# MaxiCloud Essentials Functional Overview



# **Product Development**

REV	ISSUE OR REVISION DESCRIPTION	ORIG BY	DATE	CHKD BY	DATE	APPD BY	DATE
2.0	Updates and additional functionality	Paul Irving Shaw Kevin St-Claire Leon Mills Pedro Paraiso	09/02/2023				
1.0	Initial draft	Paul Irving Shaw Kevin St-Claire	29/10/2021				



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# Scope

This document describes the key changes applied to the base Maximo system for BPD Zenith's MaxiCloud Essentials. This document is not a user guide, it will explain at a nontechnical level how the system has been modified to optimize it for both end users and Maximo Administrators. For all changes, described at a technical level, refer to the MaxiCloud Essentials As Built document.





# **Components / Features**

# 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.

# Installation

MaxiCloud Essentials is packed with features, however these features install dormant. This simply means to use any features they must first be activated. This can be done using the MaxiCloud Essentials Installation Guide as reference.



# **Drag and Drop Attachments**

MaxiCloud Essentials introduces the Drag and Drop Attachments feature. Drag and Drop Attachments use the base functionality of attachments in Maximo but improves upon the ease at which they can be added. 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.

	MAXADMIN 🤘	
ımmary	Service Address Map Gallery	
	Select a Folder Attachments 🗸	
	Drop files here!	
	BPD → Move	
	Attachments	Ø
1		

#### How to Add to Screen

This drop zone is a new control that can be added in Application Designer onto any application that can use Attachments and is automatically added to standard applications in Maximo when MaxiCloud Essentials is installed.



→ Å á	+ 🗈 🕏 🗲 🖆 ک	- 🖻 🖬
	Controls	×
🗉 I	Labels:  Show O Hide	1222x5
	Appbar Attachments Blank Line ar	₩ PD Drag d Drop
	ab>cd State Breadcrumbs Group Checkbox Co	mbobox
	Data Source Value Help Grid Hy	🔧 iperLink

#### How to Use

To use, simply open your file explorer and select a file of your choosing and then you can drag the file from the explorer and place it onto the grey area. This will then upload the file to the attachments, you will know when the file is uploaded successfully when the box turns green (as shown below) for 5 seconds, before returning to grey. There is also a dropdown menu that can be used to specify which doclink folder the attachment will be placed.

← List View Work Order	Plans Assignments	Related Records	Actuals	Safety Plan	Log	Failure Reporting	Specifications	Purchasing Summary	Service Address	Map Gallery	y
Work Order: 1006	Oil Change						Site: KS	ITE	Select a Folder Attachments V	Uploaded!	
Location:	>						Class: WC	RKORDER		ore Files Here!	
Asset:	>						Work Type:	Q			
Configuration Item:	>					=	GL Account:	Q		Attachme	<u>ents</u> 6



# Limitations

If the file is not supported a pop-up message will show informing the user that the file is not accepted and requesting the user to attempt again.

An error may also occur if the file is too large, or if there are required fields on the application which have not been populated, just as this would happen if a user were to try and upload a file using the standard attachments functionality.

Note: When dragging your file, you must be in the files real directory, this does not work when dragging from "Recent Items" in Windows Explorer.



# **Gallery Tab**

The Gallery Tab is new tab that is utilised as a visual hub for image, text and pdf attachments associated with a given Maximo record. This tab is automatically added to standard applications in Maximo when MaxiCloud Essentials is installed but a user's security group needs to have it enabled to be able to see and use it.

← List V	iew Work Order	Attachments	Plans	Assignments	Related Records	Actuals	Safety Plan	Log	Failure Re	porti
Inspecti	on Result									
Work Orde	er: 1116	Issue PC				=	Site: BEDFORD		Status:	WAF
Gallery	▼ <u>Filter</u> > ○	· · · · ·		🗲 6 - 6 of	6 🔿				4	e.
	Document		Cr	eated By	Create	ed Date 🗕				
~	1050		MA	XADMIN	28/09	/20 14:24				
Image:	Microsoft Word - N	laximo JSON API_	CRUD.do	c 10 /	/ 14		¢	Ŧ	ē Î	
	Bulk	Processing								
		Using the x-m to process mu array []. The e collection url (	ethod-ov ltiple res example Bulk pro	verride header w sources provided below shows 3 cessing only su	ultiple resources ir ith a value of BUL d in the message b assets being creat pported using colle	K, directs ody within ed using t	the processing a JSON			
		http://loc	alhostinor	t/maximo/oslc/os/m	iyasset					

# Limitations

There are currently some limitations to the functionality of the gallery tab:

- Does not support .docx files.
- Is not currently compatible with Secure Doclinks.
- A Core bug in Maximo 7.6.1.3 causes issue when navigating between attachments in the gallery.



# **Query Manager**

Maximo allows users to create queries in applications, that can be used on Start Centre Portlets. These queries can only be edited by the owner of the query, there is no central application to manage all the queries and there is no way to clearly see where a query is being used.

The Query Manager application solves this issue, it's a new application that centrally manages queries, clearly shows which start centre portlets the query is used on and allows Maximo Administrators to change the query clause by unlocking the record.

