MaxiCloud Essentials Functional Overview

BPD ZENITH

Product Development

REV	ISSUE OR REVISION DESCRIPTION	ORIG BY	DATE	CHKD BY	DATE	APPD BY	DATE
1.0	Initial draft	Paul Irving Shaw Kevin St-Claire	29/10/2021				
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BPD ZENITH

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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 non-technical 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.

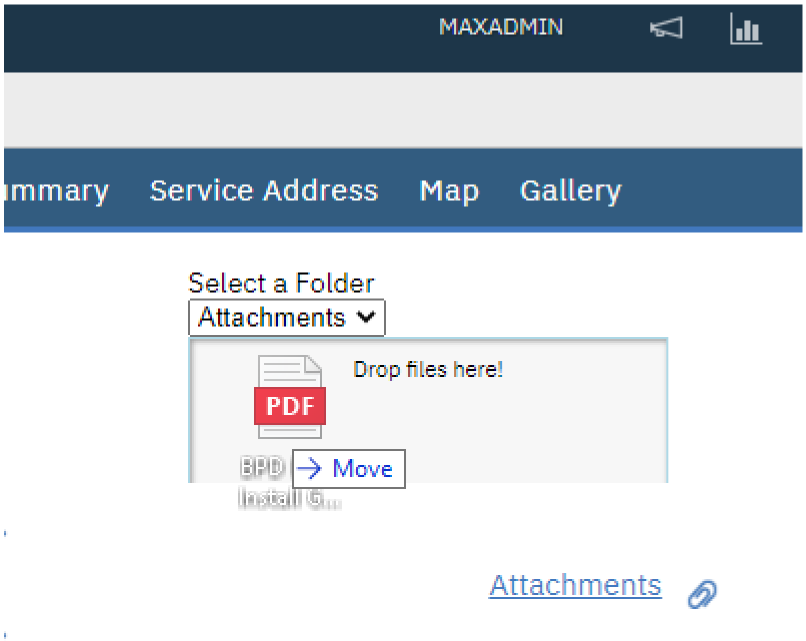
With MaxiCloud Essentials installed, users and system administrators will experience benefits when using their Maximo system, making their use of the product more efficient and enjoyable.

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.

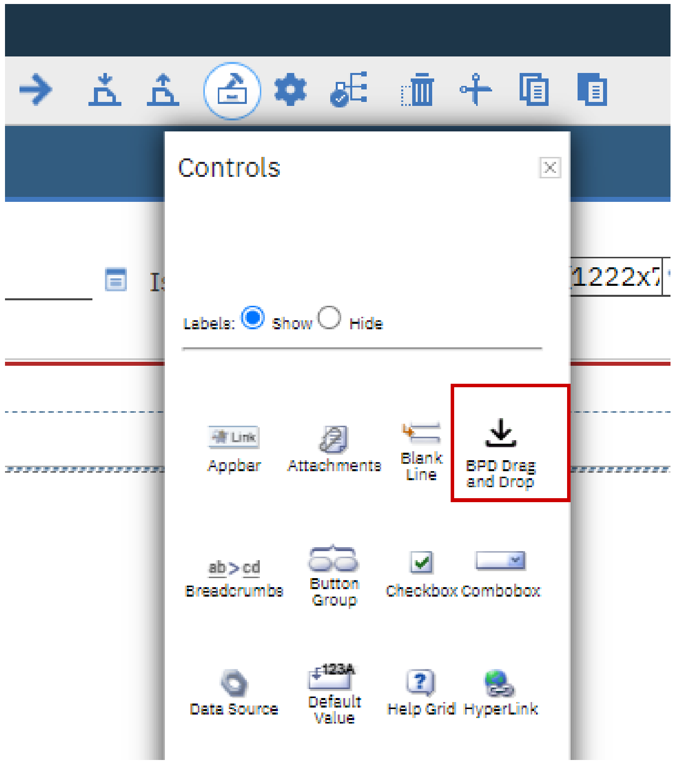
Drag and Drop Attachments

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.



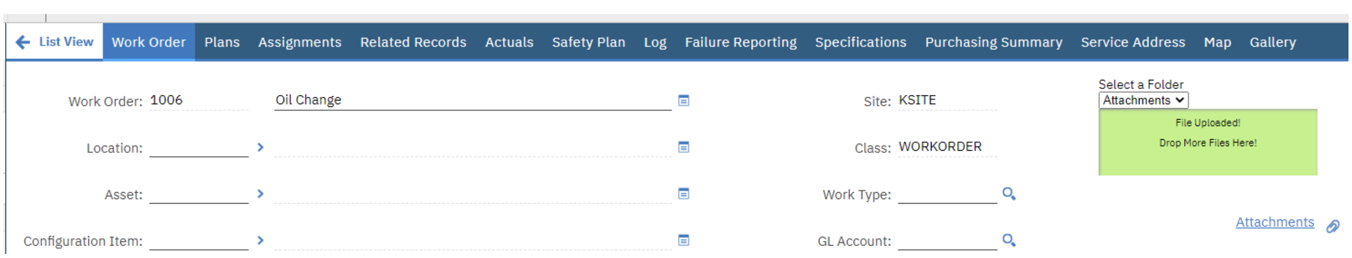
How to Add to Screen

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.



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.



Limitations

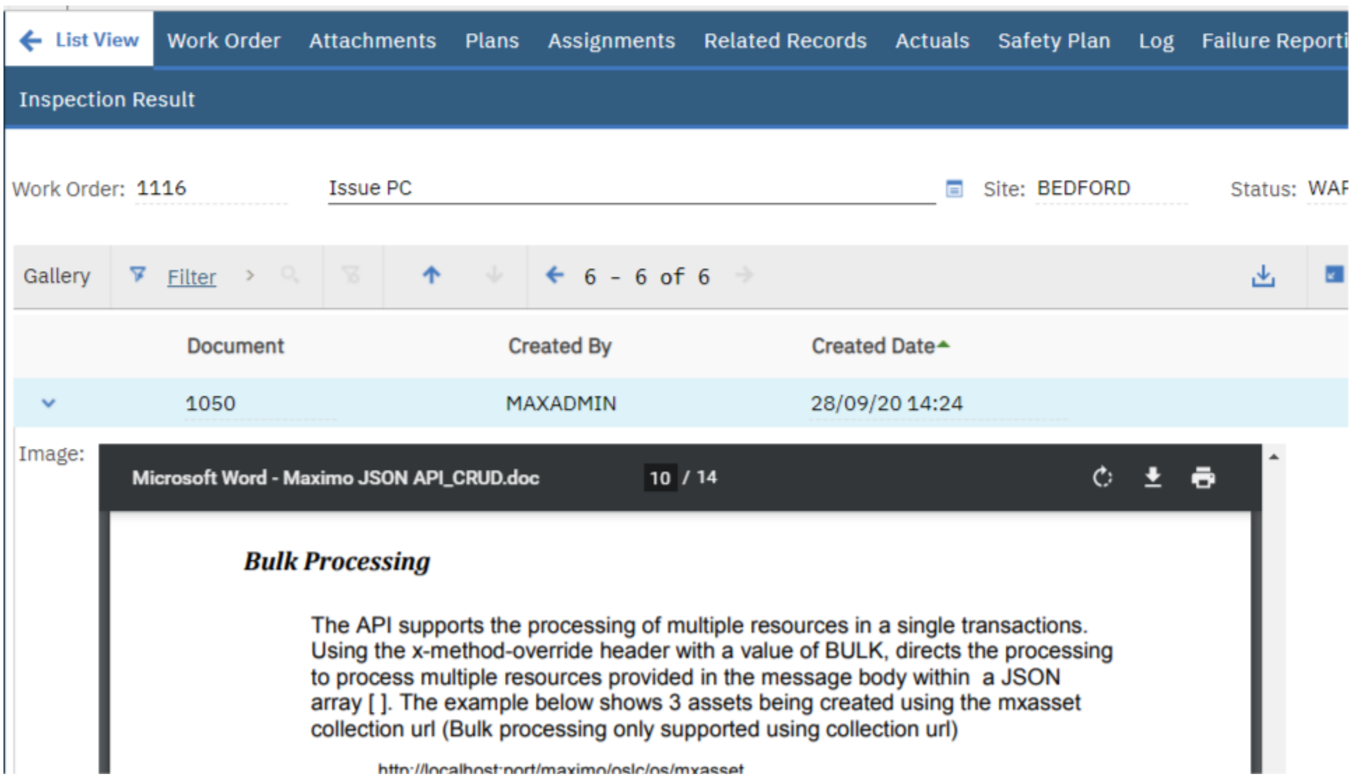
If the file is not supported a pop-up message will show informing the user that the file is not accepted and requesting the user to attempt again.

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.



