to link to the Compliance Strategy Template, you must select a policy that has the same family as the Compliance Strategy Template.
   - You can select the Policy Link field to navigate to the Policy Designer to view or modify the selected policy.
4. Select **Save**.
   The Compliance Strategy Template is saved.

Delete a Compliance Strategy Template

Procedure

1. Access the administrative features of Compliance Management.
2. In the **Compliance Templates** section, next to the name of the Compliance Strategy Template that you want to delete, select the check box.
3. Select .
   A window appears, asking you to confirm that you want to delete the Compliance Strategy Template.
4. Select **Yes**.
   The Compliance Strategy Template is deleted.

Add Assets to a Compliance Strategy Template

Procedure

1. Access the Compliance Strategy Template to which you want to add assets.
2. Select the **Assets** tab.

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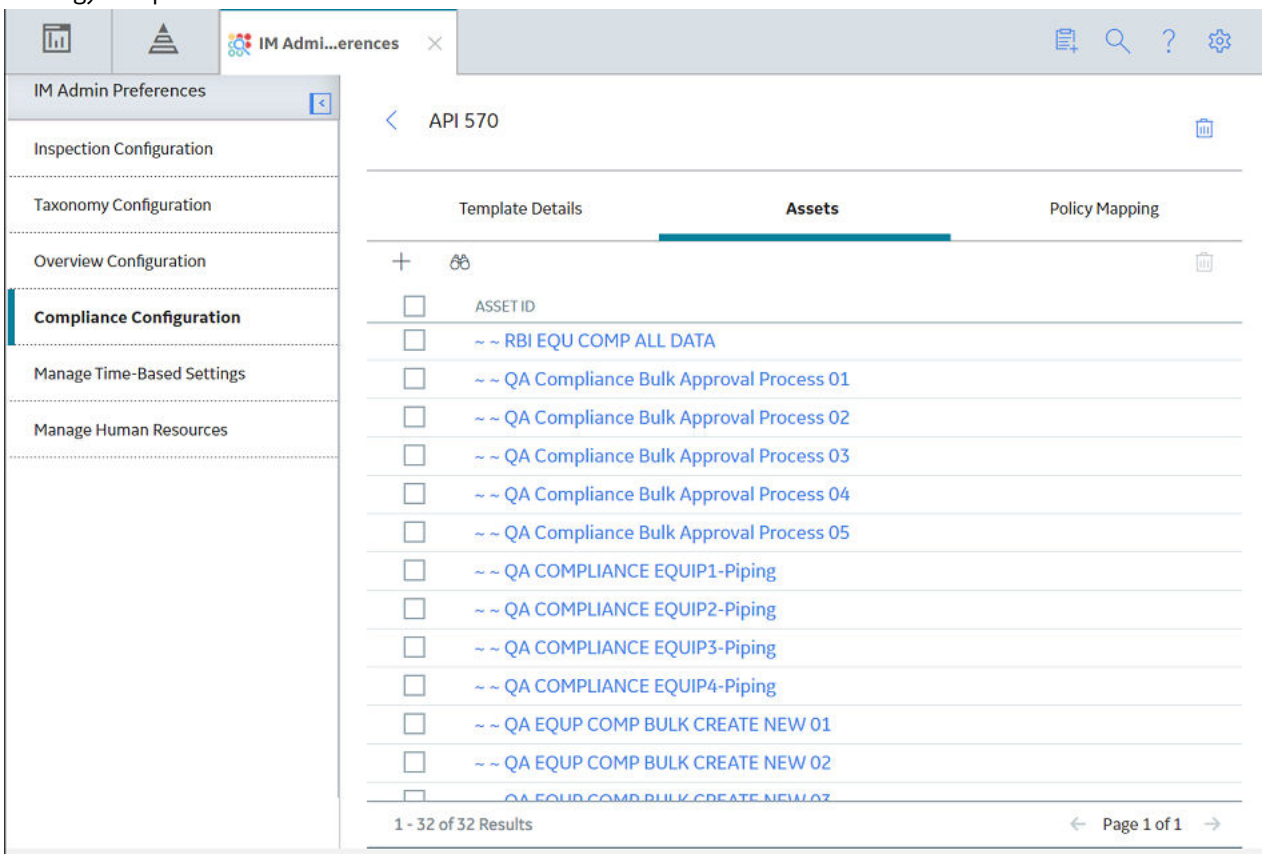
The **Assets** section appears, displaying a list of assets associated with the selected Compliance Strategy Template.



3. In the **Assets** section, select +.
4. In the drop-down list box, select an option:

Add an Asset	Actions
Via Finder	a. In the **Hierarchy Finder** window, navigate to the asset that you want to add. b. Next to each asset that you want to add to the Compliance Strategy Template, select the +. The selected assets appear in the **Hierarchy Finder** window. c. Select **OK**.
Via Query	a. In the **Add Assets to <Asset ID>** window, next to each query that you want to use to search for assets to add to the Compliance Strategy Template, select the check box, and then select **Next**. **Note:** • After you select the first query and assets, the query that you selected is stored in the Asset Lookup Query field of the Compliance Strategy Template record. Subsequent uses of the Add Asset via Query tool will use the previously selected query by default. Additionally, the results of this query are used in the **Assets without Templates** section of the **Compliance Management Overview** page. To use a different query in the Add Asset via Query tool, select **Previous**, and then select a query from the catalog. • When you use a query to select assets, one of the output fields of the query must be the entity key for an asset. The field in the query must be named ASSET_ENTY_KEY. • If you have already added assets to the Compliance Strategy Template, you can filter the query results using a WHERE parameter; the entity key of the template must be TEMP_ENTY_KEY. The **Select Assets** section appears, displaying the results of the query that you selected.

