



(Communication Template) Table Generator

Including tables of data in Maximo email notifications

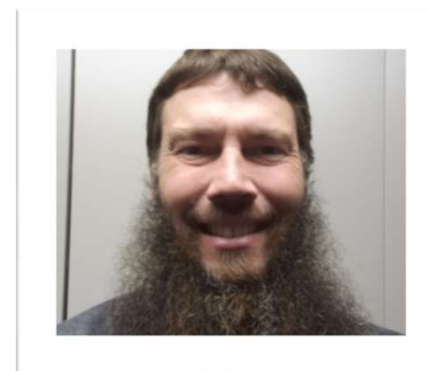
By Jason Uppenborn

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

- Business Need: Send a list by email from Maximo
 - Why OOTB options don't work
- Solution: (Communication Template) Table Generator
 - Solution Walkthrough
- Use Case



Objective: Send a list by email from Maximo

| Main Object | Related Lists |
|----------------------------|--|
| Work Order | Child WOs / Tasks Multi Assets / Locations Work Logs |
| MOC, Work Order, PO, etc | Workflow Memos |
| PR, PO, etc | PR, PO, etc Lines |
| User, Person, Labor | Assigned / referencing records |
| Operator Logs / Shift Logs | Log Entries + Related Work Orders Console Notes |



Business Need: Email a list from Maximo

- Reports don't work
 - Too "heavy"
 - Require user to open attachment / follow link
 - Not flexible enough
- Regular bind variables in Comm Templates don't work
 - :Relationship.Attribute brings back a single value
 - Value is random when Relationship finds many rows



Solution Walkthrough – High Level Design

Out of the box

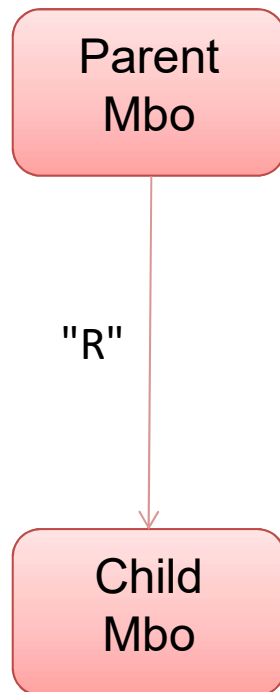
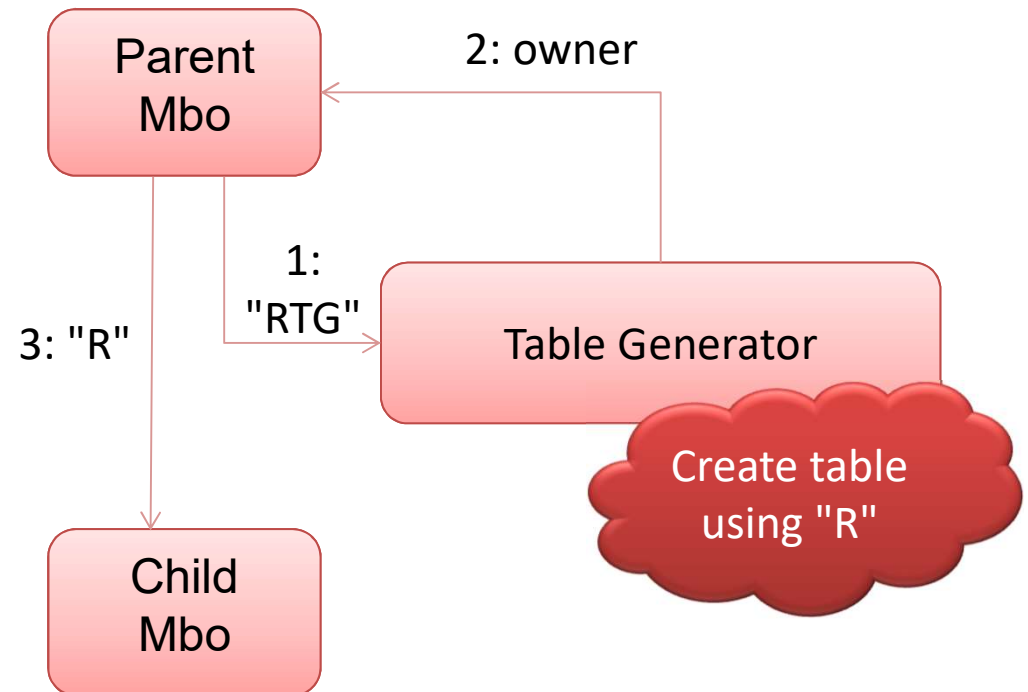
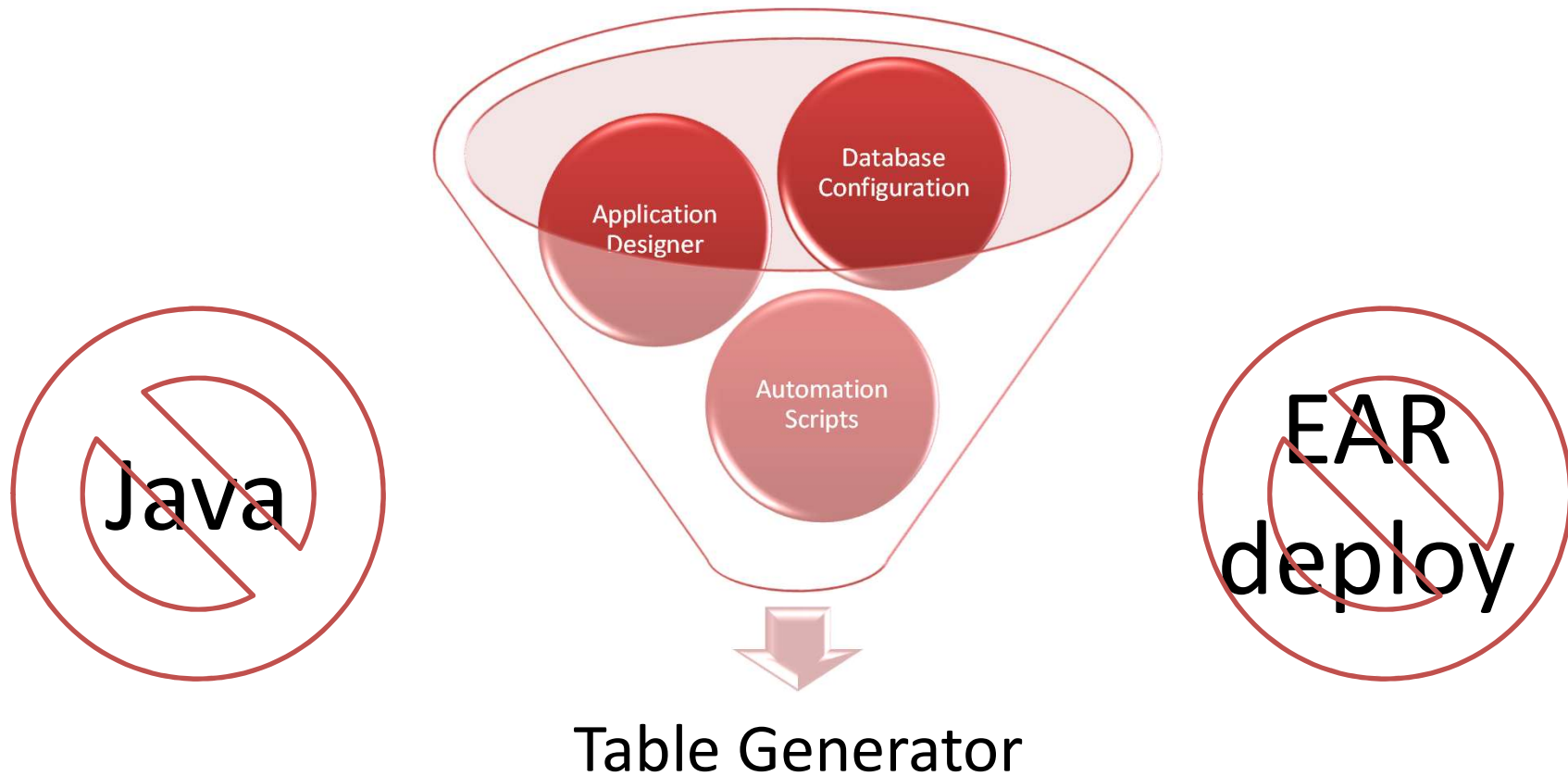