Limitations

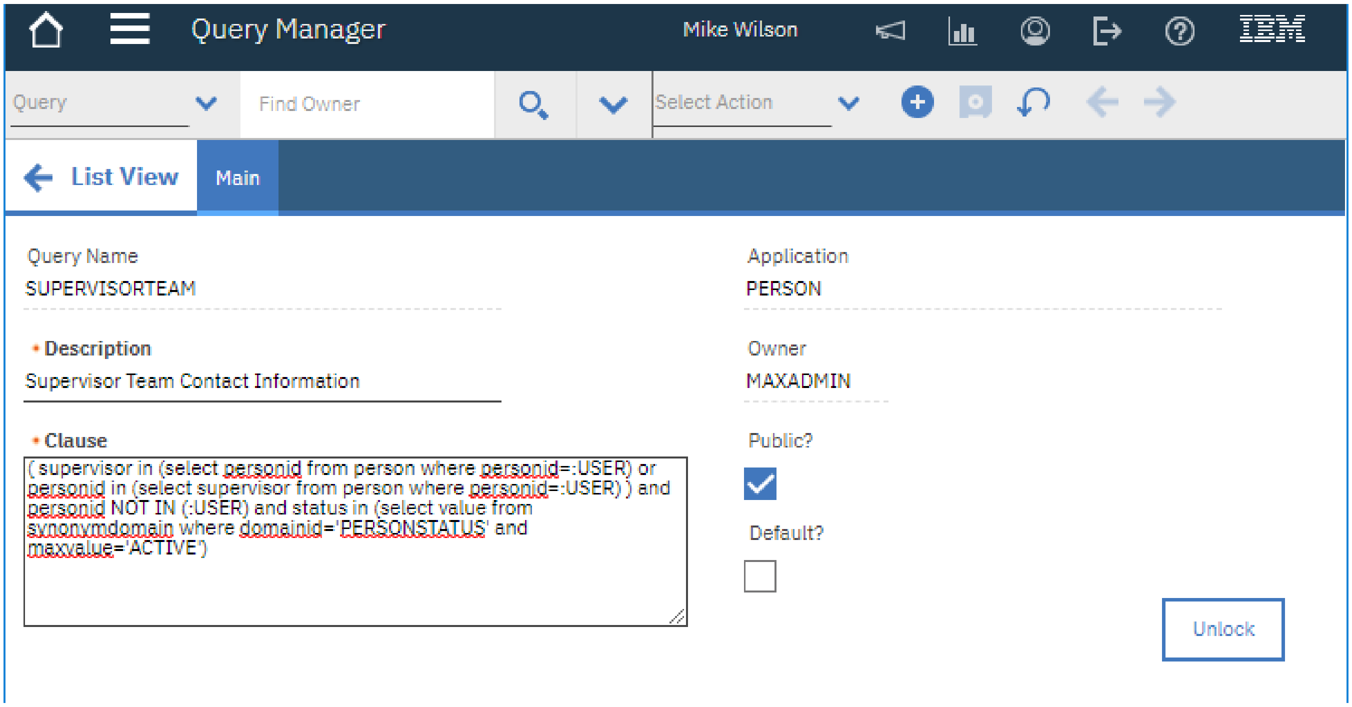
There are currently some limitations to the functionality of the gallery tab:

- 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
IBM
Query
Find Owner
Select Action
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

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   Filter   1 - 1 of 1

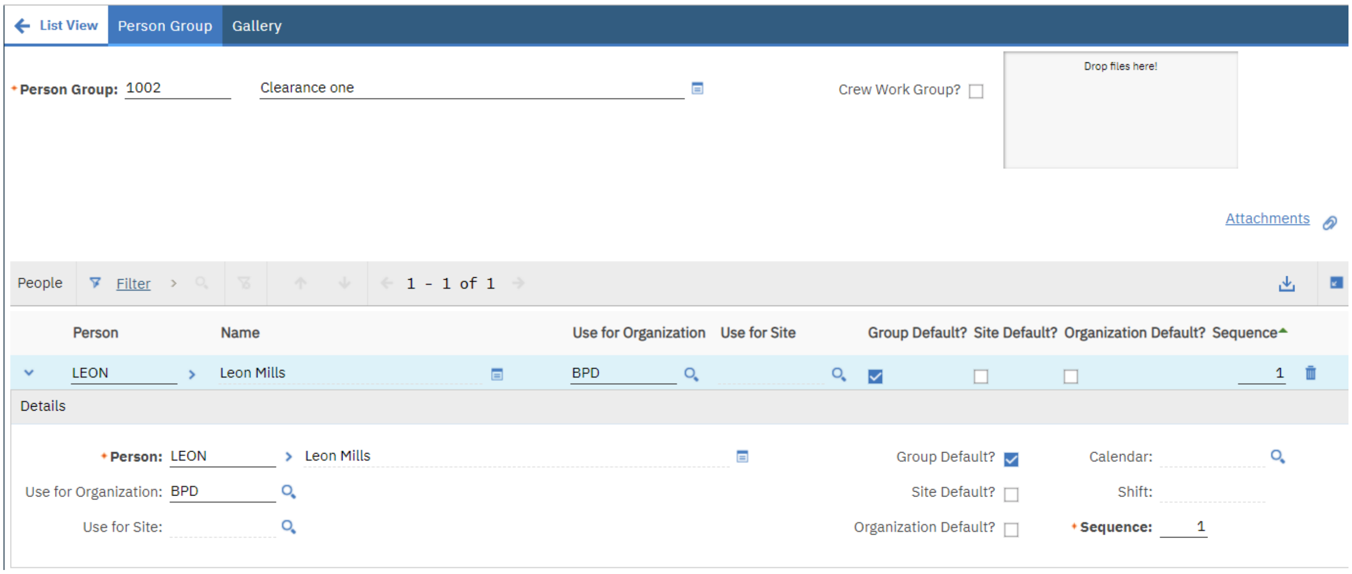
Process	Activation #	Description	Owner Table	Owner Description	WF ID	Originator	Start Time
PRA	1	Purchase Requisitions	PR	Site EMEA, PR 1073	52	ADMINASS	11/12/21 2:47 PM

Added fields

Invoice No.	PR No.	PO No.	Work Order No.	Company No.
	1073			

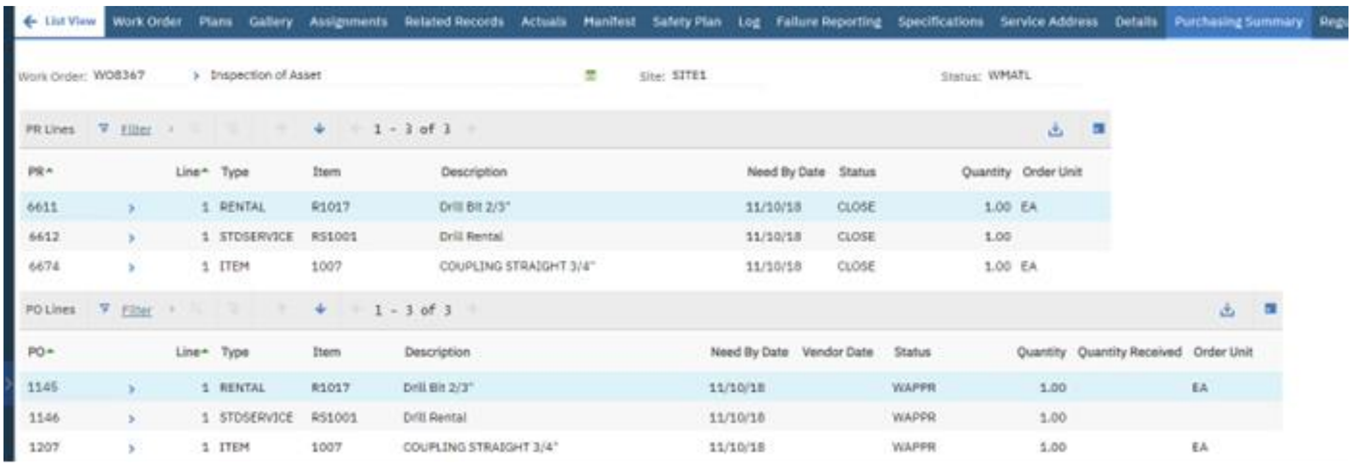
Person Group App Enhancements

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.



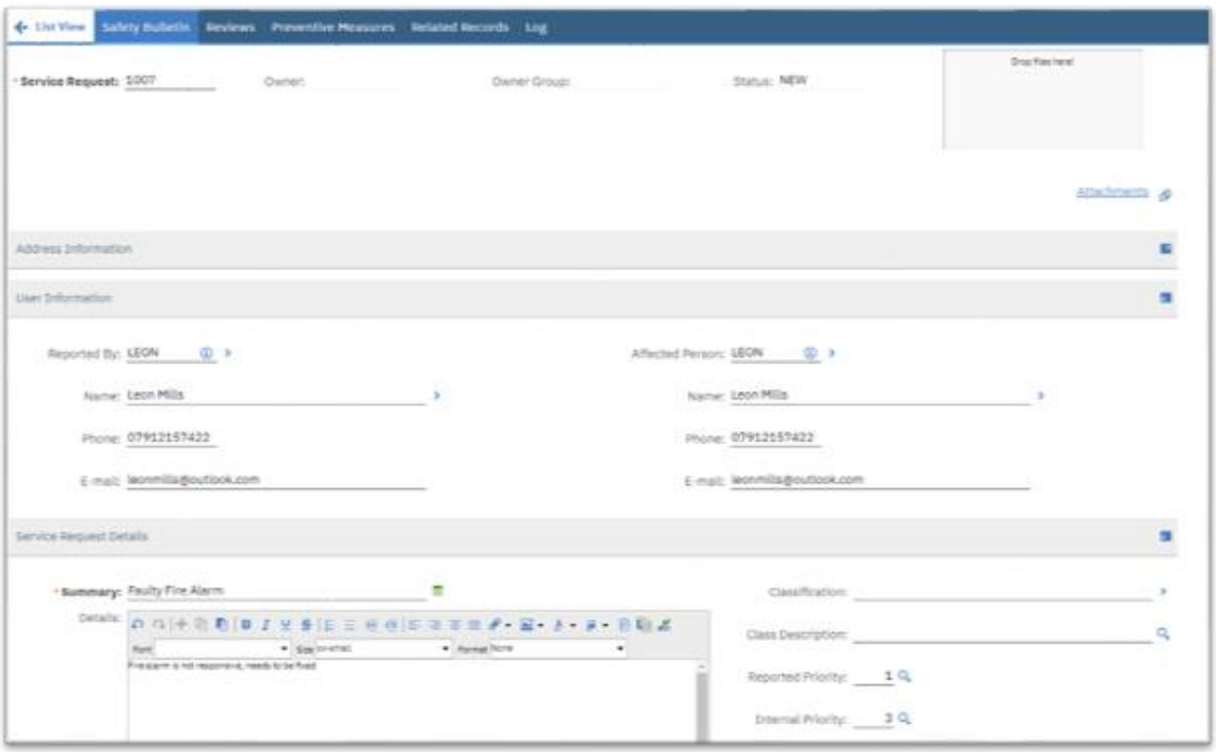
Work Order Purchasing Summary Tab

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.



