GE VERNOVA

Asset Performance Management

On-Premises APM

V5.2.2.0.0

Deferral Configuration

Contents

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Chapter 1

Overview

Topics:

Overview of the Deferral Workflow

The Deferral workflow provides a manageable and configurable solution for postponing time-based records, such as tasks. When enabled and configured, the workflow allows you to formally request a deferral by entering details such as the reason for the request and desired deferred date. The workflow also supports a state-driven review and approval process before updating the postponed record.

In the baseline APM database, Deferral Configuration is provided for the following families:

- Inspection Task

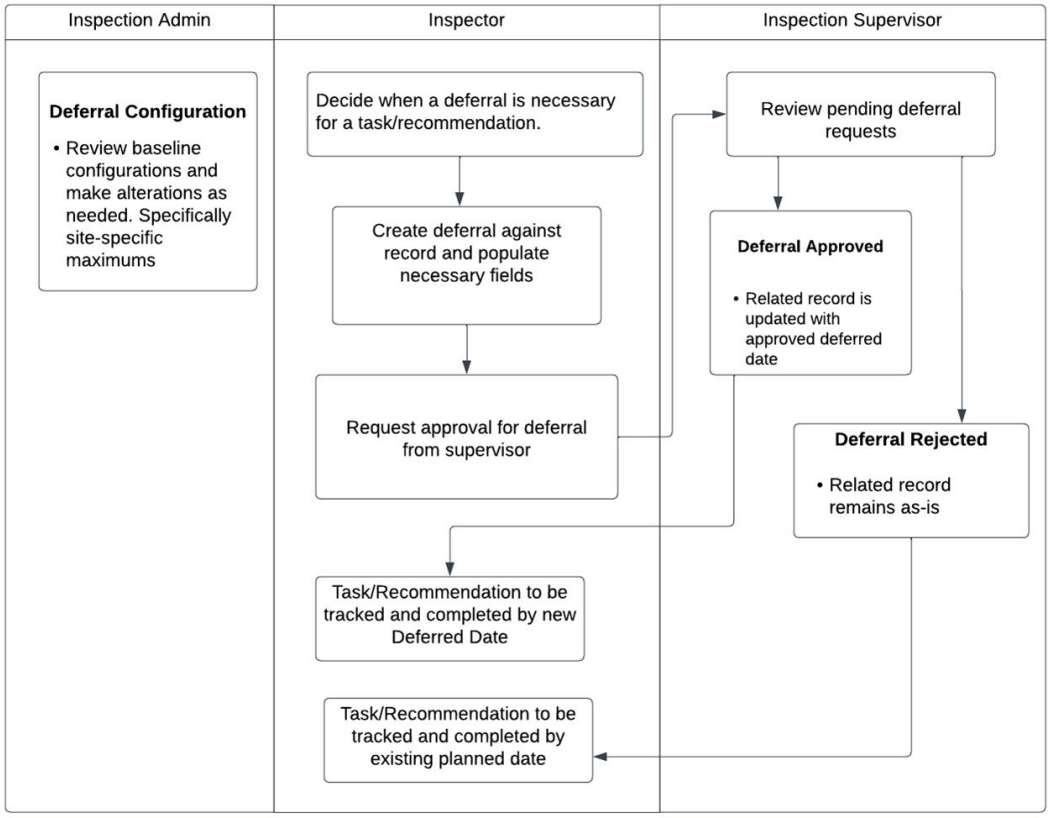
Note: The baseline configuration is provided for the above listed families, however, the Deferral workflow is not enabled by default. To enable the workflow, navigate to the Deferral Configuration Admin page and select the **Enable Deferral** option for the given family to enable the workflow.

Chapter 2

Workflow

Topics:

Workflow


Inspection Admin
Inspector
Inspection Supervisor
Deferral Configuration
• Review baseline configurations and make alterations as needed. Specifically site-specific maximums
Decide when a deferral is necessary for a task/recommendation.
Create deferral against record and populate necessary fields
Request approval for deferral from supervisor
Review pending deferral requests
Deferral Approved
• Related record is updated with approved deferred date
Deferral Rejected
• Related record remains as-is
Task/Recommendation to be tracked and completed by new Deferred Date
Task/Recommendation to be tracked and completed by existing planned date

Chapter 3

Admin

Topics:

Access the Deferral Configuration Page

Procedure

In the **Applications** menu, navigate to **ADMIN** > **Application Settings** > **Deferral Configuration**.
The **Deferral Configuration** page appears, displaying the **Deferral Configuration** workspace. You can view the configurations for each family that participate in the Has Deferral relationship family in the left navigation, and modify any necessary fields.

In the baseline APM database, Deferral Configuration is provided for the following families:

- Inspection Task

Note: The baseline configuration is provided for the above listed families, however, the Deferral workflow is not enabled by default. To enable, select the **Enable Deferral** option for the given family to enable the workflow.

Create or Modify a Deferral Configuration Record

When you view the **Deferral Configuration** page, if there are families that participate in the **Has Deferral** relationship, but are not included as part of the APM baseline database configuration, you can create the Deferral Configuration for that family. In addition, you can also modify settings of existing configuration records if desired.