👌 🗮 Query Manager	Mike Wilson 🖾 🔟 🞱	e> ⑦ IBM
Query Y Find Owner	Select Action V 😌 🖸 🔎	$\leftrightarrow$ $\rightarrow$
← List View Main		
Query Name SUPERVISORTEAM	Application PERSON	
Description Supervisor Team Contact Information	Owner MAXADMIN	
Clause (supervisor in (select personid from person where personid=:USER) or personid in (select supervisor from person where personid=:USER) ) and personid NOT IN (:USER) and status in (select value from synonymdomain where domainid='PERSONSTATUS' and maxvalue='ACTIVE	Public? Default?	Unlock



<b>△</b> ≡ ♀	)ue	ry Manager			Mike	Wilson	,	$\square$	.11	0	₽	?	IBM
Query	1	Find Owner	0	~	Select Ac	tion	~	Ð	2	Ç	÷	<b>&gt;</b>	
← List View	Mai	in											
Query Name SUPERVISORTEAM						Applicat PERSON							
• Description Supervisor Team Cor	ntact	t Information	-			Owner MAXADM	1IN						
Clause						Public?							
(supervisor in (select personid in (select se personid NOT IN (:U)	ct pe super ISER)	rsonid from person where p rvisor from person where pe ) and status in (select value f	ersonid=: sonid=:L rom	:USER) o JSER) ) a	nd	$\checkmark$							
synonymdomain who maxvalue='ACTIVE')	ere g	domainid='PERSONSTATUS'	and			Default?							
,	·												
					//							Ur	lock



# **Workflow Admin App Enhancements**

The Workflow Admin application has introduced several new filterable columns into the application. 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 Maximo records.

#### Original fields

Processes 🕅 <u>Filte</u>	[ → <b>d</b> 8 ↑ ↓	$\Leftrightarrow$ 1 - 1 of 1 $\Rightarrow$				
Process Activa	ation # Description	Owner Table	Owner Description	WF ID Originator	Start Time	
						<u> </u>
PRA	1 Purchase Requisitions	PR	Site EMEA, PR 1073	52 ADMINASS	11/12/21 2:47 PM	
Added fields						
Audeu nelus						
		20.11				
Invoice No.	PR No.	PO No.	Work Order No.	Company No.		
					_	
	1073				1	
					1 A 2	



# **Person Group App Enhancements**

In the Person Groups application, MaxiCloud Essentials allows users to be auto sequenced when added to the group. Without this, administrators are required to know the next value in the sequence, which could mean searching through lots of records. This feature makes it so that the sequence number will be the next available value for the group.

← List View Pe	erson Group Ga	llery								
• Person Group: 1	.002	Clearance one				Crew Wor	rk Group? 🗌	Drop files here!		
									Attachment	<u>ts</u> Ø
People 🔻 <u>Filt</u>	ter > 0, 78	↑ ↓ ← 1 - 3	lof1 →						坐	×
Person	Nam	e		Use for Organiza	tion Use for Site	Grou	p Default? Site	Default? Organization Defa	ault? Sequence*	
✓ LEON	> Leon	Mills		BPD	Q,	् 🔽			1	Ē
Details										
+ Pers	son: LEON	> Leon Mills			=	(	Group Default?	Calendar:	Q,	
Use for Organizat	tion: BPD	0,					Site Default?	Shift:		
Use for S	Site:	0,				Organiz	zation Default?	+ Sequence:	1	



# **Work Order Purchasing Summary Tab**

The Purchasing Summary tab is a new tab that has been added to the Work Order Tracking 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 visualise all of the relevant spending from the work order and access each of the purchase lines using built in links. This view could be particularly helpful for those that don't have access to the purchasing module.

← List View	Work Or	der P	ians Gallery	Assignments	Related Records Actuals	Hanitest	Safety Plan	Log Fellure	Reporting	Specifications	Service Add	iress Details	Purchasing Sur	mm
Nork Order: 1	W08367	×	trispection of As	set		<b>a</b> 3	ite: SITE1			Status;	WMATL			
PR Lines	₩ Ellber	4		• = 1	- 3 of 3 🔅						ىڭ			
PR*		Line*	Туре	Item	Description			Need By Date	Status	Qua	ntity Order Ur	sit		
6611		1	RENTAL	R1017	Ovilli Bit 2/3"			33/10/18	CLOSE		1.00 EA			
6612		5	STDSERVICE	R51001	Drill Rental			11/10/18	CLOSE		1.00			
6674	*	1	ITEM	1007	COUPLING STRAIGHT 3	1/4-		11/10/18	CLOSE		1.00 EA			
PO Lines	v titel	1.11		• 1	- 3 of 3								4	
P0+		Line*	Туре	Item	Description		Nee	d By Date Ven	dor Date	Status	Quantity	Quantity Receive	d Order Unit	
1145	- 5 -	1	RENTAL	R1017	Dell Bit 2/3"		11/1	0/18		WAPPR	1.00		EA	
1146	5	1	STOSERVICE	R51001	Dritt Rental		11/1	0/18		WAPPR	1.00			
1207	5	. 2	ITEM	1007	COUPLING STRAIGHT 3/4"		11/1	0/18		WAPPR	1.00		EA	



# **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.

List View Safety Bulletin Beviews Preventive			
ervice Request: 5007 Owner:	Owner Group:	Status: NEW	Digfilmined
			aladootta g
Dress Information			
ler Information			
Reported By: LEON 🔅 >		Affected Person: LEON ()	
Anne: Leon Mills		Name: Loon Mills	
Phone: 07912157422		Phone: 07912157422	
E mait isomilis@outlook.com		E mail: konmilis@outlook.com	
rvice Request Details			
Summary: EnultyFire.Alarm		Casaffration	,
Cenals: 0 (1)+ (1) (0 (1 ) 1 (1) (1) Ref	- + + + + + + + + + + + + + + + + + + +	Cass Description	9
Provident is not responsive, reach to be fixed		Reported Priority: 1 9	
		Internal Priority: 3 Q	



# Repairs

It is often more cost effective and economical for items and assets to be sent for repair instead of replaced.