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.



Repairs

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

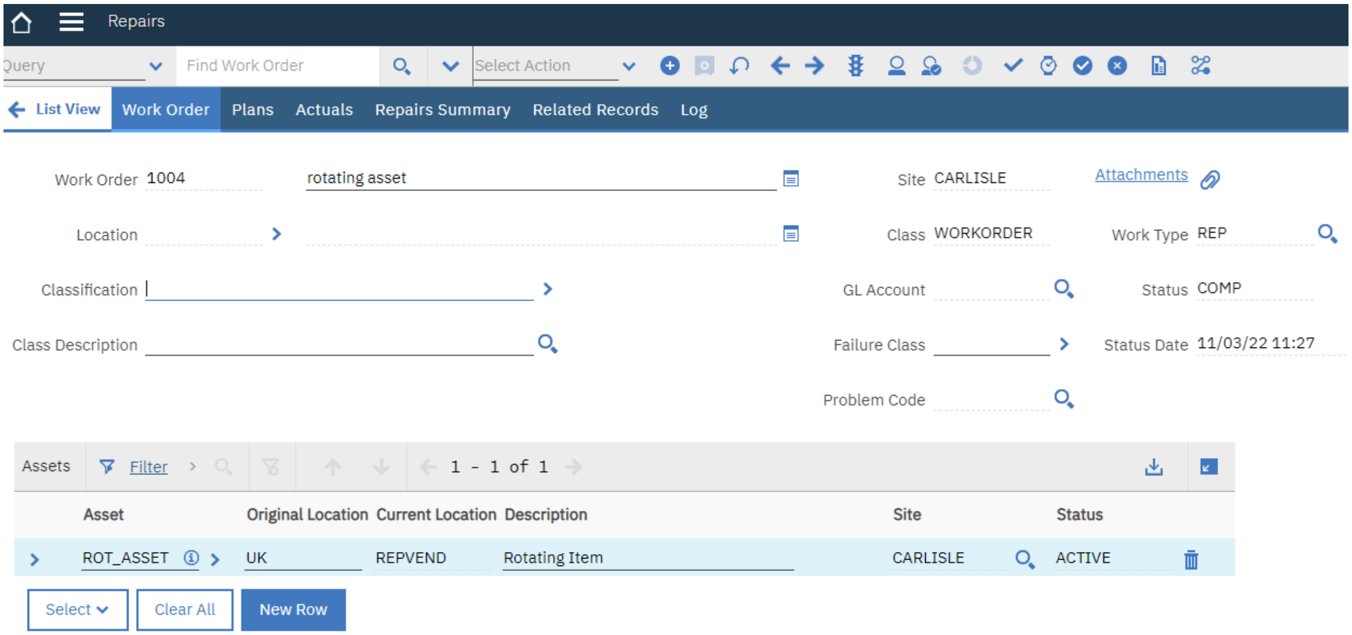
MaxiCloud Essentials includes a solution to assist in the management of the repairs process within Maximo, or where applicable flagging the asset to be beyond economical repair. This solution primarily uses workflows, automation, and a new application to assist the user in the creation of repair work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

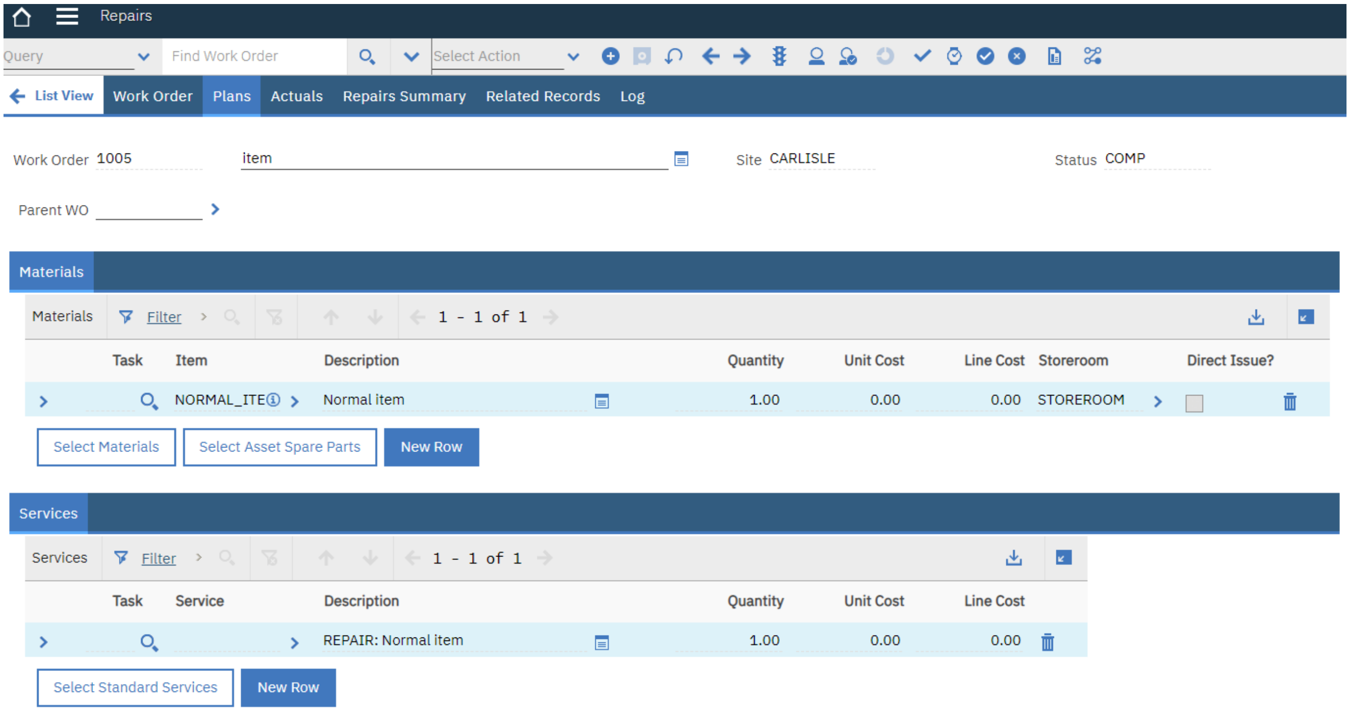
Work Order Tab

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.



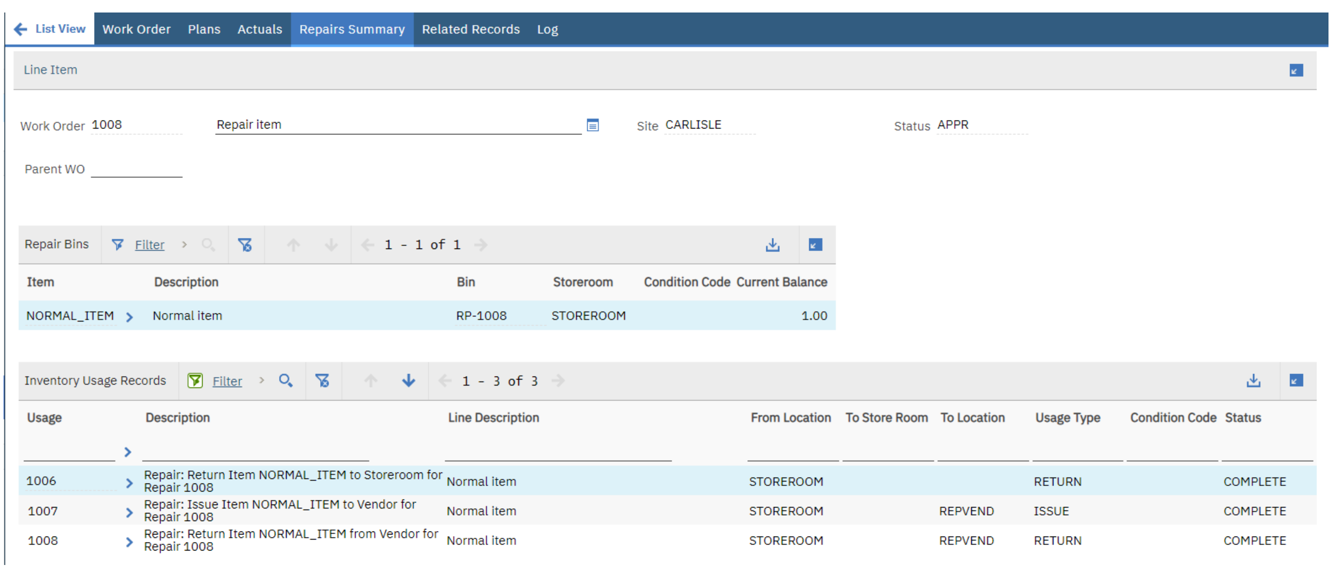
Plans Tab

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.