Before You Begin

- Ensure that you have identified fields from the selected family, which will represent the original planned date and the updated deferred date.

Procedure

1. Access the Deferral Configuration Workspace.
2. Select  .
   You can now modify the Deferral Configuration records.
3. Select the desired family from the left navigation.
4. As needed, enter the values in the following fields:
   a. **Enable Deferral**: Controls whether the workflow for Deferral is enabled with the module specific pages.

      Note: This does not prevent the creation of deferrals from record manager.
   b. **Planned Date Field**: Identifies which field from the selected family will represent the original planned date. On creation of a deferral the value from this field will be mapped to the Planned Date on the Deferral.
   c. **Deferred Date Field**: Identifies which field from the selected family will represent the deferred date. On approval of a deferral the Deferred Date from the Deferral record will be mapped to this field.
   d. **Deferred Date Basis Field**: Identifies which field from the selected family will represent the basis field that will store the ID of the Deferral upon approval.

      Note: This is an optional field.

5. Define Deferral Limits By Site.
6. Select  .
   The Deferral Configuration is saved for the selected family.

Define Deferral Limits By Site

About This Task

For each Deferral Configuration, you can set of site-specific deferral limits that restrict the number of consecutive deferrals that can be approved before a time-based record is executed. Each Deferral Configuration can include following types of limits:

- Site-specific limit: Limits that apply to specific sites.
- Global limit: A top-level limit that applies to all records where the site of those records does not exist in any other Deferral Limit for the current Deferral Configuration.

For example, consider the following configuration for a given family:

- Global limit: 3
- Site-specific limit:
  - Site B: 2
  - Site C: 2

When approving deferrals for a record that belongs to Site A, you cannot approve more than 3 consecutive deferrals. If you are approving deferrals for a record in either Site B or Site C, you cannot approve more than 2 consecutive deferrals.

Procedure

1. Access the Deferral Configuration Workspace.
2. Select  .
   You can now modify the Deferral Configuration records.
3. Select the desired family from the left navigation.
4. In the **Deferral Limit By Site** section, enter a value for the Global limit. By default, the Global Limit has a default value of 3.
5. Select 

   to add an additional configuration.
   A new row is added with a dropdown list from which you can select the sites.

   Tip: Deferral Limits can be grouped together by site. For example, if you have multiple sites that have the same Deferral limit value, you can select each applicable site from the Sites dropdown list.
6. Select the desired site(s) for the limit.
7. Enter the the **Deferral Limit** value.
8. Select  .
   The Deferral Configuration is saved for the selected family.

Chapter 4

Reference

Topics:

Family Field Descriptions

Deferral Configuration

The table below provides an alphabetical list and description of the fields that exist for the Deferral Configuration 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. See the Site Filtering section of the documentation for more information.

Field	Data Type	Description
Deferred Date Basis Field	Character	Stores the field ID from the target family which represents the Deferred Date Basis field which will store the ID of the most recently approved deferral
Deferred Date Field	Character	Stores the selected field on the target family where the Deferred Date can be found.
Enable Deferral	Boolean	Indicates whether the configuration for this family is enabled. For certain pages this may control whether the Deferral History section is displayed or not
Max Deferral Setting	Text	Stores JSON which defines the maximum deferral settings by site.
Planned Date Field	Character	Stores the selected field on the target family where the Planned Date can be found.
Target Family	Character	Stores the desired target family of the deferral (i.e., Inspection Task).

Deferral

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

Field	Data Type	Description
Approved By	Character	Stores the user who approved the deferral.
Asset ID	Character	Stores the Asset ID of the deferral

Field	Data Type	Description
Comments	Text	Stores user entered comments for the deferral.
Deferral ID	Character	Stores the ID of the deferral record.
Deferral Number	Numeric	Stores the current iteration of deferrals for the deferred item.
Deferred Date	Date	Stores the date the item will be deferred to.
Deferred Record ID	Character	Stores the Entity ID of the record being deferred.
Planned Date	Date	Stores the date the deferred item was originally planned for.
Reason	Character	Stores the selected reason for the deferral.
Requested By	Character	Stores the user who requested the deferral.

Catalog Folder

Deferral Queries Folder

The Catalog folder `\\Public\Meridium\Modules\Deferral\Queries` contains the following items.

Query	Behavior and Usage	Required Fields
Deferrals for Asset	Displays the Deferrals related to an asset.	• MI_DEFRL_ID_C (Deferral ID) • MI_DEFRL_DEF_REC_ID_C (Deferred Record ID) • Deferred Record Key • MI_DEFRL_DEF_REC_FMLY_ID (Deferred Record Family ID) • ENTY_KEY • ENTY_ID • STATE_ID **Note:** If a new Family is added to the Has Deferrals relationship, the Foreign Key field representing that association must be added to the query in the **Deferred Record Key** field.
Deferral History	Displays the historical collection of Deferrals against a record.	None
Manage Deferrals Parameters	Provides the parameters required in the Deferral page.	None