MaxiCloud Essentials includes a solution to assist in the management of the repairs process within Maximo, or where applicable flagging the asset to be beyond economical repair. This solution primarily uses workflows, automation, and a new application to assist the user in the creation of repair work orders and inventory usage records.



# **Repairs Application**

The new application is essentially a heavily modified version of the work order tracking application. All of the fields unnecessary for the repairs process have been removed and the layout has been modified to streamline the process and make the application very simple to understand. When creating a new repair in the repairs application, the system is essentially creating a work order and automatically setting the work type for that work order to REP.

# Work Order Tab

The main Repairs "Work Order" tab has limited options and is where assets can be added that need to be repaired. The assets section shows standard expected information but also displays the asset's original location and Current location. This is to help visually track the assets to have a clear picture of where they are logistically.



☆ ≡	Repairs																						
Query	~	Find Wo	ork Orde	r	0,	~	Select A	Action	~	•	• •	÷	÷	8	0	60	· ~	0	<b>S S</b>		*		
🗲 List Vi	ew Work Or	der P	lans	Actuals	Repair	rs Sum	mary	Related	l Record	s Lo	g												
Wo	rk Order 1004	ļ		rotating	( asset										Site	CARLI	SLE		<u>Atta</u>	chment	§ Ø		
1	ocation		>											(	Class	WORK	ORDER		W	ork Type	e REP		0
Class	ification							>						GL Acc	ount			0		Statu	s COM	P	
Class Des	cription							0					F	ailure (	Class			>	Sta	itus Date	e 11/0	3/22 11:2	7
													Pro	oblem	Code			O,					
Assets	<b>7</b> <u>Filter</u>	> 0,				- 1	- 1 of	1 >												₩.	×		
	Asset		Origina	l Location	n Currer	nt Loca	tion Des	scription							Site			Sta	atus				
>	ROT_ASSET	<u>i</u> >	UK		REPVE	ND	Rot	ating Ite	m						CARL	ISLE	Q	AC	TIVE		Ē		
Sele	ct 🗸 🛛 Clea	ar All	New	Row																			

# Plans Tab

The plans tab in the Repairs application has been entirely stripped back and the materials and services tabs have been split into their own sections for clear visibility if several items are on the same repair work order. The materials are added just ass they are as standard in Maximo 7.6.1. Service lines are created automatically on save and display service lines for repair assets as well as repair items. However, assets and items can not be on the same repair work order, but services for either will be displayed in this section.



<b>△</b> ≡	Repairs																				
Query	✓ Find	d Work Ord	der	0	✓ Select	Action	~ (		Ç	← -	*	2	0	<b>~</b> (	0 0		D	2			
← List View	Work Order	Plans	Actuals	Repairs	Summary	Related Re	ecords	Log													
Work Order	1005	ite	m							S	ite CAR	LISLE					Stat	us COMF	Ρ		
Parent WO		>																			
Materials																					
Materials	Filter	> 0 <sub>6</sub>	73 1	N - V	÷ 1 -	1 of 1 $\rightarrow$														<u>ب</u>	<b>Z</b>
	Task Ite	m	D	escription						Qu	antity	U	nit Cost		Line	Cost	Storer	oom		Direct Issue?	ł
>	O, NO	RMAL_ITE	⊡ <b>&gt;</b> N	Iormal item	ı						1.00		0.00			0.00	STORE	ROOM	>		Ē
Select	Materials	Select As	set Spare P	Parts	New Row																
Services																					
Services	▼ <u>Filter</u>	> 0,			<b>← 1</b> - :	of 1 $\rightarrow$										⊻	¥				
	Task Ser	vice	D	escription						Qu	antity	U	nit Cost		Line	Cost					
>	0,		> R	EPAIR: No	rmal item						1.00		0.00			0.00	Ē				
Select	Standard Servi	ces	New Row																		

# Repair Summary Tab

The Repairs Summary tab on the Repairs application shows a history of the movement for the item. It includes all associated repair bins and inventory usage lines for the repair work order.

List View	Work Order Plans Actuals Repairs Summary	Related Records	Log								
Line Item											
Vork Order 10	008 Repair item			Site CARLISLE		Status	APPR				
Parent WO											
Repair Bins	$\nabla$ <u>Filter</u> $\rightarrow$ $\bigcirc$ $\nabla$ $\land$ $\checkmark$ $\leftarrow$ 1 -	1 of 1 $\rightarrow$		<u></u>	۲						
Item	Description	Bin	Storeroom	Condition Code Current Ba	lance						
NORMAL_ITE	M > Normal item	RP-1008	STOREROOM		1.00						
nventory Usa	age Records 🛐 <u>Filter</u> > 🔍 🍒 🧄	🕨 🔶 1 - 3 of 3	$\rightarrow$							<u>*</u>	
Jsage	Description	Line Description	ı	From Lo	cation	To Store Room	To Location	Usage Type	Condition Code	Status	
	_ >										
L006	<ul> <li>Repair: Return Item NORMAL_ITEM to Storero</li> <li>Repair 1008</li> </ul>	<sup>om for</sup> Normal item		STORER	оом			RETURN		COMPLE	те
1007	Repair: Issue Item NORMAL_ITEM to Vendor f Repair 1008	or Normal item		STORER	оом		REPVEND	ISSUE		COMPLE	те
1008	<ul> <li>Repair: Return Item NORMAL_ITEM from Venc Repair 1008</li> </ul>	or for Normal item		STORER	оом		REPVEND	RETURN		COMPLE	те



# Actuals Tab

The actuals tab is essentially a standard work order actuals screen. It has been included in the rentals application to track the actuals and keep them separated from the repairs summary tab. This is to prevent too much confusion for standard Maximo users.