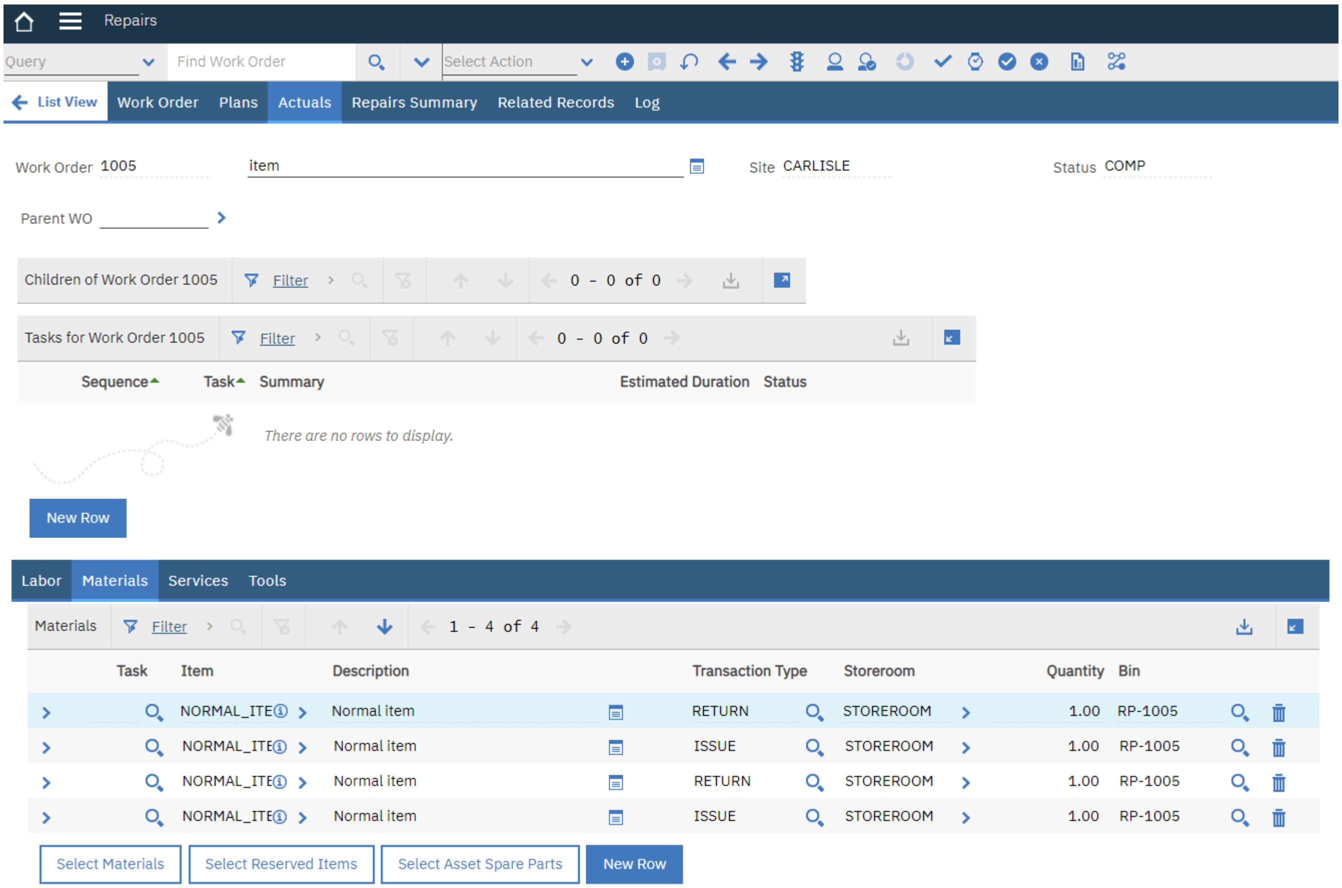
Repair Summary Tab

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.



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.

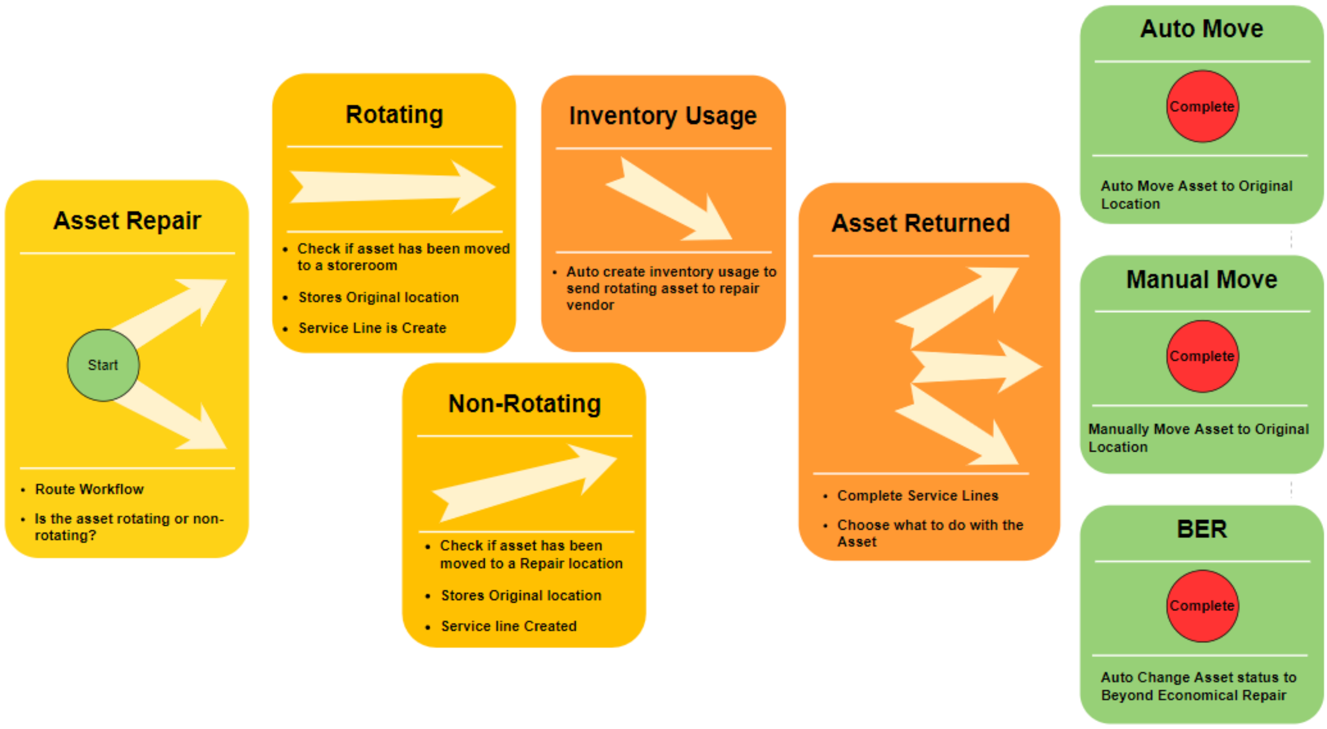


All in all, the Repairs application is a simple to use, concise version of the work order tracking application specifically tailored for this repairs process.

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

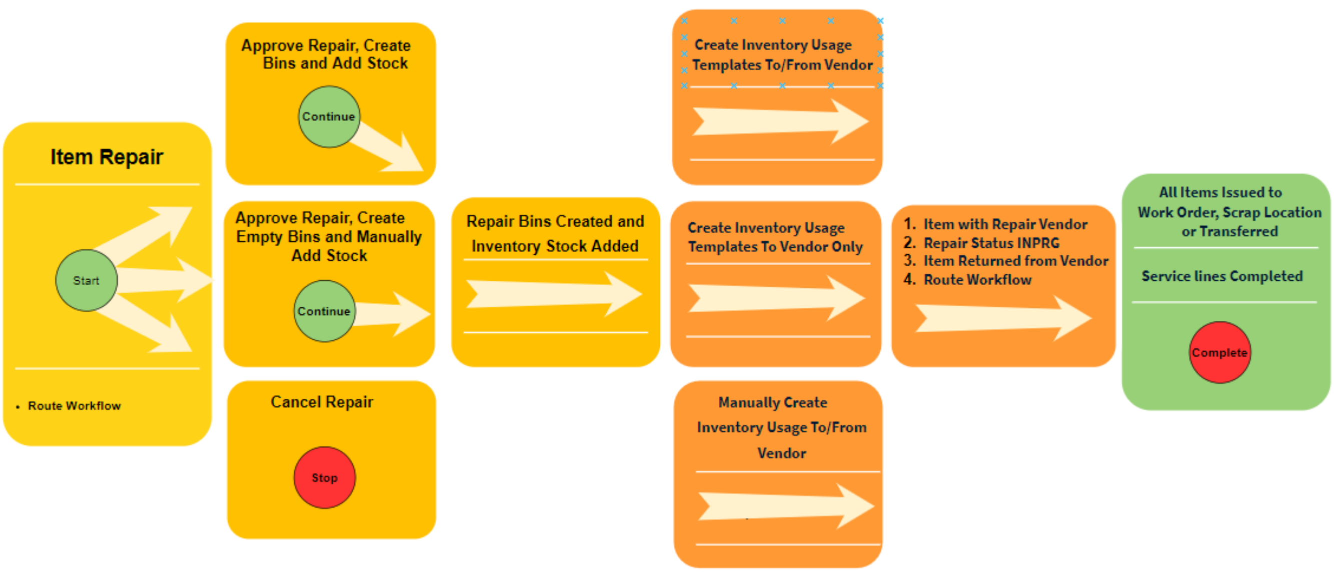
Option 1, "COMP – Auto Move Asset to Original Location" uses automation to complete the process of moving the asset back to its original location. This is particularly useful if there is a large quantity of assets on the repair work order.

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.

