







Configurable Maximo

Sample what you can do in Maximo without customization



By Jason Uppenborn MaxTECH, Tulsa, Nov 5, 2019



About the presenter

Jason Uppenborn, Managing Consultant

- 15 years of Maximo Implementation Experience
- Certified on 5.2 through 7.6
- Experience with:
 - SQL
 - Automation Scripts
 - Java
 - Workflow
 - Integration
 - Configuration Items
- Loves to hear about cool things you can do with Maximo!











Agenda

- Purpose
- Configurations versus Customizations
- Configurations Overview (Fast!)
 - Business Need
 - Solution
- Conditional Expression Domains Demo
 - Business Need
 - Solution, in detail
- Q&A









Details, details...

Purpose: Tease you with what you can do without customizing

- Smaller 'solutions' were generally selected
- Will not cover the technical details here
 - Exception: Conditional Expression Domain
- Focus was on value, not complexity
- Can follow-up on any technical needs or details









Configuration versus Customization

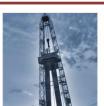
Configurations

- Performed with standard "inside" Maximo tools
- Requires no programming
- Very likely to be upgradeable with new versions
- Maintainable by Maximo "super-users" / administrators

Customizations

- Modifies Maximo with "outside" tools
- Requires Java programming and EAR deploys
- Will require investigation when upgrading Maximo
- Changes OOTB coded behaviour









Configuration versus Customization

Configurations

- Adding attributes and relationships using DB Config
- Changing screens in App Designer
- Crossovers
- Conditional Expressions
- Escalations
- Workflows
- Custom Views



??????

- Automation Scripts
- Integration
 - Java
 - XSL
 - Autoscripts

Customizations

- Change business logic or validation
- Java
 - MBOs
 - Field Listeners / Validation Classes
 - Beans













Configurations









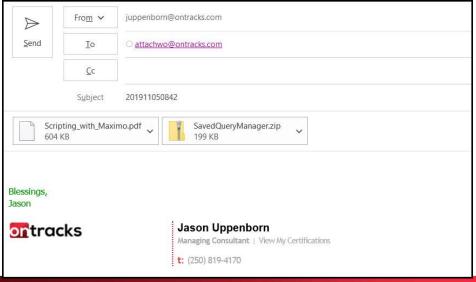
Configuration 1: Scan and Attach Solution



Problem:

- Scanning and attaching a document took 10 minutes or more
- Attachments in Maximo needed to be added one at a time Solution:

Use the email listener to automatically attach













Configuration 2: Saved Query Manager



Problem:

- You can only change your own Saved Queries
- Preference to not have MAXADMIN login to PROD
- Queries are used across the system and may need changes

Solution:

 New Application to manage Saved Queries, available to System Administrators

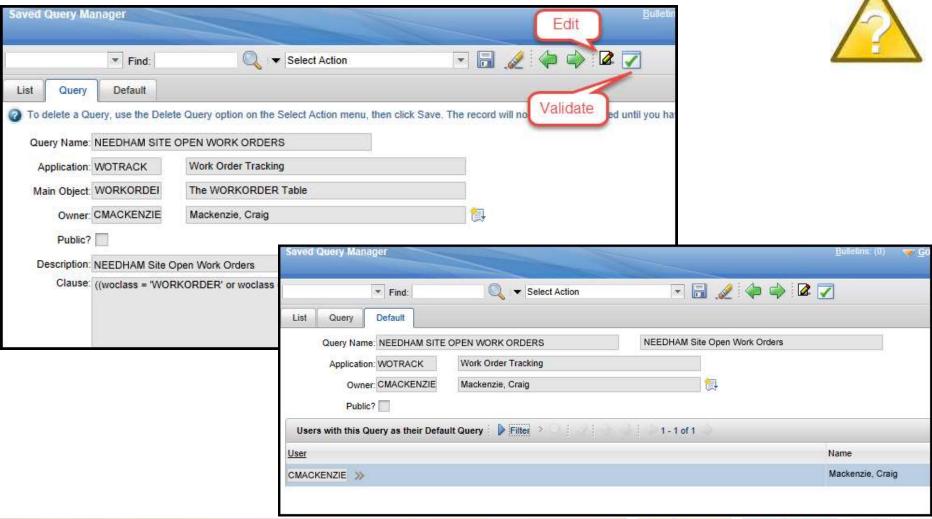








Configuration 2: Saved Query Manager





Configuration 3: Workflow Mass Update



Problem:

- Users change roles and companies and have active Workflow assignments
- Changes to Workflow assignments are one-by-one
- May need to mass Start or Stop a Workflow

Solution:

Mass Update Workflow

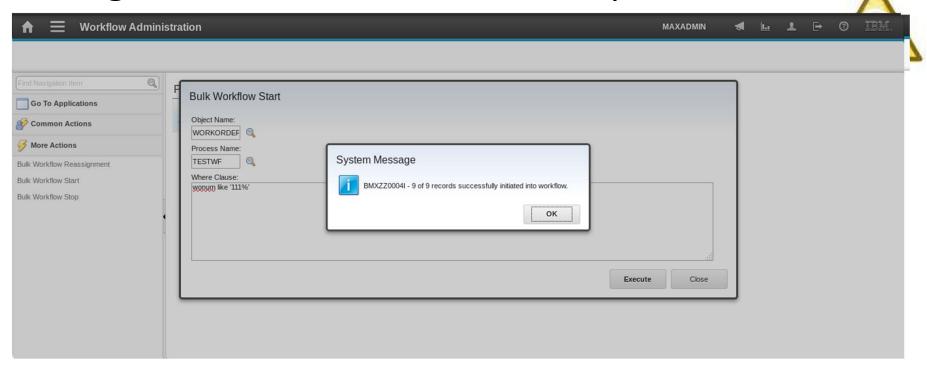








Configuration 3: Workflow Mass Update











Configuration 4: Maximo Up/Down Page



Problem:

- Maximo URLs and Utilities were not easily accessible
- The current status of each environment is unknown Solution:
- A web page that shows the up/down status for each environment and links to tools and contacts

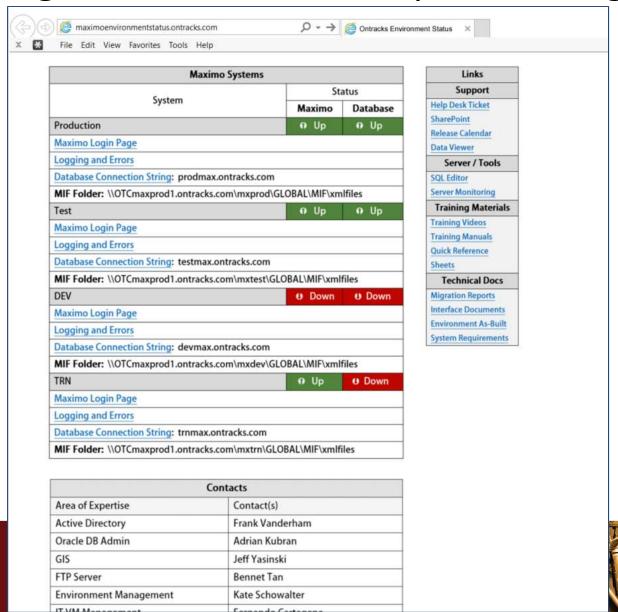








Configuration 4: Maximo Up/Down Page













Configuration 5: Inventory Balance Details Report

Problem:

- Provides a single inventory value per day during the date range
- Shows all transactions during a date range

Solution:

Inventory Balance Transaction Details Report









Configuration 5: Inventory Balance Details Report





Inventory Transactions and Balance

Site: NEEDHAM

Storeroom: NEEDHAM Main Storeroom

Inserts

Day	Item Num	Capital	Cost (\$CAD)	Transaction	GL Credit Account	GL Debit Account
29	7719	No	\$0.00	INSERTITEM	1000.563.54614	1000.556.84950
		Total Inserts	\$0.00			