▲ Repairs				
Query Y Find Work Order Q V	Select Action 🚽 😌 🧕 🇭 🔶 🗿	2 <b>2 3 7</b> (	9 🛛 🖉 🗈 🔀	
← List View Work Order Plans Actuals Repairs Sun	mary Related Records Log			
Work Order 1005 Item	Site CA	RLISLE	Status COMP	
Children of Work Order 1005 7 Filter >	↑ ↓ ← 0 - 0 of 0 → 실 2			
Tasks for Work Order 1005 77 Filter > 🧠 🎖	$\uparrow  \downarrow  \leftarrow  0  -  0  \text{of}  0  \Rightarrow$	<u>↓</u> <u>∠</u>	_	
Sequence Task Summary	Estimated Duration Statu	S		
New Row	у.			
Labor Materials Services Tools				
Materials 🔻 <u>Filter</u> > 🔍 🔏 🛧 🗸	1 - 4 of 4 →			₩ 💌
Task Item Description	Transaction Typ	e Storeroom	Quantity Bin	
> O NORMAL_ITE() > Normal item	RETURN	O STOREROOM	1.00 RP-1005	<b>,</b>
> O NORMAL_ITE(3 > Normal item	ISSUE ISSUE	O STOREROOM	1.00 RP-1005	् 🛅
> O NORMAL_ITE() > Normal item	E RETURN	O STOREROOM	1.00 RP-1005	
				<b>्</b> 🖻
> O NORMAL_ITE() > Normal item	ISSUE ISSUE	O STOREROOM	1.00 RP-1005	<ul><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li></ul> <li></li>

All in all, the Repairs application is a simple to use, concise version of the work order tracking application specifically tailored for this repairs process.

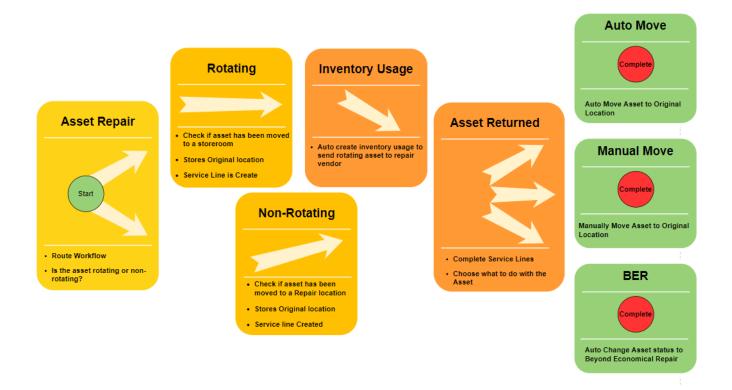
# **Overview of Functionality**

The repairs process begins in the new Repairs application. The process can be looked at as two separate processes, each of which is managed with the repairs application. The difference is whether the repair is for an asset or an



item. A repair asset and a repair item can not be entered into one repair work order, they must be separated. Multiple assets can be entered into an asset repair work order as can multiple items be entered into an item repair work order. If an asset or multiple assets are chosen for repair, the planned material tab becomes deactivated. Conversely, if an item or multiple items are selected for repair, the asset section becomes deactivated. All of the processes are triggered by routing the workflow.

# Asset Repair Process



If an asset is chosen, and the workflow routed, the system will check that the asset has been moved to the appropriate locations before allowing the process to continue. If an asset is non-rotating, it must first be moved to a repair location. If the asset is rotating, it must be moved to a storeroom. Both moves can be accomplished using the Move/Swap/Modify action from withing the repairs application. The application keeps track of the original asset location and also the current location of the asset.

If any rotating assets are selected, the process will automatically create an inventory usage record and autofill the appropriate fields. All the user has to enter is the location field with the repair vendor of choice. The repair work order can be left as INPRG until the item has been returned. Once returned the user can open the repair and route the workflow again. A service line is auto created along with a Purchase Requisition. The purchasing process must be completed and received before continuing. If not, the user will receive a message instructing them to complete the process. This creates a service record in the actuals and allows the process to continue.

There will be 3 options presented:



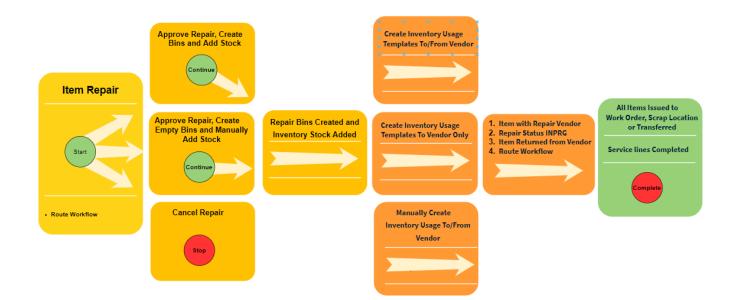
- 1. COMP Auto Move Asset to Original Location
- 2. COMP Manually Move Asset to Original Location
- 3. COMP Auto change asset to Beyond Economical Repair

Option 1, "COMP – Auto Move Asset to Original Location" uses automation to complete the process of moving the asset back to its original location. This is particularly useful if there is a large quantity of assets on the repair work order.