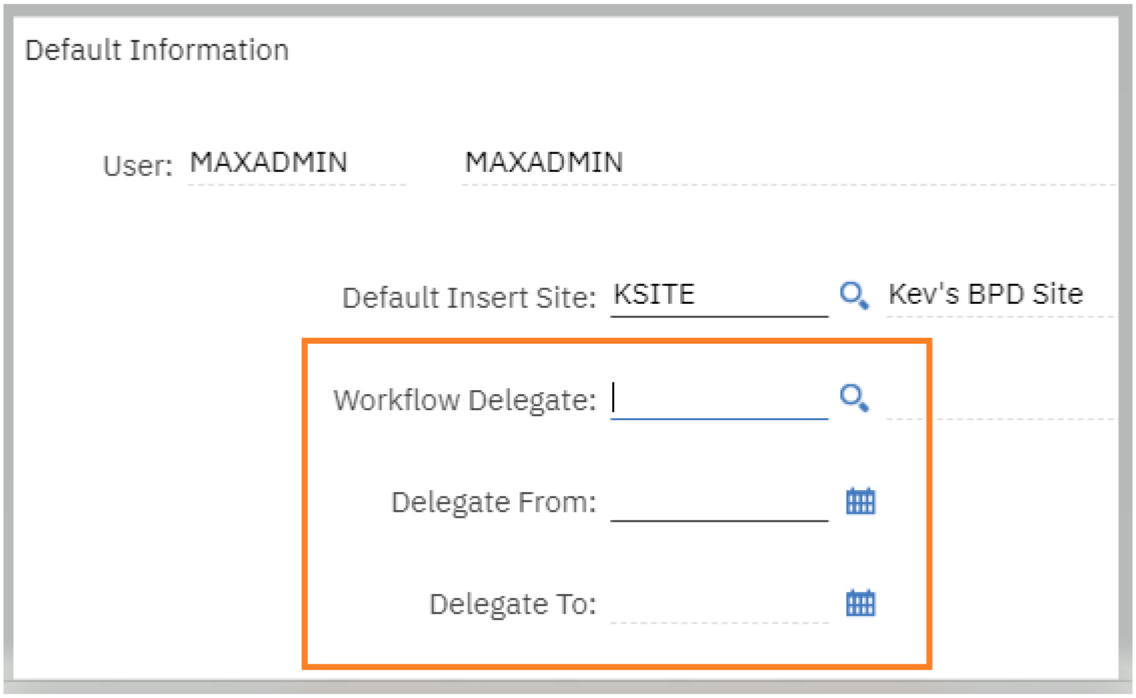
Option C, “Manually Create Inventory Usage To/From Vendor”, relies on the user completing the inventory usage records manually. The work flow performs checks to make sure the item has been sent to the repair vendor before allowing the process to continue.

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.

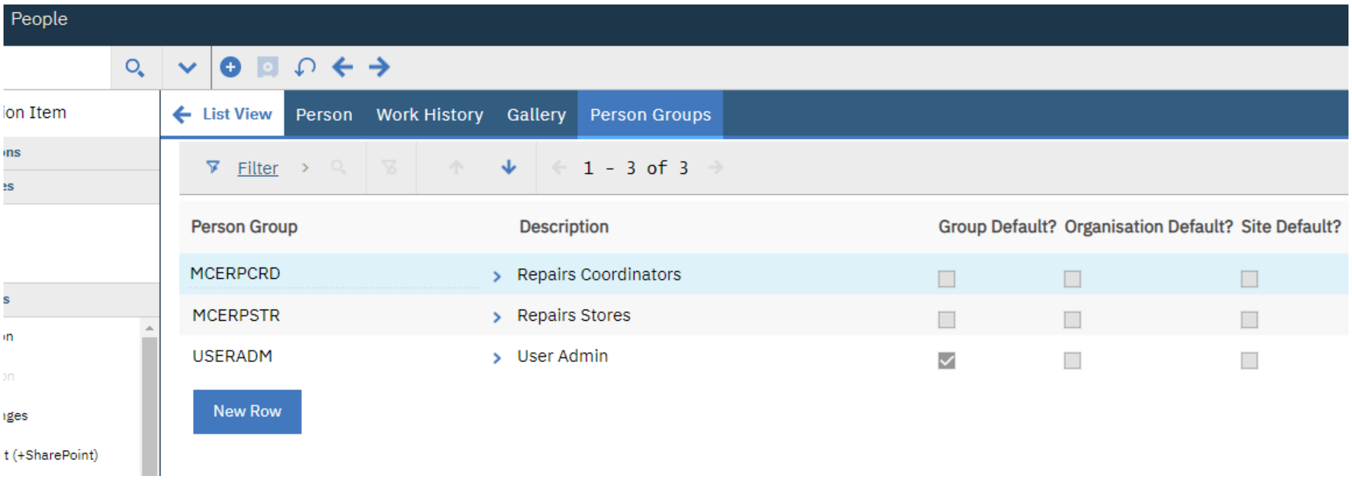
User Profile Delegates

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

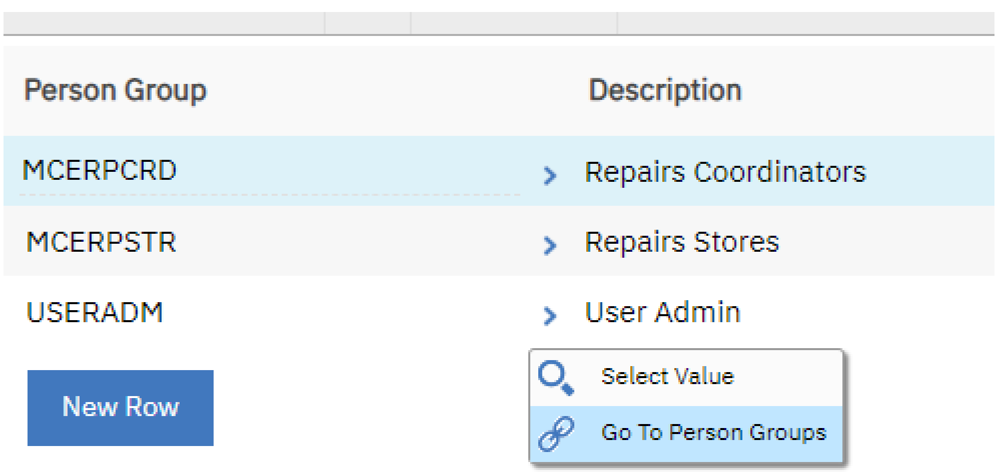


People App Person Group Tab

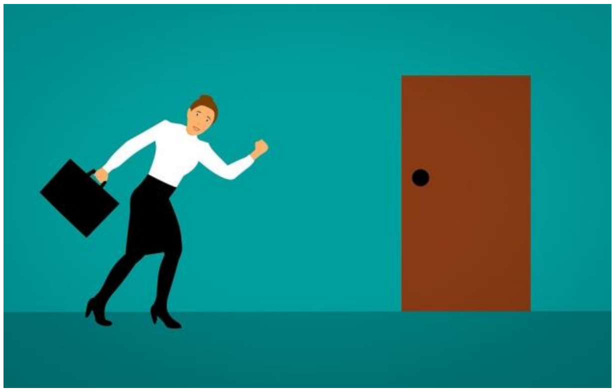
A new tab in People Application to display associated Person Groups has been added. This makes it incredibly efficient to check which groups a user is in without the need to change between applications.



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.



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.

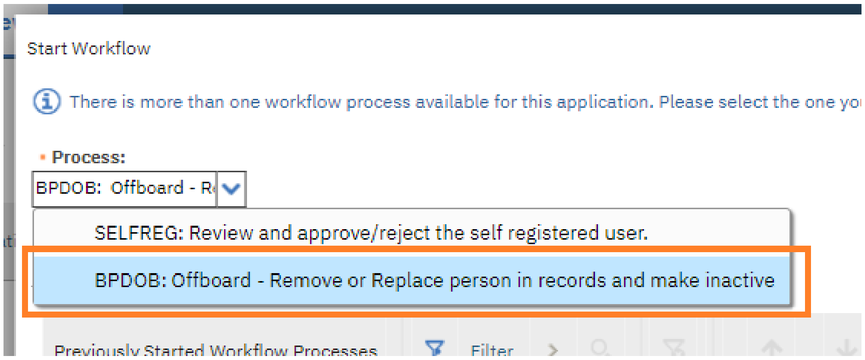
Historically, an administrator would need to manually search for records with reference to the user that needs removed or replaced with another user. The User Offboard Solution from BPD Zenith can do most of this automatically by routing the Offboard Workflow in the User Application.

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.