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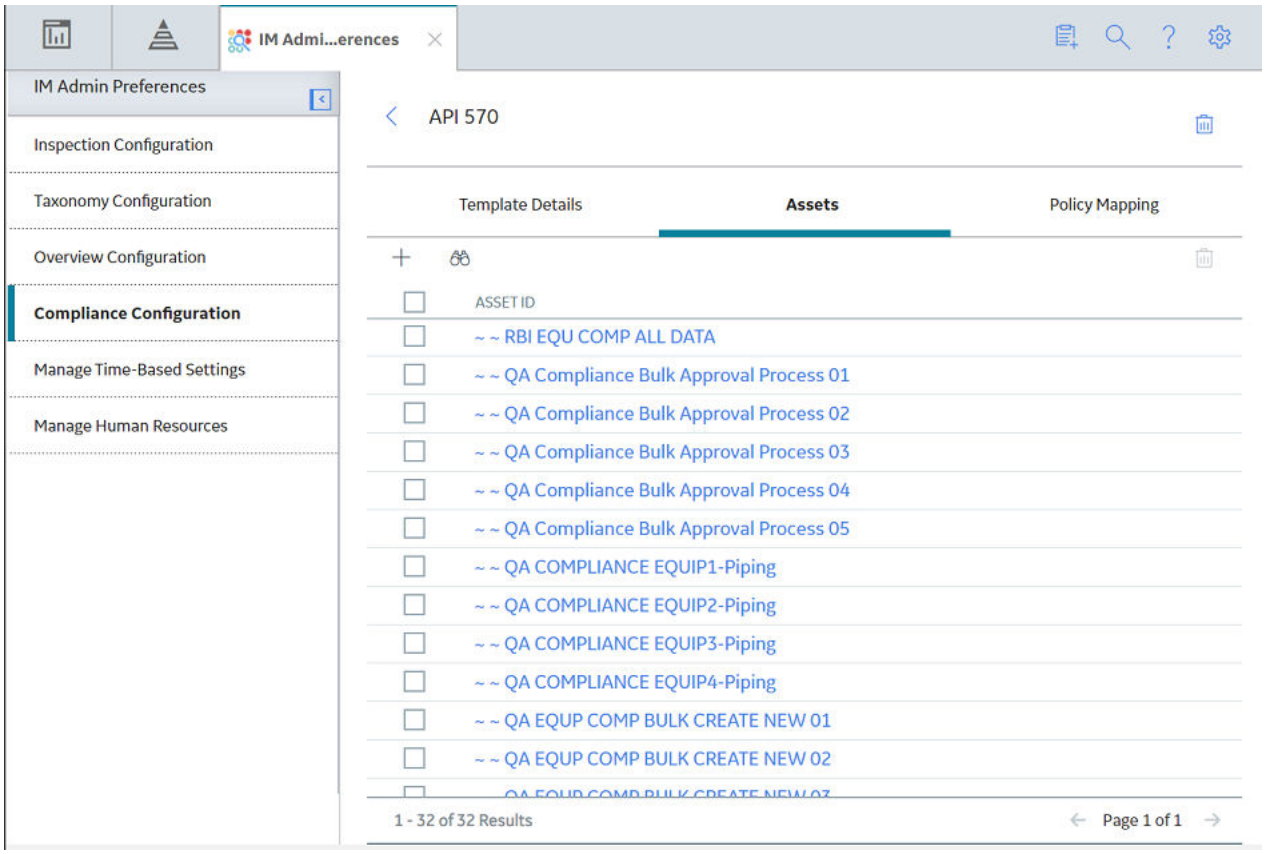
Add an Asset	Actions
	b. In the **Select Assets** section, next to each asset that you want to add, select the check box. c. Select **Finish**.

The selected assets appear in the **Assets** section.

Important:

- When you select assets to add, you must select assets that are in the same family as the defined asset family for the template. Additionally, you cannot add the same asset more than once.
- When you are adding assets to the Compliance Strategy Template, the assets listed in the Hierarchy Finder and the queries listed are site filtered.



Tip: If one or more assets cannot be added to the Compliance Strategy Template, an error message will appear. You can select the error to view a list of assets that were not successfully added to the template.

Delete Assets from a Compliance Strategy Template

Procedure

1. Access the Compliance Strategy Template from which you want to delete assets.
2. Select the **Assets** tab.

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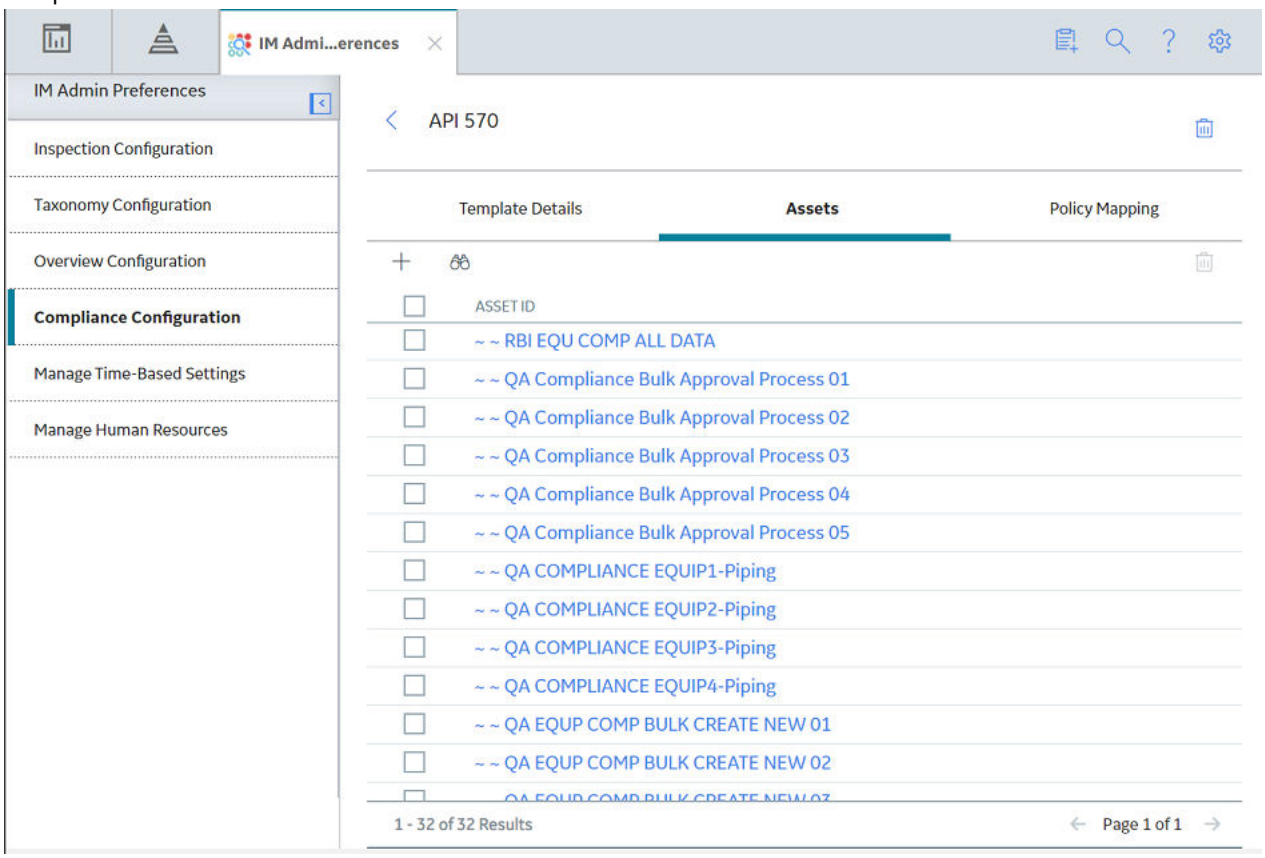
The **Assets** section appears, displaying a list of assets associated with the Compliance Strategy Template.