Option 2, "COMP – Manually Move Asset to Original Location" relies on the user manually moving the assets back to their locations using the Move/Swap/Modify action from withing the repairs application, or by doing the same task from within the assets application. Realistically if for any reason the asset is to be moved to a location other than the original one, this option can be used to cover this process.

Option 3, "COMP – Auto change asset to Beyond Economical Repair" can be used when the item has been deemed essentially irreparable or where the cost of repair is not economical. If this option is selected, the status of the asset is changed to BER. The moving of location after this should be manually managed as there could be many possibilities dependent on company policy.

If the asset is non-rotating, the process is essentially identical, but does not include the need for an inventory usage record to be created.



#### **Item Repair Process**

If an item is chosen for repair, as with assets, service lines are automatically created. On routing the workflow, 3 options will be displayed:



- 1. APPR Approve Repair, Create Bins and Add Stock
- 2. APPR Approve Repair, Create Empty Bins and Manually Add Stock
- 3. CAN Cancel Repair

Option 1 "APPR - Approve Repair, Create Bins and Add Stock", will set the status of the repair work order to approved. Repair bins for each item will be auto created in the inventory balances and the quantity of each item will be copied from the planned materials tab. The bin number will also be prefixed with "RP-". This is to help distinguish repair bins from standard bins in the storerooms.

Option 2 "APPR - Approve Repair, Create Empty Bins and Manually Add Stock", will set the status of the repair work order to approved. Repair bins for each item will be auto created in the inventory balances, but the balance must be manually adjusted from the inventory application. The bin number will also be prefixed with "RP-". The workflow will not continue until the balances have been amended.

Option 3 simply route the workflow to cancel and stops the process.

Following on from the first options, 3 more options are available:

- A. Create Inventory Usage Templates To/From Vendor
- B. Create Inventory Usage Templates To Vendor Only
- C. Manually Create Inventory Usage To/From Vendor

Option A, "Create Inventory Usage Templates To/From Vendor", will auto create 3 inventory usage records. The first is a return to storeroom and is automatically completed at the initial stage, showing the movement of the item from its operating location to the storeroom, this only happens if option 1 is chosen. There are 2 further templates created for the sending to and receiving from the repair vendor. These are created for both options 1 and 2. The templates are filled in except for the vendor field, along with any required billing information. These exceptions must be manually entered. Once the item has been to and from the vendor and the inventory usage records marked as complete, the workflow can be routed again.

Option B, "Create Inventory Usage Templates To Vendor Only", will create an inventory usage template to send the to the repair vendor, but does not create the return template like option A does.

Option C, "Manually Create Inventory Usage To/From Vendor", relies on the user completing the inventory usage records manually. The work flow performs checks to make sure the item has been sent to the repair vendor before allowing the process to continue.

At this stage the repair work order can be set to INPRG – Items with Vendor, or APPR – Stop Workflow. This selection is an assignment to be responded to by the relevant user.



Once the item has been returned from the vendor the process can continue. The final option "COMP - All Items Issued to Work Order, Scrap Location or Transferred" is displayed and validation ensured that the final criteria are met before completing the repair work order. COMP - All Items Issued to Work Order, Scrap Location or Transferred. They can be issues to the repairs work order via the actuals tab under materials by clicking Select Reserved Items. Once selected, the bin field is required. Beyond this the final validation is checking that the service lines have been complete and are also displayed in the actuals tab under services. From the Plans tab, the PR number can be found for the service lines. This relies on the Reorder crontask being enabled. This can be used to follow the purchasing and receiving process to completion. Once complete, the repair work order can be routed one final time and the status changes to COMP.





# **User Profile Delegates**

Addition of workflow delegate and date range fields in the user profile dialog.

Default Information			
User: MAXADN	1IN MAXADMIN		
	Default Insert Site: KSITE	Q Ke	v's BPD Site
	Workflow Delegate:	0,	
	Delegate From:	Ħ	
	Delegate To:	Ħ	



# People App Person Group Tab

A new tab in People Application to display associated Person Groups has been added. This makes it incredibly efficient to check which groups a user is in without the need to change between applications.

People				
0,	✓ ● ■ ○ ←	<b>&gt;</b>		
on Item	← List View Person	Work History Gallery Person Groups		
ns 25	⊽ <u>Filter</u> > ्	⊗ ↑ ↓ ← 1 - 3 of 3 →		
	Person Group	Description	Group Default? Organisation	Default? Site Default?
	MCERPCRD	> Repairs Coordinators		
s	MCERPSTR	> Repairs Stores		
in in iges t (+SharePoint)	USERADM New Row	> User Admin		

Should any changes need to be made, the user can navigate with ease to the Person Group Application using the Go To menu. This takes the user directly to the record.

Person Group	Description
MCERPCRD	> Repairs Coordinators
MCERPSTR	> Repairs Stores
USERADM	> User Admin
New Row	O Select Value
	🔗 Go To Person Groups



# **User Offboard**

In industry, it is inevitable that staff members will leave the company for one reason or another or switch roles or departments within the company. MaxiCloud Essentials has a solution to make ease of, and rapidly increase the speed associated with the process of removing or replacing said staff members withing the Maximo environment. This can be especially useful when a Staff Member / User is associated with multiple Job Plans,



Preventive Maintenance, Work Orders or Assignments. The User might also be part of multiple groups and have several different Security Privileges.