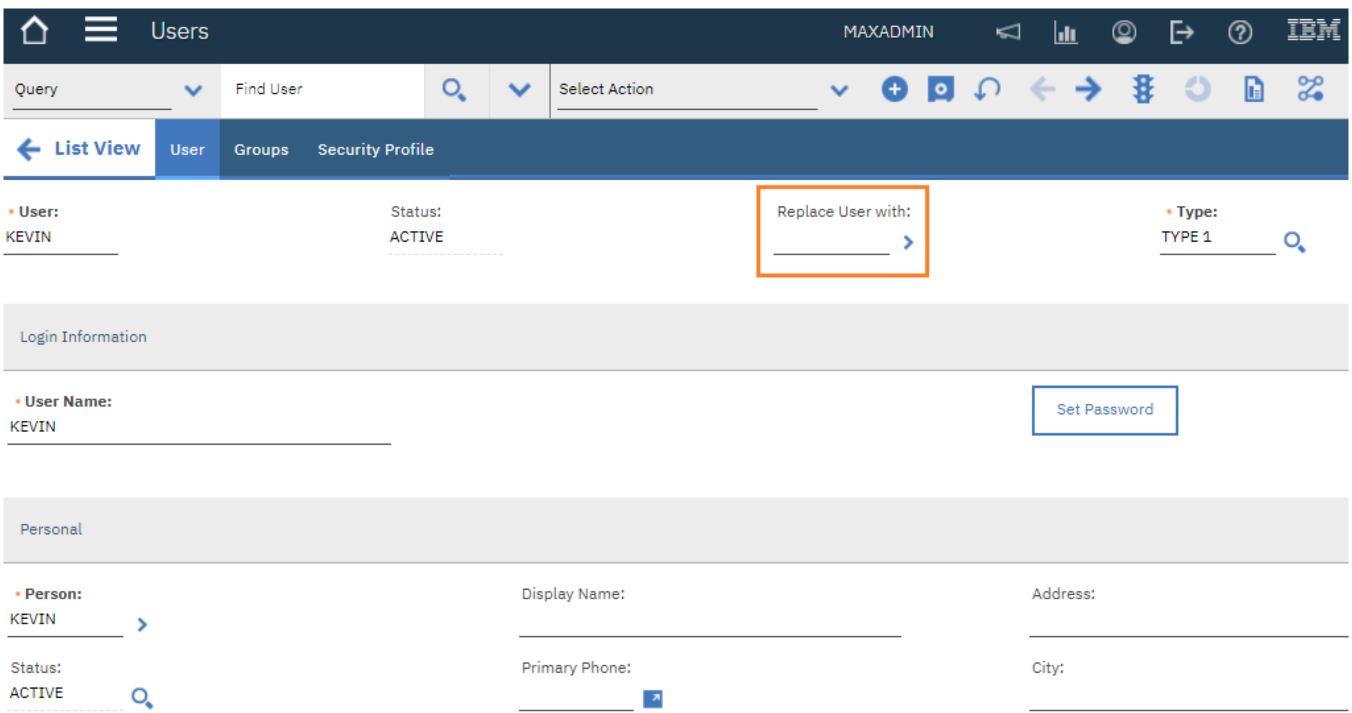
Workflow Selection

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.

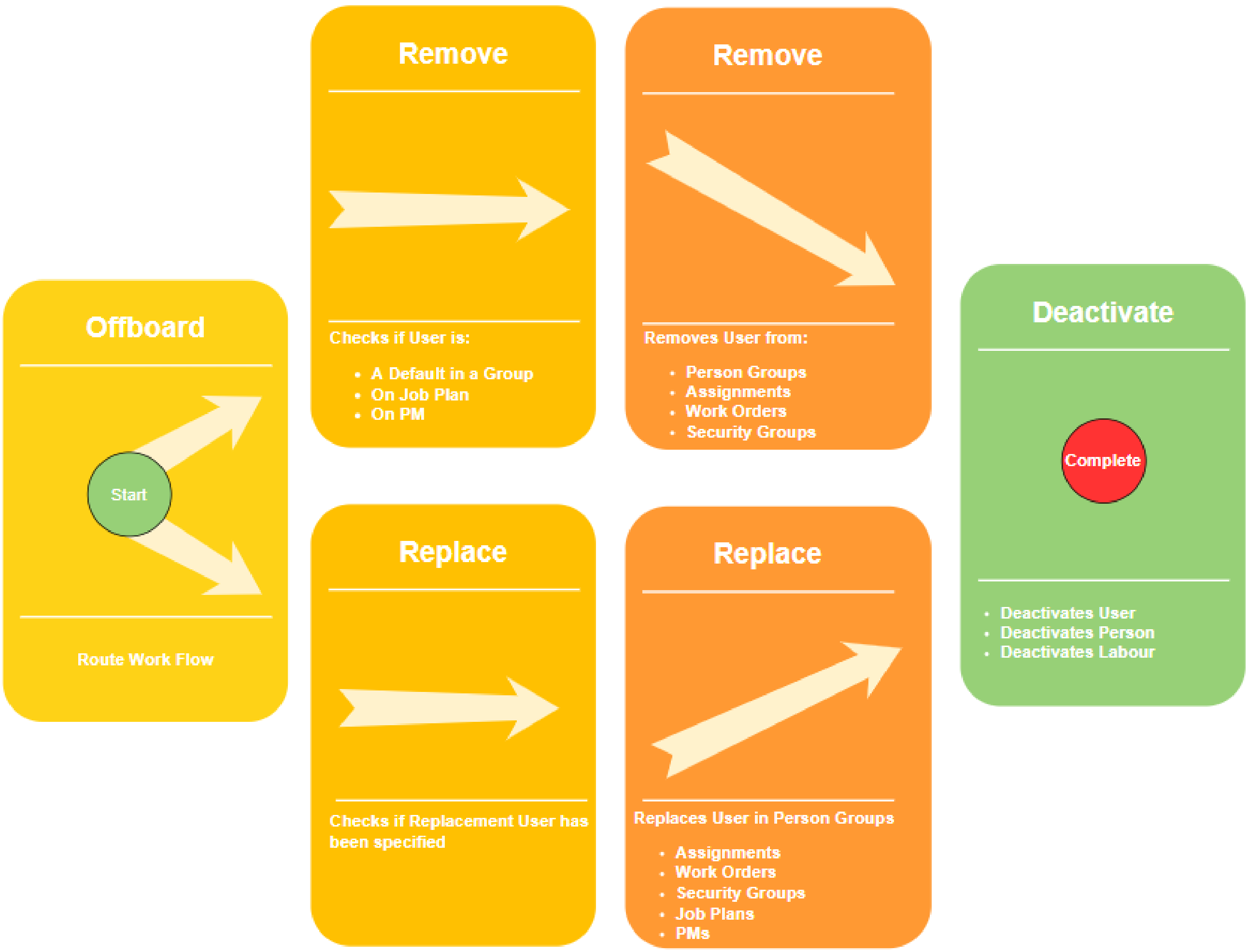


New Fields on User Application

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



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.

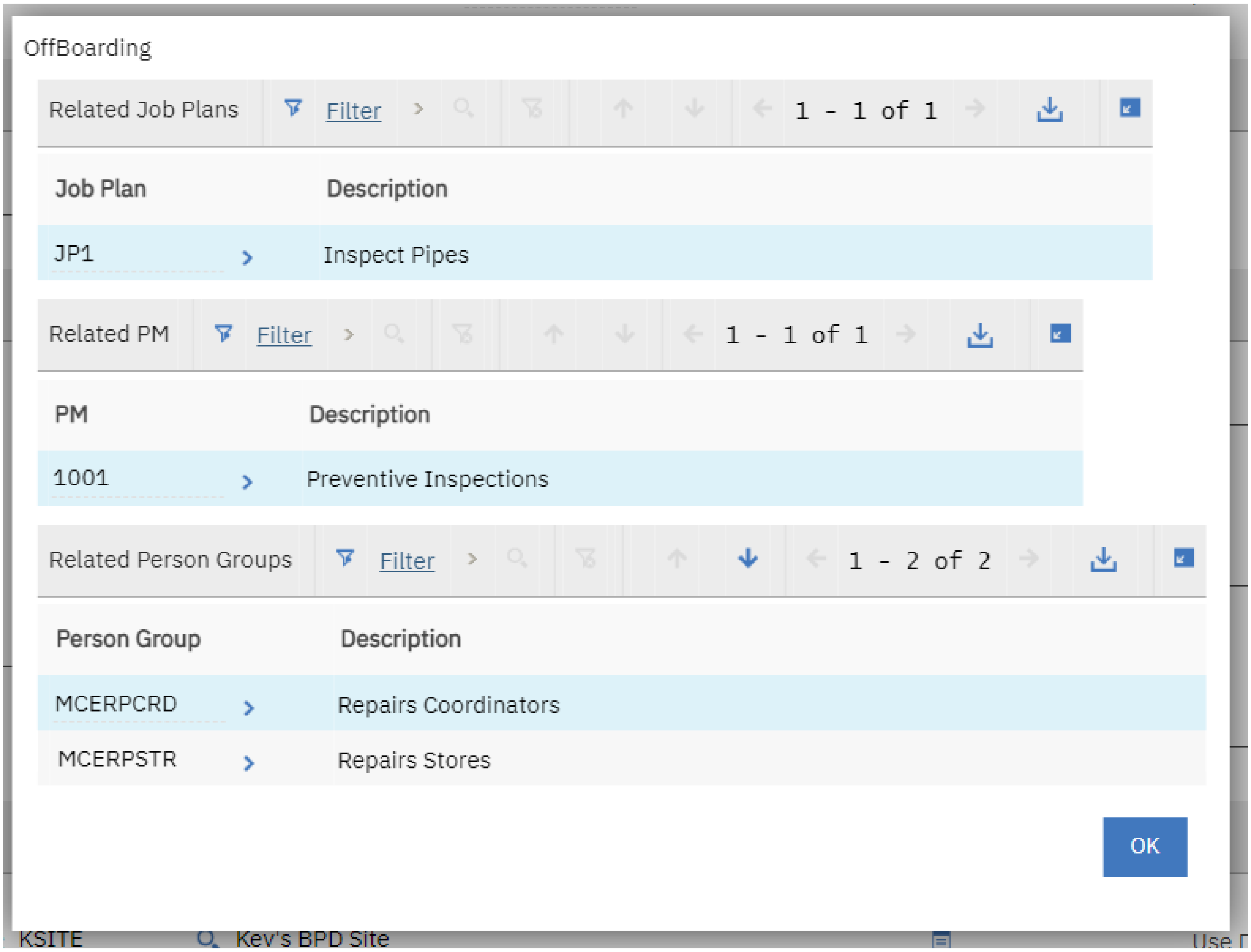
Option 2 - Remove User from Records and Deactivate, has requirements that must be met in order for the process to complete. The new “Replace User with” field must be empty. This is to prevent mistakenly removing a user instead of replacing them. The user must also not be named as a default in any person 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