Table Generator



Solution Walkthrough – Components



Use Case: Orphaned Records Problem

- Situation: Maximo User gets deactivated
- What records were assigned to that User's Person?
 - Work Orders
 - PMs
 - Scheduled Reports
- Advise Administrators so affected records can be reassigned

Compliance Risk!



Use Case: Orphaned Records Solution Overview

- Relationships
 - from PERSON to child object
 - from PERSON to Table Generator
- Table Generator for relationship to child object
- Communication Template with bindings to generated table
 - Rich Text Viewer control, for demo purposes



Use Case: Orphaned Records, Child Relationships

Object
PERSON

The Person Table

Status

Relationships

Filter

>

1 - 2 of 2

Relationship

Child Object

Where Clause

Remarks

> OTCRESPONSIBLE4WOS

WORKORDER

historyflag = 0 and status not in ('COMP

Work Orders this Person is responsible

> OTCRESPONSIBLE4WOSTG

OTCTABLEGEN

tablename = 'WOS4PERSON'

Table Generator for WOs this Person is

New Row

- Relationship from PERSON to child object
- Relationship from PERSON to Table Generator



Use Case: Orphaned Records, Table Generators

Table Definition

Table Name

WOS4PERSON

Work Orders the Person is responsible for

Relationship

OTCRESPONSIBLE4WOS

Header

```
<table style="font-family: arial, sans-serif; border-collapse: collapse; width: 100%;">
  <tr style="border: 1px solid #dddddd; text-align: left; padding: 8px;">
    <th>WO</th>
    <th>Description</th>
    <th>Status</th>
```

- Table Generator for child object



Use Case: Orphaned Records, Comm Template

Subject
:personid (:displayname) is responsible for these wor

Message

Font Size Format None

Dear So and So:

:personid (:displayname) is responsible for these work orders

:otcresponsible4wostg.generatedtable

- Communication Template on PERSON with bindings to generated tables



Use Case: Orphaned Records, Sample Output

| WO | Description | Status | Lead | Owner | Supervisor |
|------|--------------------------------------|--------|------|------------------------|------------|
| 1087 | Request for OS upgrade to Windows XP | APPR | () | WILSON (Mike Wilson) | () |
| 4200 | Annual Pump Maintenance | APPR | () | WILSON (Mike Wilson) | () |
| 4201 | Inspect all pumps | WAPPR | () | WILSON (Mike Wilson) | () |
| 4202 | Fire Extinguisher Inspection | WAPPR | () | WILSON (Mike Wilson) | () |



Questions?

Contact Us

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Thank you!