Historically, an administrator would need to manually search for records with reference to the user that needs removed or replaced with another user. The User Offboard Solution from BPD Zenith can do most of this automatically by routing the Offboard Workflow in the User Application.

# **User Application**

This Accelerator makes small modifications to the User Application. A new Workflow Option is available for selection and a new field is added which allows a Replacement User to be selected via a lookup.

#### Workflow Selection

The Route Workflow toolbar button will be tied to the Off Boarding workflow, so clicking that will start or continue the process. Using the Common Action Menu to route the workflow will present you with two options if the SELFREG workflow is active in your system, so you must select the BPDOB process before continuing.



31	Start Workflow	
l	(1) There is more than one workflow process available for this application. Please select the on	ie yo
	Process: BPDOB: Offboard - R	
t	SELFREG: Review and approve/reject the self registered user.	
	BPDOB: Offboard - Remove or Replace person in records and make inactive	
l	Previously Started Workflow Processes 😗 Filter > 0. 😪 🧄	J

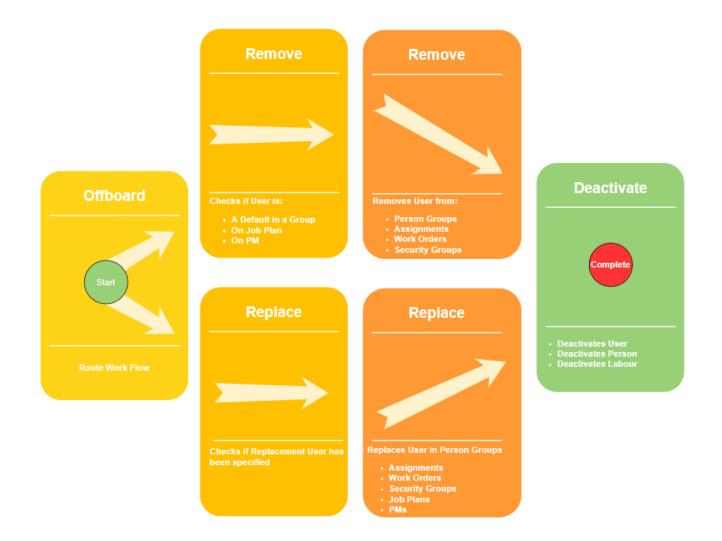
# New Fields on User Application

There is a new field for "Replace User with", this will be used in the workflow if the replace option is selected.

<b>△</b> ≡	Users							MAX	KADMI	[N	$\square$	<u>.u</u>	9	₽	?	IBM
Query	_ ~	Find User		0	~	Select Action	 	~	Ð	2	С С	<b>← →</b>	8	C		2
🗲 List View	User	Groups	Security Profile	e												
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Login Information																
• User Name: KEVIN												Set Pa	ssword			
Personal																
Person:     KEVIN					Dis	olay Name:						Address:				
Status: ACTIVE O	L				Prir	nary Phone:						City:				



# Offboard Workflow



# **Overview of Functionality**

When the Workflow is routed, options are displayed for selection:

- 1. Deactivate User Only
- 2. Remove User from Records and Deactivate
- 3. Replace User with Stated New User
- 4. Cancel

**Option 1** - Simply changes the status of the User to INACTIVE.



**Option 2** - Remove User from Records and Deactivate, has requirements that must be met in order for the process to complete. The new "Replace User with" field must be empty. This is to prevent mistakenly removing a user instead of replacing them. The user must also not be named as a default in any person group, nor can they be associated with a Job Plan or PM. If the aforementioned requirements are not met, they must be manually addressed before continuing. Once addressed, the process can continue and will remove the users from any Work Orders, Assignments, Person Groups and Security Groups. Labour Craft Rates are also removed. The User, Person and Labour records for the User are then all Deactivated.

**Option 3** - Replace User with Stated New User, only has two requirements. The new "Replace User with" field must be populated with an Active User and the User cannot be named as a default in a Person Group. This process will replace the users in any Job Plans, PMs, Work Orders, Assignments, Person Groups and Security Groups with the stated replacement user in the new "Replace User with" field. Labour Craft Rates are also removed. The User, Person and Labour records for the User being offboarded are then all Deactivated. This process does not make new labour records for replacement users.

Option 4 - Stops the workflow without any further changes.

# New Dialog

The addition of a new dialog that shows any records that need to be altered manually is very useful. Using the Go To menu, the administrator can go directly to the record that needs to be altered. This dialog will only ever appear if manual changes are required.



fBoarding	~	-							1 .6			J.	e.
Related Job Plans	V	Filter	> 0,	29	Т	×	1	1 -	I OT	1 7	L.	⊻	×
Job Plan		Descript	ion										
JP1	>	Inspect	Pipes										
Related PM 🛛 🍞	<u>Filter</u>	> °,	76	Ŷ	÷	÷	1 - 3	1 of	1 →	Ł	4	¥.	
PM	D	escriptio	n										
1001	> P	reventive	Inspec	tions									
Related Person Gro	oups	▼ <u>Filt</u>	er >	Q X	5	$\uparrow$	¥	€ :	1 - 2	of 2	2 >	4	
Person Group		Descrip	otion										
MCERPCRD	>	Repairs	Coordi	nators									
MCERPSTR	>	Repairs	Stores										
													ОК



# **Copy Person Group Function**

The copy person groups functionality allows for a user to be given all the same group access as another user. This does not remove existing groups from the user but rather just gives the additional group access.

To utilise this functionality, go to the user application and select the user you wish to copy the groups to.