3. Next to each asset that you want to delete, select the check box.
4. Select .
   A window appears, asking you to confirm that you want to delete the asset.
5. Select **Yes**.
   The asset is deleted from the Compliance Strategy Template.

Map a Policy to a Compliance Strategy Template

Before You Begin

You must have an existing Compliance Strategy Template that has a linked policy.

Procedure

1. Access the Compliance Strategy Template to which you want to map a policy.
2. Select the **Policy Mapping** tab.
   The **Policy Mapping** section appears, displaying a list of families and policy nodes.

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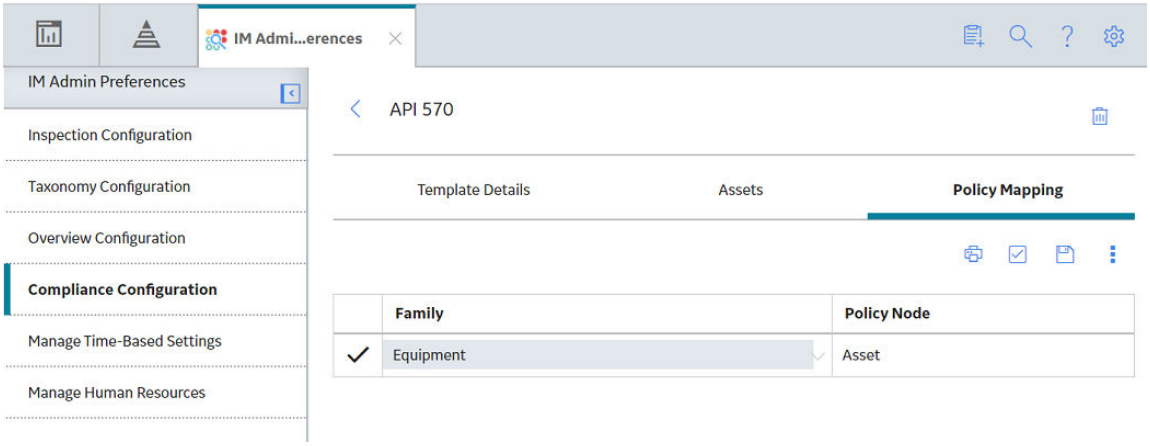

3. Next to the family that you want to modify, in the **Policy Node** box, enter the name of the policy node that you want to map to the family.

   Note: The policy node that you map to the family should be an entity node that is part of the policy that you linked to the Compliance Strategy Template.

4. Select .
   The policy mapping is saved.

Example: Compliance Strategy Template and Inspection Plan

The following example details a Compliance Strategy Template with a working policy that results in a cohesive Inspection Plan.

This topic has been intentionally excluded from the APM product documentation website. This topic is available to you via the product documentation that is provided within the APM system.

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Chapter 9

Deployment

Topics:

- Deployment and Upgrade

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Deployment and Upgrade

Deployment and Upgrade content for various APM modules has been consolidated into a single document. For more information, refer to the module-specific information in the APM Module Deployment and Upgrade document.

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Chapter 10

Reference

Topics:

- General Reference
- Data Models
- Family Field Descriptions
- Family Search Configuration

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General Reference

Compliance Queries

Compliance Folder Items

The Catalog folder `\\Public\Meridium\Modules\Inspection\Compliance\Queries` contains the following queries used in the Compliance workflow.

Query	Behavior and Usage
Assets with Templates without Inspection Plans	Displays assets that have a Compliance Strategy Template linked. This query is used in the **Assets with Templates** section in the **Compliance Management Overview** page. The entity key of the asset must be used in the query and have the alias ASSET_ENTY_KEY.
Assets without Templates	Displays assets that do not have a Compliance Strategy Template linked. This query is used in the **Assets without Templates** section in the **Compliance Management Overview** page. The following columns in the query must be used, and the aliases must contain the following values. **Column** / **Alias** MI_ENTITY.ENTY_KEY / ASSET_ENTY_KEY [MI_SUGG_COMP_TEMP].[MI_SUGG_COMP_TEMP_TMP_KEY_N] / TEMP_KEY
Compliance Template Assets	Displays the Compliance Strategy Templates for a given compliance category. This query is used for populating the **Assets** section in the Compliance Strategy Template in the **Compliance Configuration** section of the **IM Admin Preferences** page. **Important:** • The ASSET_ENTY_KEY must not be modified or deleted. • If you are using assets that are from families other than Equipment or Functional Location, you must add the family to the query using a union.
Compliance Templates by Category	Displays the assets associated with a given Compliance Strategy Template. **Important:** The [MI_COMP_STRAT_TEMP].ENTY_KEY column must not be removed, and the alias, ENTY_KEY, must not be modified. In the WHERE criteria, the ID of the parameter must be category.

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Query	Behavior and Usage
Assets with Inspection Plans	Displays the assets that are associated with an Inspection Plan.
Compliance Management Overview Filter Parameters	This query is used in the **Compliance Management Overview** page.
Compliance Templates	This query is used in the **Compliance Templates** section in the **Compliance Management Overview** page.
Assets with Compliance Recommendations	Displays the Compliance Recommendations count for an Asset.

Inspection Plan Queries

The Catalog folder `\\Public\Meridium\Modules\Inspection\Compliance\Queries` contains the following queries used in the Inspection Plan workflow.

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<table>
<tr><th>Query</th><th>Behavior and Usage</th></tr>
<tr><td>Compliance Recommendations by Plan</td><td>Displays Recommendations based on the Inspection Plan.

The following columns in the query must be used, and the aliases must contain the following values.