Receipts

Day	PO Number	Item Num	Capital	Cost (\$CAD)	GL Credit Account	GL Debit Account
1	16-12356	1294	Yes	\$3,050.00		1000.556.84950
2	16-15436	1664	No	-\$927.50		1000.556.84950
5	16-15894	5636	No	\$506.21		1000.556.84950
5	16-15274	1238	No	\$573.00		1000.556.84950
5	16-15445	1238	No	\$307.00		1000.556.84950
5	16-15286	1238	No	\$376.00		1000.556.84950
5	16-15034	1240	No	\$255.00		1000.556.84950
6	16-15254	1430	No	\$105.00		1000.556.84950
6	16-15222	5640	No	\$274.00		1000.556.84950
0	16-15435	3040	INO	\$420.22	. 100000000000	1000.556.84950









Configuration 6: WO Open Records Table



Problem:

- Locating related Work Orders, Upcoming PMs and other records is cumbersome and requires several searches.
- Work was being executed without knowledge of PMs and related work.

Solution:

Simple table showing Work Orders, PMs and other relevant records



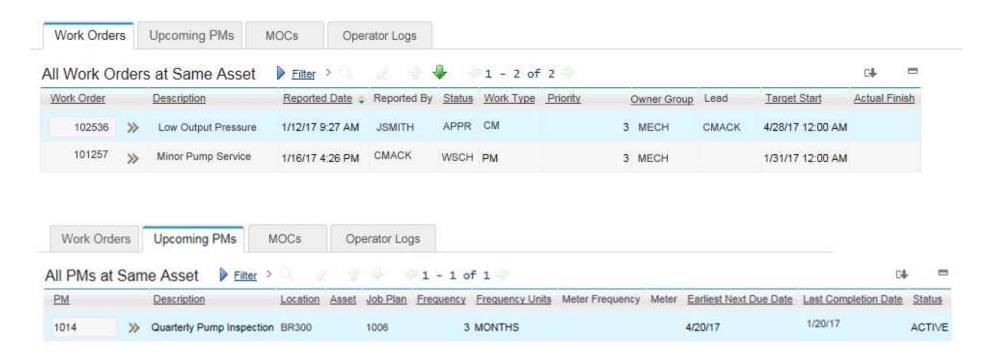






Configuration 6: WO Open Records Table













Configuration 7: Sync PRs and Reservations

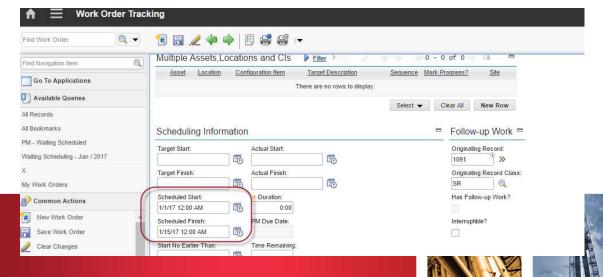
Problem:

- A Scheduled Start or Finish Date is modified, Maximo's Reservations and PRs aren't updated accordingly
- Information between Maintenance and Supply Chain managed automatically

Solution:

- Automatically update reservations and PRs when dates are

changed.







Configuration 8: Send Emails with PDF Attachments

Problem:

- Emailing a PO in Maximo takes several minutes and many mouse clicks
- Technicians want the Work Order Details for the Work Orders they are assigned on their phone

Solution:

Use a Communication Template with a PDF output of a report

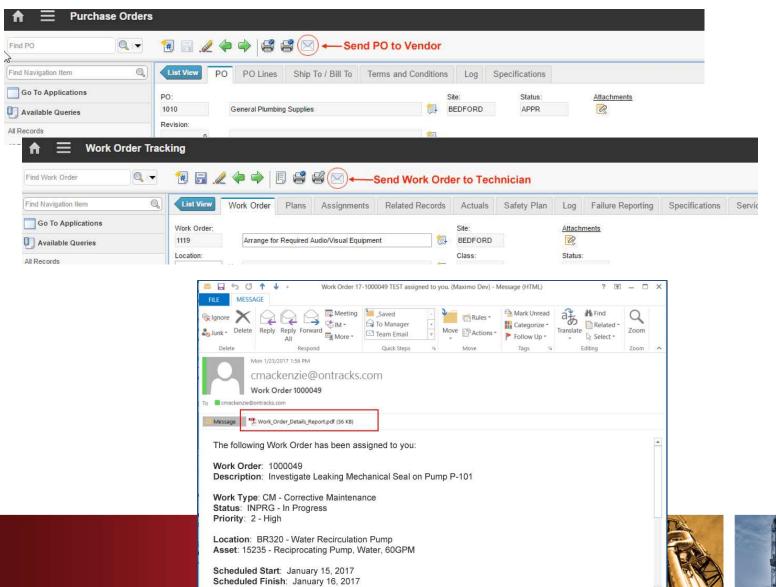








Configuration 8: Send Emails with PDF Attachments







Configuration 9: Communication Template Table Generator

A

Problem:

 Want to be able to send a list of results by email using a Communication Template (reports are too heavy and not flexible, bind variables won't work)

Solution:

- A Table Generator is created for each Child object along with the appropriate relationships
- The Communication Template binds to the generated tables







Configuration 9: Communication Template tracks

Table Generator











Configuration 10: Auto Update Start Centers

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Problem:

- A start center template was updated, and the business wanted to make sure that users were using the latest / current version of that template.
- Users must knowingly pull down updates on Start Centers

Solution:

- Start Center Update Utility

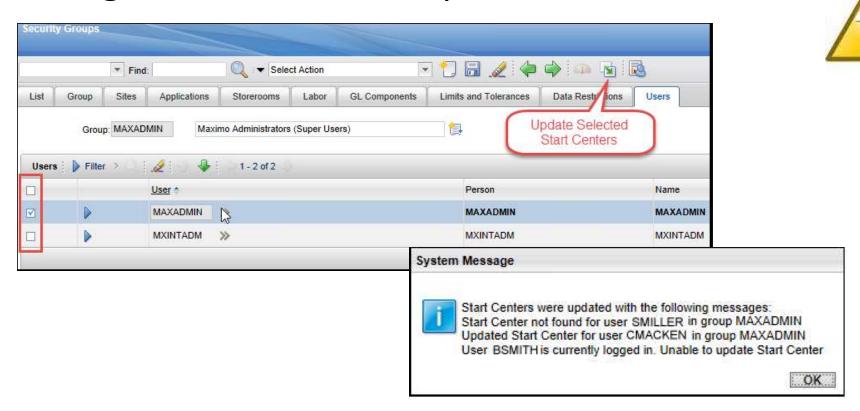








Configuration 10: Auto Update Start Centers











Conditional Expression Domain









Business Need

- Dates
 - Future
 - Past
 - Between dates in other fields
- Text
 - Length
 - Character / word content
- Numbers
 - Numeric Range Domain alternative









Solution: Conditional Expression Domain

- Validation via Conditional Expression / SQL Where Clause
- DRY Don't Repeat Yourself
- Minimize code changes
- Configuration Items (CIs) required
 - Messages
 - Conditional Expressions
 - Automation Script with Attribute Launch Points
- Limitation: Lookups not supported









Conditional Expression Domain Demo

- Require WO descriptions to have 2 words separated by a space
 - Test! Test! Test!
 - This is a good description
 - How's this
 - idk
 - Wheredidallthe, spaces go?









Vote for this RFE!

- Conditional Expression Domains
 - RFE ID: 129501
 - Currently has 3 votes
- (nee) Date Domains
 - RFE ID: 69615
 - Currently has 15 votes









Questions?

Are you looking for more information or have follow-up questions?

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