

Planning Card

Truck and Storeroom Scoping Planning Card

This card gets your per-user storeroom scope designed on paper before anyone touches a screen. It does not build the scope. It makes sure you have decided the six things that determine whether the scope holds up in production. Fill it in first. Writing the conditions and the field-level build is the Playbook.

Work it top to bottom. The first two sections are decisions. The middle two are inventories you have to take. The last two are how you prove it works. The section that catches people is section four, because a scope you built perfectly is defeated by one broad group you forgot the user was in.

01 1. Ownership attribute

You need one field that ties a tech to their assigned storeroom, and Maximo has no native assigned-truck field, so this is a real choice. The field I recommend is the Inventory Owner on the storeroom record, `LOCATIONS.INVOWNER`. Instead of putting the storeroom on the person, you put the person on the storeroom, by setting the tech as the Inventory Owner of their truck's storeroom. It already exists on every storeroom, it references the person ID directly, and it means exactly the right thing. Avoid the Labor and Person location fields, which often will not accept a storeroom-type location without changing the field. If Inventory Owner is already in use in your shop, the clean fallback is a custom attribute on the Labor record, and the last resort is `MAXUSER.DEFSTOREROOM`, the self-service default storeroom field, which works but is hard to manage day to day and changes that feature's behavior. Whatever you pick has to be populated for every scoped user, because a blank value scopes them to nothing.

Field chosen

If custom, where it gets set

Populated for every scoped user (Y/N)

02 2. Scoped population

Name the role and the people who get scoped. One scoping group, not one per truck. Decide where the truck assignment comes from, because that is the source you will maintain forever.

Scoping group or role

Headcount

Source of truth for each person's assignment

03 3. Objects and views to cover

List every object and view a scoped user can reach the storeroom data through. Inventory, item availability and balances, issues and transfers, and receipts are the usual set, but the exact list depends on your applications and customizations. The field that holds the storeroom is not named the same on every object, so each one needs its own matching condition. Miss one and that is your leak.

List every other security group the scoped users belong to. For each, answer one question: does it open any object from section three with no condition. If yes, that group defeats your scope, because access combines, higher privileges prevail, and unrestricted paths defeat scoped ones. Either strip those objects out of that group or keep the user out of it. Do not forget MAXEVERYONE, the everyone group, which always combines even when marked independent.

[illegible]

Supervisors break the per-user scope because they cover a team. Do not build a security group per supervisor. Decide whether a supervisor covers a whole site, work zone, or only their team, and if it is the team, name the team source you already maintain. Build one supervisor group and scope their restrictions to include what they cover.

Supervisor group name

TEST USER	ROLE (TECH OR SUPERVISOR)	PASSED FULL-PROFILE TEST (Y/N)
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Reviewed by and date

Brock Industries