<table>
<tr><th>Column</th><th>Alias</th></tr>
<tr><td>[MI_COMP_RECOMM].ENTY_ID AND [MI_RBIRECOM].ENTY_ID</td><td>REC_ENTY_ID</td></tr>
<tr><td>[MI_COMP_RECOMM].ENTY_KEY AND [MI_RBIRECOM].ENTY_KEY</td><td>REC_ENTY_KEY</td></tr>
<tr><td>[MI_TASKINSP].[MI_TASK_ID]</td><td>Task ID</td></tr>
<tr><td>a."SUCC_ENTY_KEY"</td><td>Linked Actions</td></tr>
<tr><td>[MI_TASKINSP].ENTY_KEY</td><td>TASK KEY</td></tr>
<tr><td>{MIR_RBICRAN}.PRED_ENTY_KEY

Note: For Compliance Recommendations, the column must be set to NULL. For RBI Consolidated Recommendations, the column must be set to 0.</td><td>Comp Key</td></tr>
<tr><td>PRED_ENTY_KEY

Note: For Compliance Recommendations, the column must be set to NULL. For RBI Consolidated Recommendations, the column must be set to 0.</td><td>Analysis Key</td></tr>
<tr><td>MI_SM_STATES.SMST_ID</td><td>STATE_ID</td></tr>
<tr><td>[MI_COMP_RECOMM].FMLY_KEY AND [MI_RBIRECOM].FMLY_KEY</td><td>FMLY_KEY</td></tr>
<tr><td>[MI_RBIRECOM].[MI_RBIRECOM_NONRE_FLG]</td><td>NonRecurring?</td></tr>
</table>

Important: <code>\\Public\Meridium\Modules\Inspection\Compliance\Queries\Compliance Superseded Recommendation Counts</code> is a subquery and must not be removed from the parent query. In this subquery, the SUCC_ENTY_KEY column is required, and the alias must not be modified.</td></tr>
</table>

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<table>
<tr><th>Query</th><th>Behavior and Usage</th></tr>
<tr><td>Compliance Recommendations to Supersede</td><td>Displays Recommendations for a given entity keys. This query is used to select the master Recommended Action while superseding Compliance Recommendations in the Recommendation section of the Inspection Plan page.

Important: The [MI_RBIRECOM].ENTY_KEY column must not be removed, and the alias REC_ENTY_KEY must not be modified.</td></tr>
<tr><td>Compliance Superseded Recommendations</td><td>Displays a list of Consolidated and Superseded Recommendations. This query is used to access the linked actions in the Inspection Plan page.

Note: The [MI_RBIRECOM].ENTY_KEY column must not be removed, and the alias REC_ENTY_KEY must not be modified.</td></tr>
<tr><td>Inspection Tasks for Asset</td><td>Displays the Inspection Tasks for an asset. This query is used to access the Existing Tasks in the Inspection Plan page.

Important: In the WHERE criteria, the ID of the parameter must be ASSET_ENTY_KEY.</td></tr>
<tr><td>Compliance Superseded Recommendation Counts</td><td>Returns the count of Consolidated and Superseded Recommendations. This query is used in the Recommendation section of the Inspection Plan page.</td></tr>
<tr><td>Inspection Tasks Available to Implement</td><td>Displays the Inspection Tasks available to implement for a Compliance Recommendation. This query is used to access the Inspection tasks after selecting the Implement button in the Inspection Plan page.</td></tr>
<tr><td>Recommended Actions by Selected Plans</td><td>Displays unimplemented actions from a given Inspection Plan. This query is used in the Inspection Plan page. The following columns in the query must be used, and the aliases must not be changed.

<table>
<tr><th>Column</th><th>Alias</th></tr>
<tr><td>[MI_COMP_RECOMM].ENTY_ID AND [MI_RBIRECOM].ENTY_ID</td><td>REC_ENTY_ID</td></tr>
<tr><td>{MIR_ASST_HAS_INSP_PLAN}.PRED_ENTY_KEY</td><td>ASSET_KEY</td></tr>
</table>
Important: In the WHERE clause, the ID of the parameter must be ENTY_KEYS.</td></tr>
</table>

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<table>
<tr><th>Query</th><th>Behavior and Usage</th></tr>
<tr><td>Link Existing Task to Recommended Action</td><td>Returns an Inspection Task to link to a given Recommendation based on Asset and Task Type. This query is used in the Inspection Plan page. The following columns in the query must be used, and the aliases must not be changed.

<table><tr><th>Column</th><th>Alias</th></tr><tr><td>[MI_TASKINSP].ENTY_KEY</td><td>ENTY_KEY</td></tr></table>
Important: In the WHERE clause, the following parameter IDs must be provided and not modified:
• TASK_TYPE
• ASSET_KEY</td></tr>
<tr><td>All Inspection Plans for Unit</td><td>Returns all Inspection Plans for the selected location in the hierarchy. This query is used to access all the Inspection plans in the Inspection Plan Management page.</td></tr>
<tr><td>Active Recommendations of Plans for Unit</td><td>Returns all active recommendations for Inspection Plans for the selected location in the hierarchy. This query is used to view active recommendations in the Inspection Plan Management page.</td></tr>
<tr><td>Inspection Plan Revisions</td><td>Displays the Inspection Plan Revisions for a given Inspection Plan. This query is used to retrieve the revisions for an Inspection Plan.

Important:
• The column [MI_INSP_PLAN_REV].[MI_INSP_PLAN_REV_REVI_DATE_D] must not be removed and its alias must not be changed.
• In the WHERE clause, the ID of the parameter must be PLAN_ENTY_KEY.</td></tr>
<tr><td>Compliance Recommendation Revisions for Inspection Plan</td><td>Displays the Recommendation Revision records for a given Inspection Plan Revision. This query is used in the Inspection Plan page to view the revisions for a Recommendation.

Important:
• The column [MI_COMP_REC_REV].[MI_REC_ID] must not be removed and its alias must not be changed.
• In the WHERE clause, the ID of the parameter must be PLAN_REV_ENTY_KEY.</td></tr>
</table>

Dashboard Queries Folder Items

The Catalog folder `\\Public\Meridium\Modules\MehcanicalIntegrity\Queries \Dashboard Queries` contains the following items that are used in the **Compliance Management Overview** page.

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Query	Behavior and Usage
Compliance Recommendations with Approved Plans	This query is used in the **Active Recommendation Summary** section in the **Compliance Management Overview** page.
Inspection Plan States	This query is used in the **Inspection Plan Summary** section in the **Compliance Management Overview** page.

Compliance Permissions

The following security privileges have been assigned to the `\\Public\Meridium\Modules\Inspection\Compliance\` folder.

Role	Permissions
MI Inspection	• View • Edit • Create • Delete
MI Inspection Viewer	View
MI RBI Administrator	View
MI RBI Analyst	View
MI Thickness Monitoring Administrator	View
MI Thickness Monitoring Inspector	View
MI Thickness Monitoring User	View

Compliance Management URLs

There is one URL route associated with Compliance Management: `cm`. The following table describes the various paths that build on the route and the elements that you can specify for each.