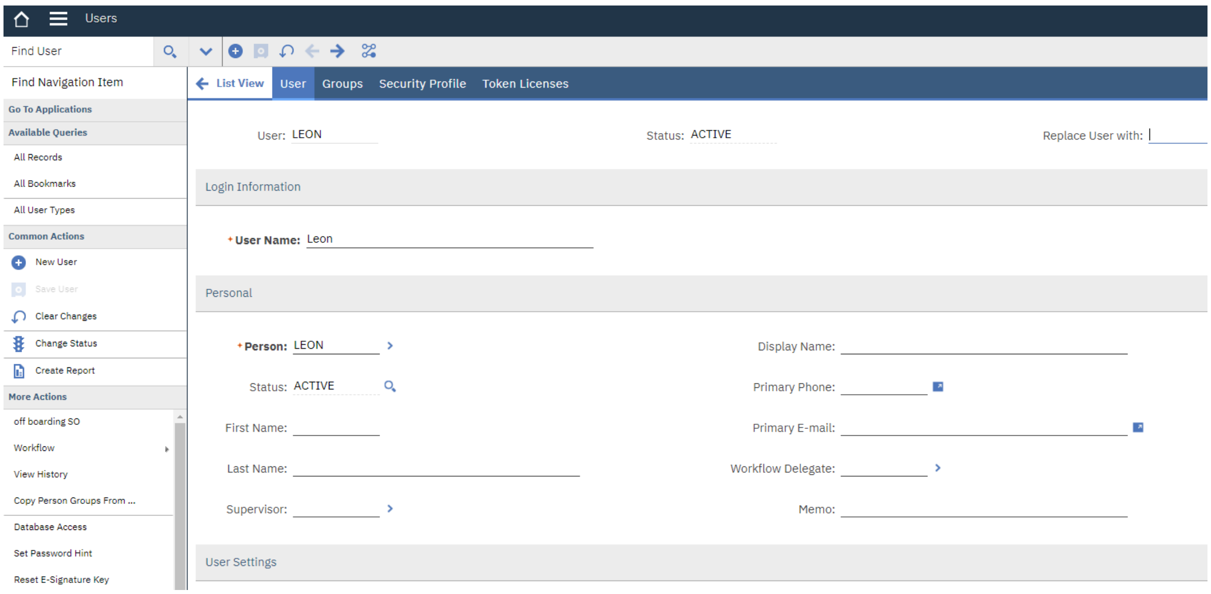
The addition of a new dialog that shows any records that need to be altered manually is very useful. Using the Go To menu, the administrator can go directly to the record that needs to be altered. This dialog will only ever appear if manual changes are required.


OffBoarding
Related Job Plans
Filter
1 - 1 of 1
Job Plan
Description
JP1
Inspect Pipes
Related PM
Filter
1 - 1 of 1
PM
Description
1001
Preventive Inspections
Related Person Groups
Filter
1 - 2 of 2
Person Group
Description
MCERPCRD
Repairs Coordinators
MCERPSTR
Repairs Stores
OK
KSITE
Kev's BPD Site

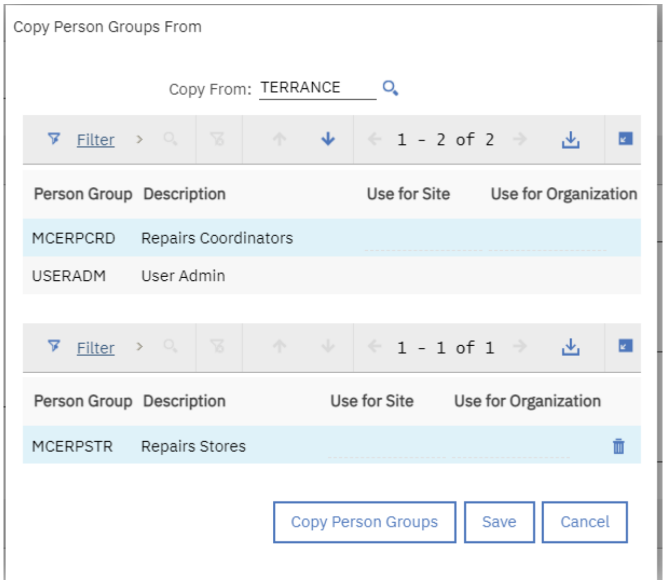
Copy Person Group Function

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.

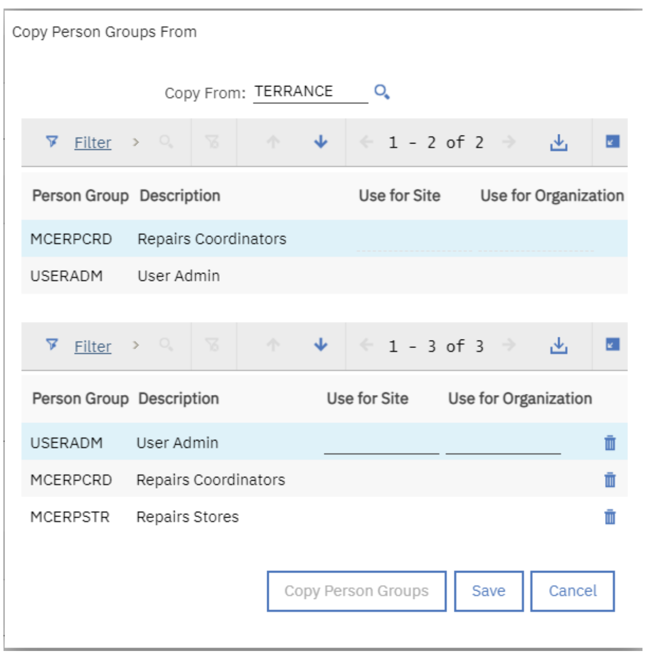
To utilise this functionality, go to the user application and select the user you wish to copy the groups to.



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.



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.



GURU

Explained

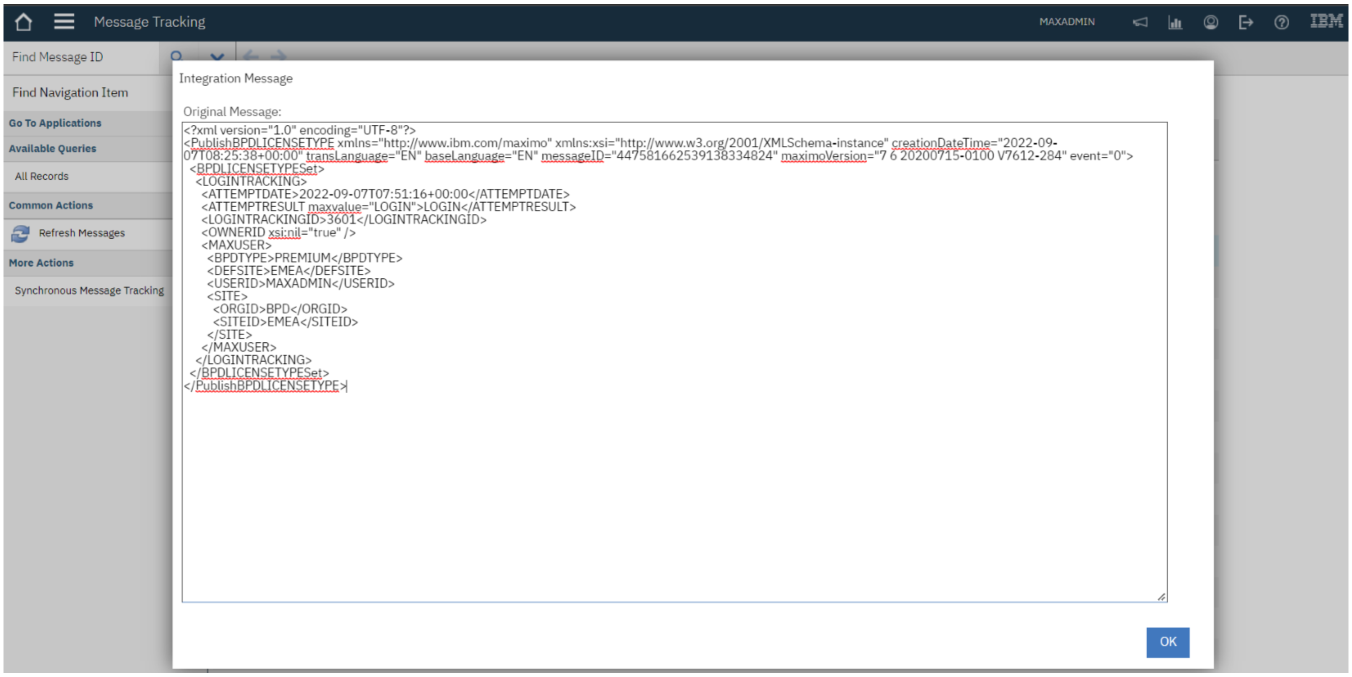
The BPD global usage reporting utility or BPD GURU, was created to help administrator to track the amount of MAS Points used by the users in the system. Also, to provide the users with a category that will be carried to MAS 8.

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.