▲			
Find User Q	<ul> <li>✓ ● □ ♀ </li> <li>→ </li> </ul>		
Find Navigation Item	← List View User Groups Security Profile Token Licenses		
Go To Applications			
Available Queries	User: LEON	Status: ACTIVE	Replace User with:
All Records			
All Bookmarks	Login Information		
All User Types			
Common Actions	+User Name: Leon		
🕀 New User			
Save User	Personal		
Clear Changes			
Change Status	+Person: LEON >	Display Name:	
Create Report			
More Actions	Status: ACTIVE Q	Primary Phone:	
off boarding SO	First Name:	Primary E-mail:	
Workflow			
View History	Last Name:	Workflow Delegate: >	
Copy Person Groups From	Supervisor: >	Memo:	
Database Access			
Set Password Hint	User Settings		
Reset E-Signature Key			

In the more actions section, select the "Copy Person Groups From..." option, this will take you to the following dialog. Here you can select who you wish to copy from. All of their groups that the user is not part of will be listed in the first table, followed by a table that shows all of the user's current groups.



Copy Person Groups From												
	Copy From: TERRANCE Q											
	¥	<u>Filter</u>	<u>&gt;</u> 0,			*	÷ 1	- 2	of 2		<u>ل</u>	<b>e</b>
	Pers	on Grou	p Descrip	otion			Use fo	r Site	U	se for	Organiz	ation
	MCE	RPCRD	Repairs	Coordi	nators							
	USEF	RADM	User Ac	lmin								
	A	<u>Filter</u>	> 0,				÷ 1	- 1	of 1		⊻	<b>K</b>
	Pers	on Grou	p Descrip	otion		Use	e for Site	•	Use fo	r Orga	nization	
	MCE	RPSTR	Repairs	Stores								Ē
					Co	py Per	rson Gro	ups	Sa	ve	Cance	ł

Then select the "Copy Person Groups" option to copy them over and select save. The user will now have access to all the person groups that they originally had and that the user they copied from had.

Copy Person Groups From										
		Сор	y From	TERRA	NCE	_ O,				
	▼ <u>Filter</u>	> °,			¥	÷ 1 - 2	2 of 2	2 >	<u>ж</u>	
	Person Group	Descrip	tion			Use for Sit	е	Use for	Organiz	ation
	MCERPCRD	Repairs	Coordi	nators						
	USERADM	User Ad	min							
	▼ <u>Filter</u>	> 0,			¥	← 1 - 3	3 of	3 →	<u>*</u>	
	Person Group	Descrip	tion		Us	e for Site	Use	for Orga	anizatior	n
	USERADM	User Ad	min							Ē
	MCERPCRD	Repairs	Coordi	nators						Ē
	MCERPSTR	Repairs	Stores							Ē
				Co	py Per	son Groups	5	Save	Cance	el
							_			



# GURU

# Explained

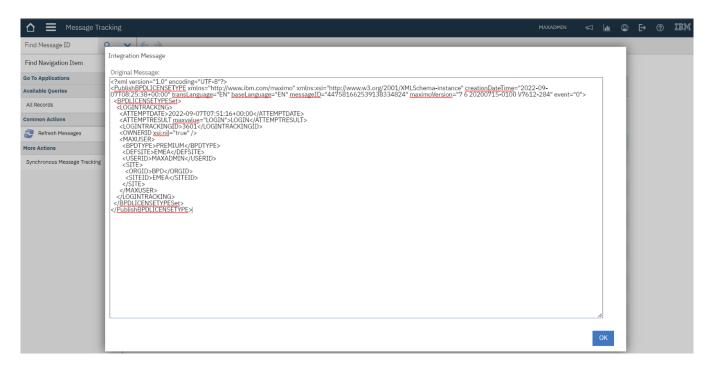
The BPD global usage reporting utility or BPD GURU, was created to help administrator to track the amount of MAS Points used by the users in the system. Also, to provide the users with a category that will be carried to MAS 8.

This happens because of the scripts created that records and tracks the login attempts by the users, and by checking the security groups and what apps they are allowed to use and see.

A Cron task will run the scripts every day at the end of the day and create a message that will contain all logins and logouts, it will also say the Type of license that user is, in the new created field BPDTYPE that as a range of values Limited, Self Service, Base and Premium

# What can the user expect to see?

The user will be able to see a message on the message tracking application everyday that will a bit like the following image.





# Usage

Reporting on this will be internal to BPD and may be shared with IBM, however this will not include any User ID details or identifiable data. User IDs will be stored in the database which is accessible by a select few BPD staff. The Client can request to know who was logged in at the peak usage time to better understand their usage.

# Decommissioning Token Server

BPD Zenith are decommissioning their Token Server and replacing it with an alternative end point called Global Usage Reporting Utility (GURU). To report into this new service, login tracking data should be sent from the Maximo system to the GURU end point on a regular basis, along with details of the user type to allow the determination of usage.



# Lock on Use

# New Flag

A new flag has been added to Job Plans called "Lock On Use". This feature is used to lock down the plans section of any work orders.