URL	Destination
`cm/overview`	The **Compliance Management Overview** page.

Compliance Strategies URLs

The following URLs in Inspection Management allow you to access Compliance Strategies administrative options.

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Element	Description	Accepted Value(s)	Notes
`im-admin-preferences/compliance-configuration`: Accesses the **Compliance Strategies** workspace.			
`im-admin-preferences/compliance-configuration/<templateKey>`: Accesses a Compliance Strategy Template.			
<templateKey>	Specifies the entity key of the Compliance Strategy Template that you want to view.	The entity key of any Compliance Strategy Template.	None.

Inspection Plan URLs

The following table describes the various paths that are used for the Inspection Plan workflow.

Element	Description	Accepted Value(s)	Notes
`cm/asset/<assetKey>`: Accesses the Inspection Plan for the specified asset.			
`cm/plans`: Accesses the **Inspection Plan Management** page.			
<assetKey>	Specifies the entity key of the asset record which you want to view.	Any asset key that is associated with an asset in the Asset Hierarchy	You should use the asset key of an asset that has an Inspection Plan created. If you select an asset that does not have an Inspection Plan, a warning message appears.

URLs

Example URL	Destination
cm/asset/3290820029	The Inspection Plan for the selected asset.

Compliance Management System Code Tables

The following table lists the System Code Tables that are used by Compliance Management.

Table ID	Table Description	Function
INSM	Inspection Interval Types	Used to populate the Desired Interval Basis list in Inspection Task records.
MI DEGRADATION MECHANISM TYPES	Degradation Mechanism Types	Used to populate the Degradation Mechanism list in Inspection Plan records.

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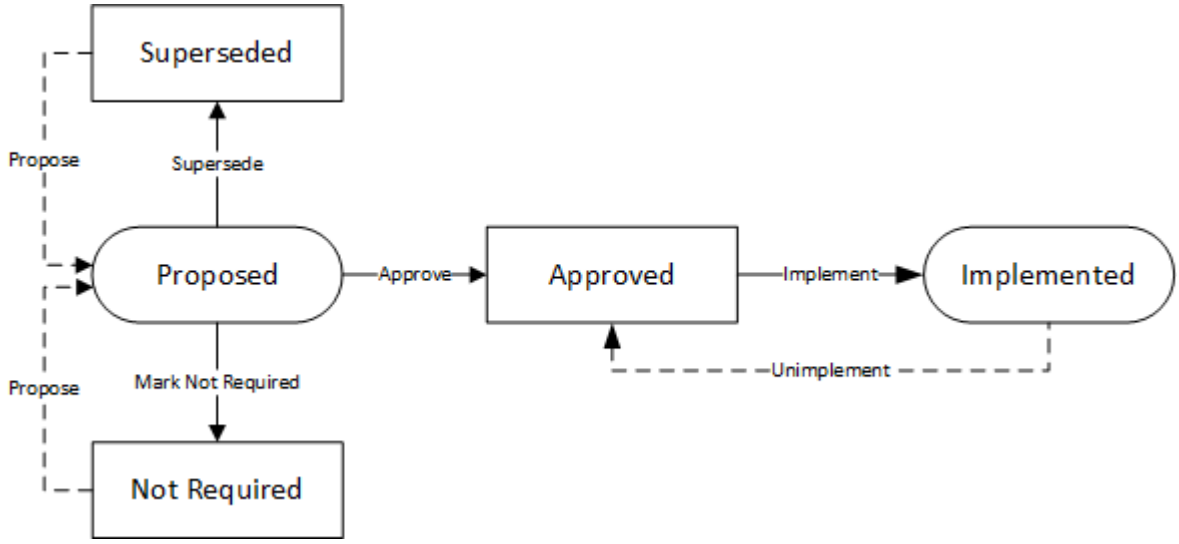
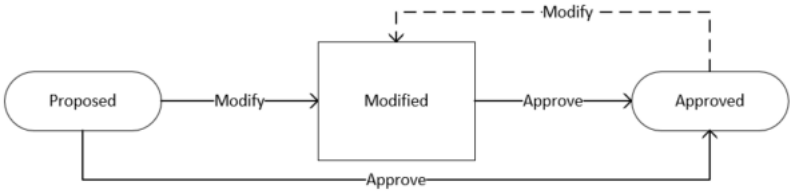
Compliance Management State Management

The following state changes can be applied to Compliance Recommendations and Inspection Plans based on user Security Roles.

The diagram below shows the workflow of the baseline State Management process as it applies to Compliance Recommendations.



The diagram below shows the workflow of the baseline State Management process as it applies to Inspection Plans.



Details

- The Proposed state is the initial state of all Compliance Recommendations.
- The Proposed state is the initial state of all Inspection Plans.
- When you change the state of an Inspection Plan from Approved to Modified, an Inspection Plan Revision History record is created.
- Operations in Compliance Management change the state of Compliance Recommendations or Inspection Plans. Users must have the appropriate security roles to execute these operations.

Reserved States and Operations for Compliance Recommendations

The following tables indicate whether the baseline states and operations are reserved. You cannot remove or modify reserved states or operations.

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State Caption	Reserved State	Security Role
Implemented	Yes	• MI Compliance Analyst • MI Inspection Plan Approver
Not Required	Yes	• MI Compliance Analyst • MI Inspection Plan Approver
Proposed	No	• MI Compliance Analyst • MI Inspection Plan Approver
Superseded	Yes	• MI Compliance Analyst • MI Inspection Plan Approver

Operation	Reserved Operation	Predecessor State	Successor State
Implement	Yes	Proposed	Implemented
Propose	No	Not Required	Proposed
Propose	No	Superseded	Proposed
Mark Not Required	Yes	Proposed	Not Required
Supersede	Yes	Proposed	Superseded
Unimplement	Yes	Implemented	Proposed
Approve	Yes	Proposed	Approved

Reserved States and Operations for Inspection Plans

The following tables indicate whether the baseline states and operations are reserved. You cannot remove or modify reserved states or operations.

State Caption	Reserved State	Security Roles
Approved	No	MI Inspection Plan Approver
Modified	Yes	• MI Compliance Analyst • MI Inspection Plan Approver
Proposed	No	• MI Compliance Analyst • MI Inspection Plan Approver

Operation ID	Reserved Operation	Predecessor	Successor
MI_APPROVE	No	Proposed	Approved
MI_APPV_MODIFIED	No	Modified	Approved
MI_MODIFY	Yes	Approved	Modified
MI_PROMOTE	Yes	Proposed	Accepted

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Compliance Recommendation and Inspection Task Mappings

When you implement a Compliance Recommendation, you can create new Inspection Tasks or link existing Inspection Tasks to the Compliance Recommendation. Values from the Compliance Recommendation fields populate fields in the Inspection Task.