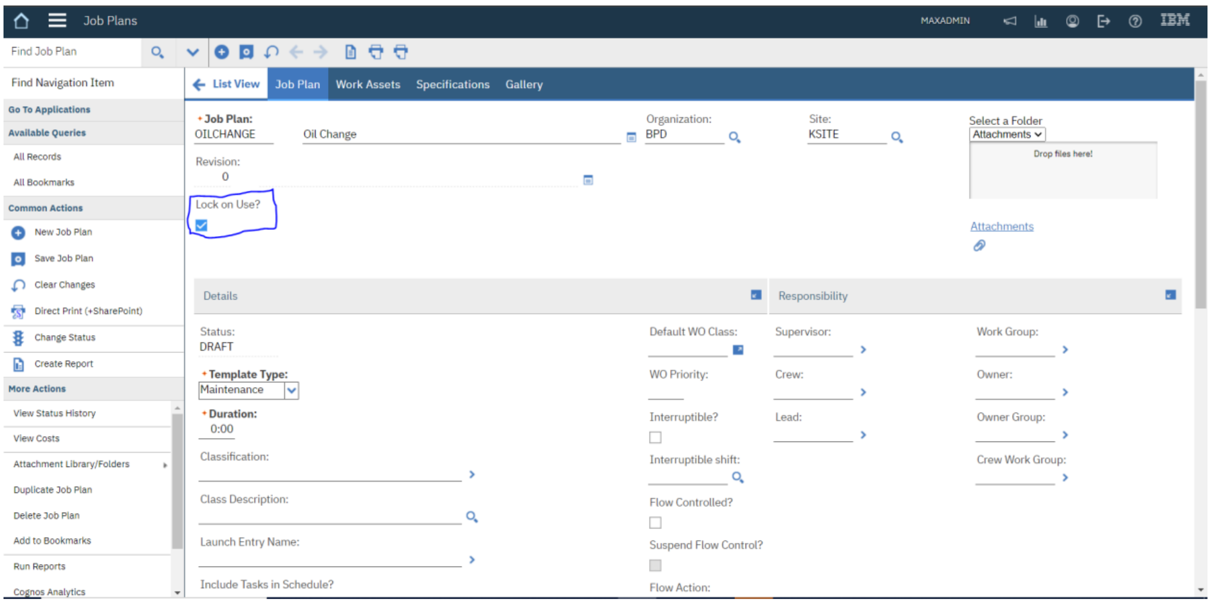
Decommissioning Token Server

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

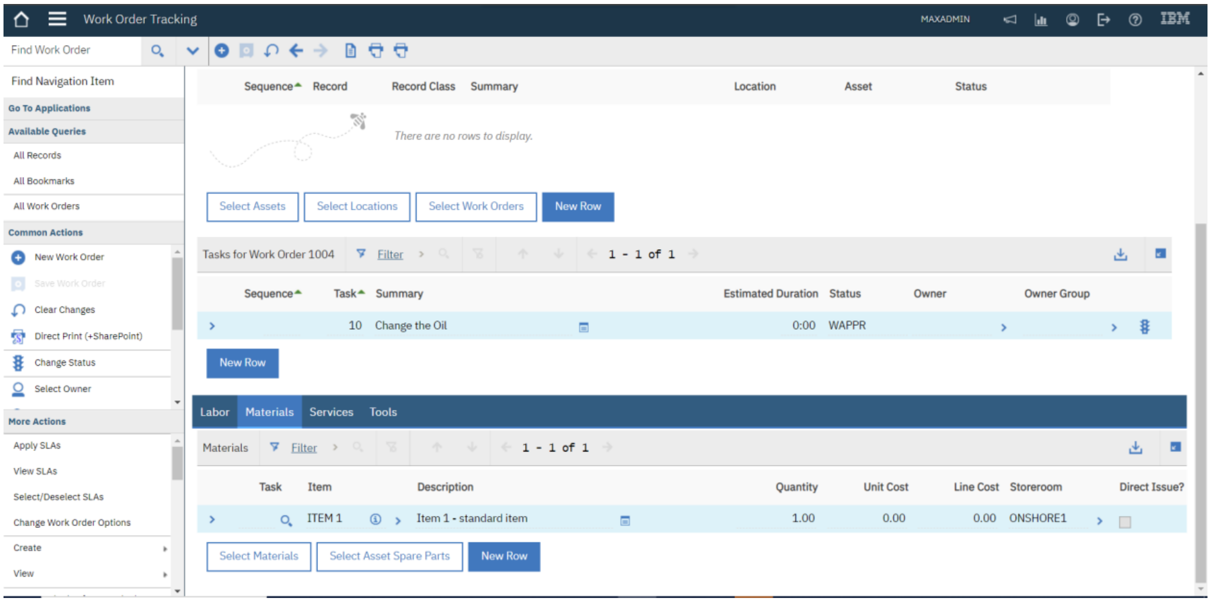
New Flag

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.



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.



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.

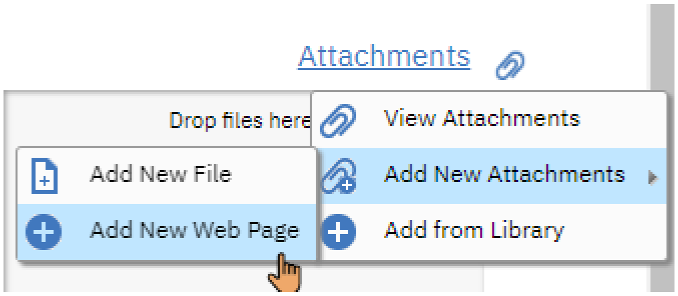
SharePoint Online must be visible to the Maximo Server.

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

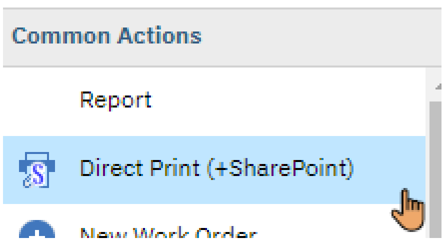
How to use this feature

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

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



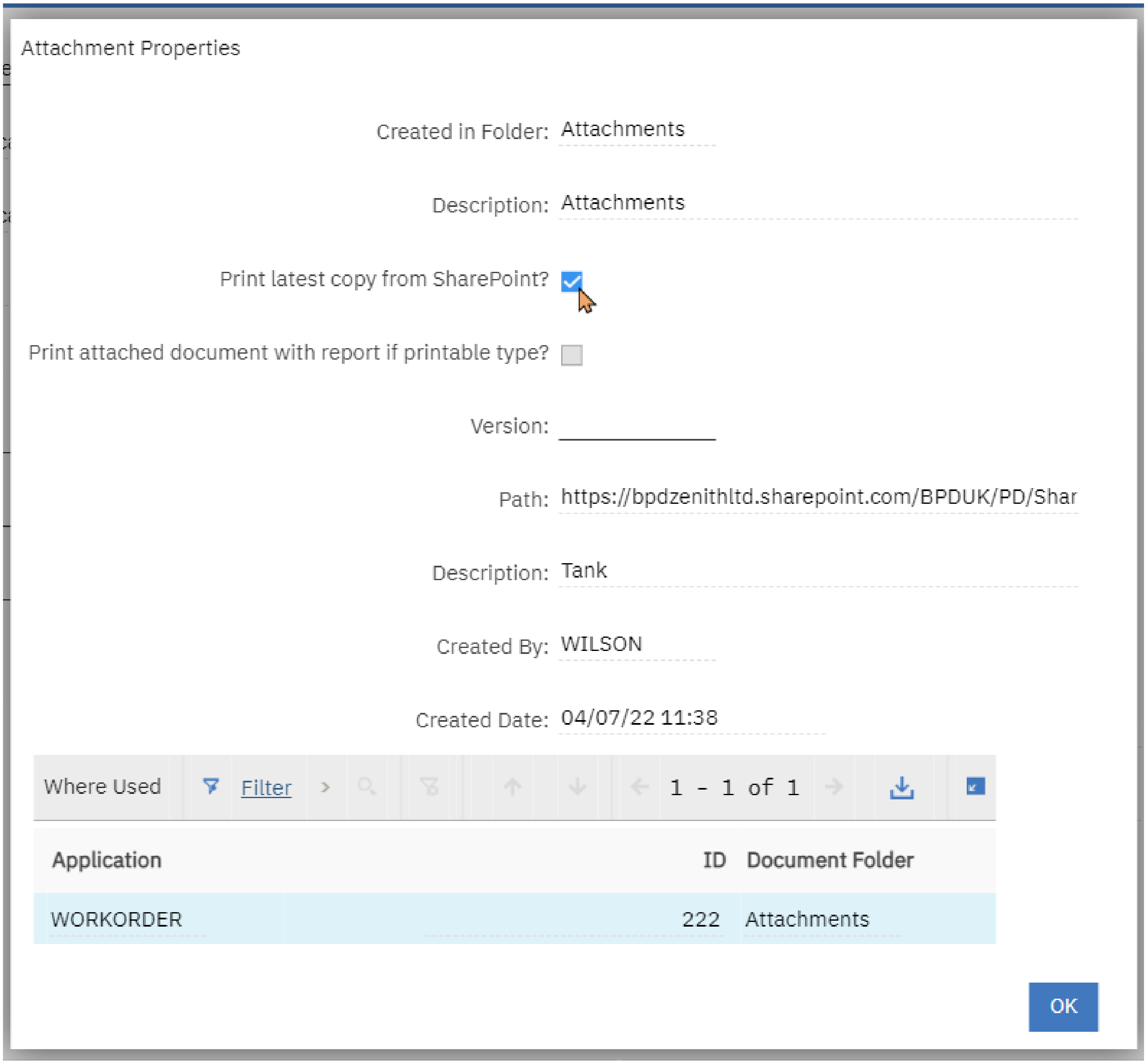
- Select your folder, paste in the URL of the SharePoint document, and set a name and description as you would for any URL Attachment.
- Tick the box labelled “Print latest copy from SharePoint?”
- Click OK.
- Use the new Common Action “Direct Print (+SharePoint)” to add any printable sharepoint documents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



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
Filter
1 - 1 of 1
Application
ID
Document Folder
WORKORDER
222
Attachments
OK