👌 🗮 Job Plans		maxadmin 🖾 🔟 🞱 🗗 🕐 IBM
Find Job Plan	✓ ◎ □ ○ < → □	
Find Navigation Item	← List View Job Plan Work Assets Specifications Gallery	
Go To Applications Available Queries	• Job Plan: OILCHANGE Oil Change III BPD O KSITE O	Select a Folder Attachments 🗸
All Records All Bookmarks	Revision: 0	Drop files here!
Common Actions           • New Job Plan	Lock on Use?	Attachments
<ul> <li>Save Job Plan</li> <li>Clear Changes</li> </ul>	Details a Responsibility	•
Direct Print (+SharePoint)     Change Status     Create Report	Status: Default WO Class: Supervisor: DRAFT	Work Group:
More Actions		Owner:
View Status History  View Costs	Duration: Interruptible? Lead:     C:00     C:0     C:0	Owner Group:
Attachment Library/Folders	Classification: Interruptible shift:	Crew Work Group:
Delete Job Plan Add to Bookmarks	Launch Entry Name: Suspend Flow Control?	
Run Reports Cognos Analytics	Include Tasks in Schedule? Flow Action:	

# Usage

When the "Lock On Use" flag is ticked and the job plan is activated, it is not possible to change or delete planned materials, services, tools, labor or tasks in the Work Order Plans tab of any work orders associated to this job plan. There are many situations where this feature is beneficial as making changes after a job plan becomes active can cause conflicting records and user confusion.



🟠 🗮 Work Order Trackin	g			MAXADMIN	$\overline{\Delta}$	Lan (	© E	€ ?	IBM
Find Work Order	✓ ◎ □ 0 ← → □ 0 0 0								
Find Navigation Item	Sequence Record Record Class Summary	Location	Asset	Status					^
Go To Applications	3								
Available Queries	There are no rows to display.								
All Records									
All Bookmarks									
All Work Orders	Select Assets Select Locations Select Work Orders New Row								
Common Actions									
New Work Order	Tasks for Work Order 1004 $\forall$ Filter $>$ $\bigcirc$ $\bigtriangledown$ $\land$ $\checkmark$ $\checkmark$ $\checkmark$ $\checkmark$ 1 - 1 of 1 $\rightarrow$							4	
Save Work Order	Sequence* Task* Summary	Estimated Duration	Status	Owner	c	)wner G	roup		
Clear Changes									
Direct Print (+SharePoint)	> 10 Change the Oil	0:00	WAPPR		<b>&gt;</b>			>	}
Change Status	New Row								- 1
Select Owner									
* More Actions	Labor Materials Services Tools								
Apply SLAs	Materials 🔻 Filter > 🔍 😵 🛧 🔶 🔶 1 - 1 of 1 🔿							4	
View SLAs	Task Item Description	Quantity	Unit Cost	Line Cos	+ Stor	aroom		Direc	t Issue?
Select/Deselect SLAs								Direc	
Change Work Order Options	> O ITEM 1 (1) > Item 1 - standard item	1.00	0.00	0.00	ONS	HORE1	>		
Create »	Select Materials Select Asset Spare Parts New Row								
View									
Ψ									

# How it Works

The feature utilises an automation script to check if the flag has been ticked and the job plan is active. If so, the fields in the plan section of the work order are set as read only and the delete buttons are hidden.

The only way to change this field would be to make a revision of the job plan, and then the materials could be changed and tasks added.



# **SharePoint Adapter**

When implementing Maximo 7.6.1.2 and SharePoint Online, one of the issues identified is that the direct print from Maximo is not supported for attached documents residing on SharePoint. IBM are aware of this incompatibility and have acknowledged that there is no current solution. IBM have also advised that it is not currently listed on the future enhancement register.

# Solution

BPDs solution is delivered using Maximo configuration and Automation Scripts, and does not require any java code or customization, and will accommodate the following two requirements:

- Direct print attached files for a unique record (e.g. work order).
- Direct print attached files for a list of records (i.e from the list tab).

#### Prerequisites

The minimum version of Maximo that is supported for this feature is 7.6.1.2, an alternative version does exist for Maximo 7.6.0.9. This is because the Automation Script functionality used in this release does not exist in 7.6.0.9.

SharePoint Online must be visible to the Maximo Server.

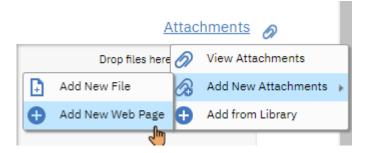
SharePoint Administrator permissions will be required to grant the correct permissions to the Maximo product.

#### How to use this feature

• Navigate to the record you wish to attach a printable SharePoint object to.



• Click on the Attachments Paperclip > Add New Attachments > Add New Webpage



- Select your folder, paste in the URL of the SharePoint document, and set a name and description as you would for any URL Attachment.
- Tick the box labelled "Print latest copy from SharePoint?"
- Click OK.
- Use the new Common Action "Direct Print (+SharePoint)" to add any printable sharepoint documents to the printed attachments for the standard Direct Print report.

Common Actions							
	Report	í					
8	Direct Print (+SharePoint)	6					
•	New Work Order	2					

This common action also appears on the list tab

Security must be granted to run these common actions, just like any other application action within Maximo.

You can also check/uncheck the "Print Latest copy from SharePoint" box from the Attachment Properties dialog for specific attachments



Attachment Properties							
Created in Folder:	Attachments						
Description:	Attachments						
Print latest copy from SharePoint?							
Print attached document with report if printable type?							
Version:							
Path:	https://bpdzenithltd.sharepoint.com/BPDUK/PD/Shar						
Description:	Tank						
Created By:	WILSON						
Created Date:	04/07/22 11:38						
Where Used 🏾 🌹 <u>Filter</u> > 🧠 📆 🛧	↓ ← 1 - 1 of 1 → 🛃 🖪						
Application	ID Document Folder						
WORKORDER	222 Attachments						
	ОК						