The following tables list the Inspection Task fields that are populated automatically from these sources.

Table 1: Link Existing Inspection Tasks to Compliance Recommendations

Field	Value	Source
Desired Interval	The value in the Recommended Interval Scope field. **Note:** This field is populated with the value of the Recommended Interval Scope field only if the value in the Override Interval field is False.	Compliance Recommendation
Desired Interval Basis	Compliance Recommendation **Note:** This field is populated with the value of the Recommended Interval Scope field only if the value in the Override Interval field is False.	Compliance Recommendation
Task Details	The value in the Recommended Inspection Scope field.	Compliance Recommendation
Task Type	The value in the Task Type field.	Compliance Recommendation

Table 2: Link New Tasks to Compliance Recommendations

Field	Value	Source
Desired Interval	The value in the Recommended Interval Scope field.	Compliance Recommendation
Desired Interval Basis	Compliance Recommendation	Compliance Recommendation
Override Interval	False	Compliance Recommendation
Task Details	The value in the Recommended Inspection Scope field.	Compliance Recommendation
Task ID	The values in the Damage Mechanism and Task Type fields in the following format: <Damage Mechanism><Task Type>.	Compliance Recommendation
Task Type	The value from the Task Type field.	Compliance Recommendation
Asset Key	The key of the asset that the recommendation is linked to.	Compliance Recommendation
Last Date	User provided input. Default value is current date.	Compliance Recommendation

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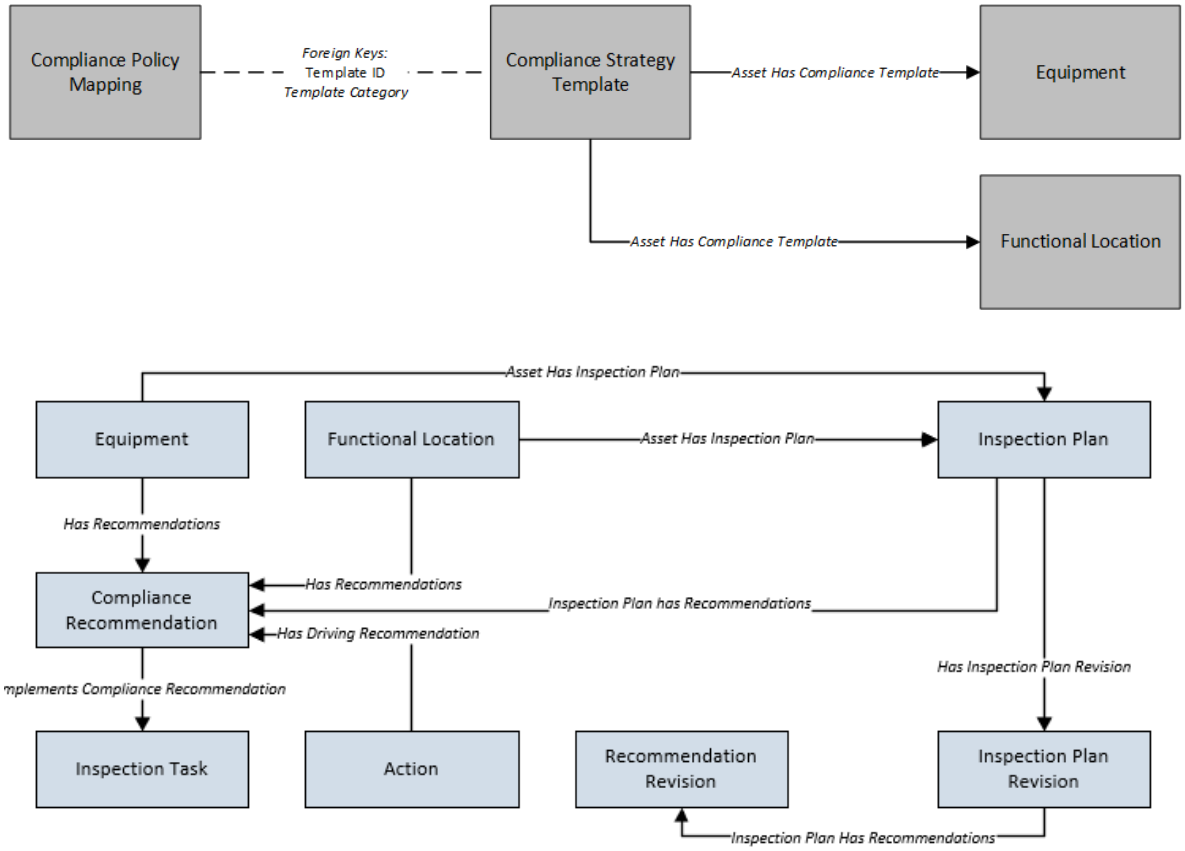
Data Models

Compliance Management Data Model

The following diagram illustrates how families are related within the Compliance Management data models. In the following images, boxes represent entity families, and arrows represent relationship families that are configured in the baseline database.



Asset Has Inspection Plan Relationship

The Asset Has Inspection Plan family links an asset to an Inspection Plan.

The table below provides a description of the relationship definitions that exist for the Asset Has Inspection Plan Relationships family.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Predecessor	Successor	Cardinality
Equipment	Inspection Plan	One to One
Functional Location	Inspection Plan	One to One

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Inspection Plan Has Recommendations Relationship

The Inspection Plan Has Recommendations family links Compliance Recommendations to Inspection Plans. This family also links the Recommendation Revision and the Inspection Plan revision.

The table below provides a description of the relationship definitions that exist for the Inspection Plan Has Recommendations family.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Predecessor	Successor	Cardinality
Inspection Plan	Compliance Recommendation	One to Many
Inspection Plan Revision	Recommendation Revision	One to Many

Has Inspection Plan Revision Relationship

The Has Inspection Plan Revision family is a relationship family that links the Inspection Plan to the Inspection Plan revision.

The table below provides a description of the relationship definitions that exist for the Has Inspection Plan Revision family.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Predecessor	Successor	Cardinality	Foreign Key
Inspection Plan	Inspection Plan Revision	One to Many	FK_HAIN_PR_INPL_INPL_R_N on the Inspection Plan Revision record.

