

# MAXICLOUD ESSENTIALS

## FEATURE GUIDE



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## Scope

This document describes the installation and configuration of the features within the MaxiCloud Essentials, an accelerator designed and created by BPD Zenith to improve Maximo's usability by adding or enhancing features within Maximo.



## What is MaxiCloud Essentials

MaxiCloud Essentials is an add-on for Maximo Asset Management 7.6.1.x and Maximo Manage 8.x.

With MaxiCloud Essentials installed, users and system administrators will experience benefits when using their Maximo system, making their use of the product more efficient and enjoyable.

### MaxiCloud Features

	<b>Product, feature, or service</b>	<b>Description</b>
1	Drag & Drop Attachments	Drag and drop attachments uses the base functionality of attachments in Maximo but improves upon the ease at which the feature may be used. Opposed to opening the attachments and browsing through the folder system to find your file, you are able to simply drag the file you wish to attach and place it in the Drag and Drop area, as shown below.
2	Gallery Tab	The gallery tab is new page that is utilized as a visual hub for all attachments associated with a given database record, including the likes of people, assets, and safety bulletins. Any of the files that are attached to the record will be displayed as shown below in the gallery tab, informing the user of the document id, description, owner, and information about its creation.
3	Workflow App Enhancements	The Workflow Admin application has introduced a number of new filterable columns into the list tab. Fields such as Invoice Number, Purchase requisition number, Purchase order number, Work orders number, and Company number have been included. The user will no longer need to waste time searching for related workflows as these filterable attributes allow the user to search for workflows that are associated with specific items in the database.
4	People App Auto Sequencing	In the Person Groups tab of the People application, MaxiCloud has fixed and issue with regards to sequencing.

5	Work Order Purchasing Summary Tab	The Purchasing Summary tab is a new page that has been added to the Work Order application. Here we see the location of all purchase lines from purchase requisitions and purchase orders that are related the given work order. Allowing the user the opportunity to visualize all of the relevant spending from the work order and access each of the purchase lines.
6	Safety Bulletins	A new application introduced with MaxiCloud Essentials is the Safety Bulletins application. This app has numerous features that are designed to allow the user to create safety bulletins and manage any actions related to said bulletin. It consists of 5 tabs. The first includes of the general information of the bulletin that is similar to that of the service request application. The review tab displays information surrounding safety review of a given location. Preventive measures tab is used to save all the actions related to the safety bulletin. Related records will contain any activities taking place in the location where the safety bulletin is applicable and finally the Log tab which will contain any messages that relevant users have stored to inform future users of any updates regarding the bulletin.
7	Repairs Process	A new application and process for repairing Items and Assets in Maximo.
8	User Profile Delegates	Addition of workflow delegate and date range fields in the user profile dialog.
9	People App Person Group Tab	New tab in People Application to display associated Person Groups
10	Off Boarding Workflow	New workflow on User application to allow User or both User and Person to be deactivated, doing so will also remove any person groups.
11	Copy Person Groups	Ability to copy person groups from one person to another.

12	MaxiCloud GURU	Global Usage Reporting Utility, sends usage data to BPD for License Compliance
13	Job Plan Lock On Use	New flag added to Job Plans to flag as “Lock On Use”, meaning when they are added to a work order, it is not possible to change planned materials, services, tools, labour or tasks.
14	Security Update	All features are now hidden until enabled in security groups, scripts activated or workflows enabled.
15	Planned Material to PR Fields	New script to allow client to specify fields which they would like to copy the value of from Planned Materials to Purchase Requisitions
16	SharePoint Adapter	New solution to allow Direct Print of Attached Files residing on SharePoint. It is delivered using Maximo configuration and Automation Scripts, and does not require any java code or customization.