Implements Compliance Recommendation Relationship

The Implements Compliance Recommendation family links Compliance Recommendations to Inspection Tasks.

The table below provides a description of the relationship definitions that exist for the Implements Compliance Recommendation family.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Predecessor	Successor	Cardinality
Inspection Task	Compliance Recommendation	One to One

Has Driving Recommendation Relationship

The Has Driving Recommendation family links Compliance Recommendations to Actions.

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The table below provides a description of the relationship definitions that exist for the Has Driving Recommendation family.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Predecessor	Successor	Cardinality
Action	Compliance Recommendation	One to One

Family Field Descriptions

Compliance Policy Mapping Records

The Compliance Policy Mapping family stores information related to the Compliance policy that is mapped to the Compliance Strategy Template.

The table below provides an alphabetical list and description of the fields that exist for the Compliance Policy Mapping family. The information in the table reflects the baseline state and behavior of these fields. This list is not comprehensive.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Family	Character	Defines the asset entity family to be mapped to the policy.	This field is required. This field is disabled and populated with the value of the asset family from Compliance Strategy Template records.
FK_COTE_HM_COST_T_COPO_M_N	Numeric	The Foreign Key field that is used to relate the mapping to the Compliance Strategy Template.	This field is disabled. This field does not appear in the datasheet.
Policy Node	Character	Defines the policy input node into which the defined entity will be mapped.	This field is user-defined. This field contains the node name of the input node in the mapped policy.
Template ID	Character	Stores the Template ID to which the mapping is related.	This field is populated with the Strategy Template ID field value.
Template Category	Character	Stores the Template Category to which the mapping record is related.	This field is populated with the Strategy Template Category field value.This field does not appear in the datasheet.

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Compliance Recommendation Records

The Compliance Recommendation family stores details related to Compliance Recommendations.

The table below provides an alphabetical list and description of the fields that exist for the Compliance Recommendation family. The information in the table reflects the baseline state and behavior of these fields. This list is not comprehensive.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Applicable Regulation	Character (255)	Stores the regulation type that is applicable to a task.	This field is populated from the Asset Technical Data. It contains a list of regulations which are linked to a task. This field is populated with a description of system codes stored in MI_INTGY_REGULATION system code table. This field is always disabled.
Certification	Character (255)	Stores the certification value.	The values in this field are populated from a drop-down list box and contains a list of system codes that exist in the MI_COMPLIANCE_STANDARDS system code table. In baseline, the Certification field populates the values which are referenced by MI_INTGY_REGULATION system code table. By default, it shows ZUS and BP.
Chamber	Character (255)	Stores information about the type of chamber.	This field contains a list of system codes that exist in the MI_CHAMBER system code table. The values in this field are populated from a drop-down list box. **Note:** The values are copied from Asset Technical Data.

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Field	Data Type	Description	Behavior and Usage
Comments	Character (255)	Stores the reason that a Compliance Recommendation is marked as Not Required.	When a Compliance Recommendation is marked Not Required, this field stores the reason that is entered by the user. This field is disabled when the Compliance Recommendation is in the Implemented state.
Damage Mechanism	Character (50)	Stores the Damage Mechanism from the Compliance Strategy record.	This field is disabled.
Inspection Strategy ID	Character (255)	Stores the ID of the Compliance Strategy record that generated the recommendation.	This field is disabled.
Recommendation ID	Character (255)	The unique ID assigned to the recommendation.	This field is populated automatically by business rules. This field is disabled.
Recommended Interval Scope	Numeric (Months)	Stores the Interval Scope value from the Compliance Strategy record.	This field is disabled when the Compliance Recommendation is in the Implemented state.
Recommended Inspection Scope	Text	Stores the Inspection Scope from the Compliance Strategy record.	This field is disabled when the Compliance Recommendation is in the Implemented state.
Source	Numeric	Stores the entity key of the source Compliance Strategy Template.	This field is populated with the Compliance Strategy Template name. This field is disabled.
Task Type	Character (50)	Stores the Task Type from the Compliance Strategy record.	This field is disabled when the Compliance Recommendation is in the Implemented state.

Compliance Strategy Records

The Compliance Strategy family stores information related to a compliance-based regulation or specification. The Compliance Strategy ID of these records are returned by policies to create Compliance Recommendations when creating or updating an Inspection Plan.

The table below provides an alphabetical list and description of the fields that exist for the Compliance Strategy family. The information in the table reflects the baseline state and behavior of these fields. This list is not comprehensive.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

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Field	Data Type	Description	Behavior and Usage
Compliance Strategy Description	Character	Stores the description of the Compliance Strategy record.	This value in this field is user-defined.
Compliance Strategy ID	Character	Stores the ID of the Compliance Strategy record.	The value in this field must be unique. This field is required. This field is disabled after saving.
Degradation Mechanism	Character	Stores the Degradation Mechanism associated with the Compliance Strategy record.	This field is populated by the MI_DEGRADATION_MECHANISM_TYPES system code table.
Inspection Task Type	Character	Stores the Task Type of the Tasks contained in the Compliance Strategy record.	This field is populated by a list of values from the Task Type ID field of the Task Types family where the reference field is INSPECTION_STRATEGY.
Recommendation Inspection Interval	Numeric (Months)	Stores the Inspection Interval of the Compliance Strategy Record.	This field can be overridden by the user.
Recommended Inspection Scope	Text	Stores the Inspection Scope of the Compliance Strategy record.	None

Compliance Strategy Template Records

The Compliance Strategy Template family stores information related to Compliance Strategy Templates that are created by the user. When linked to an asset, these records indicate which policy to execute to generate an Inspection Plan.

The table below provides an alphabetical list and description of the fields that exist for the Compliance Strategy Template family. The information in the table reflects the baseline state and behavior of these fields. This list is not comprehensive.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

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Field	Data Type	Description	Behavior and Usage
Asset Family	Character	Lists families that are included in the Asset Has Compliance Template relationship.	This field is populated by a list of families that are included in the Asset Has Compliance Template relationship. The value in this field is used to enforce asset records that are linked to that template. When a new record is created, this field is enabled. When the record is saved, this field is disabled.
Asset Lookup Query	Character	Stores the catalog path for the query to look up assets.	This field is disabled and populated automatically when you select a catalog query for a Compliance Strategy Template.
Category	Character	Stores the name of the compliance category.	This field is populated by a list of all available Compliance Strategy Template Categories. Users can add new categories using the Add Caption field. After the user saves the Compliance Strategy Template, this field is disabled. This field is required.
Description	Text	Contains the user-defined description for a Compliance Strategy Template.	By default, this field does not contain a value. Optionally, you can enter a value in this field.
Name	Character	Defines the name of a specific template.	This field is required. This field is populated by the user-defined name of the Compliance Strategy Template. The value in this field must be unique.
Policy Name	Character	Contains the name of the policy that is selected for the strategy.	This field is required. This field is populated by a list of all available policies in APM. The value in this field is the policy name of the selected policy record.
Policy Link	Character	Contains the hyperlink that is used to navigate to the selected policy.	This field is populated by the hyperlink that navigates to the Policy Designer page for the selected policy.

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Inspection Plan Records

The Inspection Plan family stores details of Inspection Plans. This family stores the states of recommendations that are on the Inspection Plans.

The table below provides an alphabetical list and description of the fields that exist for the Inspection Plan family. The information in the table reflects the baseline state and behavior of these fields. This list is not comprehensive.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
MI_SM_STATE_ENTERED_D	Date	Stores the date of the Inspection Plan state change.	This field is populated automatically.
MI_SM_STATE_ID_C	Character	Stores the ID of the current state of the Inspection Plan.	This field is populated automatically.
MI_SM_STATE_KEY_N	Numeric	Stores the key of the current state of the Inspection Plan.	This field is populated automatically.
MI_SM_STATE_OWNER_ID_C	Character	Stores the ID of the user who has been assigned to the state.	This field is populated only if a user assigns the state to another user.

Inspection Plan States

The following values are used to define the states of Inspection Plans.

State ID	Caption	Initial State?
MI_PROPOSED	Proposed	True
MI_APPROVED	Approved	False
MI_MODIFIED	Modified	False

Inspection Plan State Operations

The following operations can be performed on Inspection Plans to change the states.

Operation ID	Caption	Predecessor State	Successor State	Is Reserved
MI_APPROVE	Approve	Proposed	Approved	False
MI_APPV_MODIFIED	Approve	Modified	Approved	False
MI_MODIFY	Modify	Approved	Modified	True

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Inspection Plan Revision Records

The Inspection Plan Revision family stores information regarding revisions of Inspection Plans.

The table below provides an alphabetical list and description of the fields that exist for the Inspection Plan Revision family. The information in the table reflects the baseline state and behavior of these fields. This list is not comprehensive.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Basis for Revision	Text	Stores the text that is entered by the user when updating an Approved Inspection Plan.	This field is populated by entering a Reason for Revision in the dialog box that appears when updating an Inspection Plan that is in the Approved state. This field is disabled in the datasheet.
FK_HAIN_PR_INPL_INPL_R_N	Numeric	Foreign Key fields that stores the entity key of the Inspection Plan,	This field is disabled. This field does not appear in the datasheet.
Revised By	Numeric	Stores the entity key of the user who modified the Inspection Plan.	This field is populated by the name of the user who modified the Inspection Plan. This field is disabled.
Revision Date	Date	Stores the date of the revision of the Inspection Plan.	This field is disabled.

Suggested Compliance Templates Records

The Suggested Compliance Template family stores information related to assets and their suggested Compliance Strategy Templates.

The table below provides an alphabetical list and description of the fields that exist for the Suggested Compliance Templates family. The information in the table reflects the baseline state and behavior of these fields. This list is not comprehensive.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

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Field	Data Type	Description	Behavior and Usage
Asset Key	Numeric	The entity key of an asset for which Compliance Strategy Templates are suggested.	This field does not appear in the datasheet.
Suggested Template Key	Numeric	The entity key of the suggested Compliance Strategy Template.	This field does not appear in the datasheet.

Recommendation Revision Records

The Recommendation Revision family stores information from the related RBI and Compliance Recommendation records and their related Inspection Tasks. These records store information when an Inspection Plan that is in the Approved state is moved to the Modified state.

This topic provides an alphabetical list and description of the fields that exist for the Recommendation Revision family and appear in the Recommendation Revision datasheet unless otherwise specified. This list is not comprehensive.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Damage Mechanism	Character (50)	Stores the Damage Mechanism of the original Recommendation.	This field is disabled.
Inspection Strategy ID	Character (255)	Stores the ID of the Inspection Strategy record from which the original Recommendation was generated.	This field is disabled.
Inspection Task Type	Character (255)	Stores the Task Type from the related Inspection Task.	This field is disabled.
Non Recurring?	Boolean	Indicates whether the Recommendation is to recur.	This field is disabled.
RBI Recommendation Methodology	Character (255)	Indicates the methodology used to create the Recommendation.	• For RBI Recommendations, the value in this field can be RBI 580 or RBI 581. • For Compliance, the value in this field is set to the name of the Compliance Strategy Template.
Recommendation ID	Character (255)	Indicates the unique ID that is assigned to the Recommendation.	This field is populated by automatically by business rules. This field is disabled.

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Field	Data Type	Description	Behavior and Usage
Recommended Inspection Scope	Text	Stores the Inspection Scope that populated the original Recommendation.	This field is disabled.
State	Character (255)	Stores the State ID of the original Recommendation.	This field is populated by the caption of the state. The field is disabled and does not appear in the datasheet.
Task Description	Text	Stores the description from the related Inspection Task.	This field is disabled.
Task Desired Interval	Numeric	Stores the Desired Interval field value from the related Inspection Task.	This field is disabled.
Task Desired Interval Basis	Character (1000)	Stores the Desired Interval Basis from the related Inspection Task.	The value in this field is the description of the corresponding system code from the INSM System Code Table. The field is disabled.
Task Desired Interval UOM	Character (50)	Stores the Desired Interval UOM from the related Inspection Task.	This field is disabled.
Task Details	Text	Stores the details from the related Inspection Task.	This field is disabled.
Task ID	Character (255)	Stores the Task ID from the related Inspection Task.	This field is disabled.
Task Last Date	Date	Stores the Last Date from the related Inspection Task.	This field is disabled.
Task Override Interval	Boolean	Stores the Override Interval from the related Inspection Task.	This field is disabled.
Task Next Date	Date	Stores the Next Date from the related Inspection Task.	This field is disabled.
Task Reoccurring	Boolean	Stores the Reoccurring flag value from the related Inspection Task.	This field is disabled.

Family Search Configuration

Family Search Configuration

The following families for Compliance Management are included in the Global Search:

- Compliance Policy Mapping

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- Compliance Recommendation
- Compliance Recommendation Mapping
- Compliance Strategy
- Compliance Strategy Template
- Inspection Plan

By default, the search results for all other families for Compliance Management are excluded from Global Search.

Note: You can configure a family to be included or excluded from the Global Search using the Search Configuration.

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