



# Maximo **Configurations** and **Tailoring** to Promote Ease of Use / Maintenance

Everything show works in  
7.6 (EAM) and 8.x (Manage)

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# About Projotech

Projotech, a Gold IBM Business Partner, offers IBM Maximo: the global standard in software for Enterprise Asset Management and maintenance. Since 1999, Projotech has been providing Maximo as a Service (MaaS), which allows clients to manage, maintain and scale their solution requirements while benefiting from flexible services and lower operating costs.

- 5 datacenters worldwide
- Maximo as a Service since 1999
- 150+ clients worldwide
- Manage 700+ VMs daily
- Manage 350+ instances daily
- Audited ISMS Policies
- IBM business partner since 1995
- Partner network of industry experts



# Introduction

- Maximo is delivered with tools to make it fit your use cases
  - Enhancements over the years have expanded both core application and add-on's
- This session will focus on no code to low code options that will work in Maximo 7.6.x as well as Application Suite Manage 8.x

# Org setting - W.O. Options

? Allow fields to be updated in Work Tracking ⚡ BOOST FOR: ▾

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Administration ×

+ Add a tag



Keith Henderson posted 08-04-2023 14:29

Good Afternoon

I know this is not best practice.

Is there a way to allow the asset and GL Acct fields to be updated after the work order has been set to in progress ?

Currently they are read-only.

Thanks

...


I have this question too • 0


ANSWER

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ANSWER



[Invading Moss](#) posted 08-04-2023 17:07

Navigate to Organizations -> Select Action -> Work Order - Edit Rules, a dialog will open which allows you to configure the edibility of Asset, Location, GL account etc at various Work Order statues

Helpful • 0



[Keith Henderson](#) posted 08-07-2023 09:01

Good Morning,

Thank you very.... much. Worked perfectly.

Helpful • 0

# Maximo Edit Rules for consideration

- Need to insert / update the asset number when work is at INPRG? Change the default settings

IBM Maximo Application Suite | Manage

## Organizations

### Edit Rules

Work Order Edit Settings (1 - 6 of 6)

Status	GL Account?	Asset?	Location?	WP Labor?	WP Materials?	WP Service?	WP Tools?	Safety Tab?	Dynamic Job Plan?	
▼ APPR	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
▼ COMP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
▼ INPRG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
▼ WAPPR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
▼ WMATL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
▼ WSCH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

1 - 6 of 6

Cancel OK

# Maximo Edit Rules for consideration

- Need to insert / update the asset number when work is at INPRG? Change the default settings

The screenshot displays the IBM Maximo Application Suite interface. The left pane shows the 'Organizations' menu with 'Edit Rules' selected. The main area is titled 'Work Order Edit Settings (1 - 6 of 6)'. It contains a table with columns: Status, GL Account?, Asset?, Location?, WP Labor?, WP Materials?, and WP Servi. The 'INPRG' row is highlighted, and a blue box is drawn around the 'Asset?' toggle switch, which is currently off. A mouse cursor is pointing at the toggle. The right pane shows 'Work Plan Edit Options' with a table containing columns: Status, GL Account, Equipment, Location, WP Labor, WP Materials, WP Tools, and Safety Tab. The table lists various work plan statuses and their corresponding settings.

Status	GL Account?	Asset?	Location?	WP Labor?	WP Materials?	WP Servi
APPR	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INPRG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WAPPR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WMATL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WSCH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Status	GL Account	Equipment	Location	WP Labor	WP Materials	WP Tools	Safety Tab
APPR	N	N	N	N	N	N	N
COMP	N	N	N	N	N	N	N
INPRG	N	N	N	N	N	N	N
WAPPR	Y	Y	Y	Y	Y	Y	Y
WMATL	N	N	N	N	N	N	N
WSCH	N	N	N	N	N	N	N

# Org setting – Labor options



Amy Tellier-Briggs posted 05-31-2023 08:04

Folks,

We are running Maximo 7.6.1.2. I have a technician that entered a -112.5 hour actual transaction that we need to get rid of. Problem is. he can't enter a +112.5 hour transaction to cancel it out because Maximo won't allow him to enter any more than 8 hours on a given day. Any ideas?

Thanks,  
Amy Briggs  
Jackson Laboratory

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Christopher Winston posted 05-31-2023 08:50 **Best Answer**

Query Based Reporting – Runti...

Technically this is ruled by the organization labor option setting for future labor transaction tolerance

The screenshot shows the 'Organizations' page in Maximo. A dialog box titled 'Labor Options' is open, displaying the following settings:

- Automatically Approve Inside Labor Transactions? ☒
- Automatically Approve Outside Labor Transactions? ☐
- Allow Mismatched Craft and Labor When Reporting Actual Labor? ☐
- Automatically Approve Invoices Created from Labor Transactions? ☒
- Future Labor Transaction Tolerance in Hours** 115:00

At the bottom of the dialog box are 'OK' and 'Cancel' buttons. In the background, the 'Organizations' page is visible, showing a list of organizations and a sidebar with navigation items like 'Find Organization', 'Find Navigation Item', 'Go To Applications', 'Available Queries', 'All Records', 'All Bookmarks', 'Common Actions', and 'More Actions'.

Change it to allow this transaction only, and then change it back after save. You should probably note this in your change control documentation as well in case it comes up on an audit, as you may not remember it was done.

# Domains – many delivered, but you can add as well

- Over 400 in v7.6.x; Over 550 in v8
- Example of a synonym domain to edit
  - MCOMP (FCOMP) synonym of INPRG
- Priority Fields have no delivered domains
  - Admin can add them
  - Populate with locally approved values
  - Attached to fields via db config
  - They stay attached through upgrade

SYNONYM Domain

Domain: WOSTATUS WO Status

Domain Type: SYNONYM

Length: 16

SYNONYM Domain Filter 1 - 10 of 11

<input type="checkbox"/>	Internal Value	Value	Description	Default
<input type="checkbox"/>	▶ APPR	APPR	Approved	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ CAN	CAN	Canceled	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ CLOSE	CLOSE	Closed	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ COMP	COMP	Completed	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ INPRG	INPRG	In Progress	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ INPRG	MCOMP	Maintenance Complete	<input type="checkbox"/>
<input type="checkbox"/>	▶ WAPPR	WAPPR	Waiting on Approval	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ WMATL	WMATL	Waiting on Material	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ APPR	WPCOND	Waiting on Plant Cond	<input type="checkbox"/>
<input type="checkbox"/>	▶ WSCH	WSCH	Waiting to be Scheduled	<input checked="" type="checkbox"/>

☐ Select Records

# Use Relationships for new attribute controls

The screenshot displays the IBM Maximo Application Suite interface. The main window is titled 'Application Designer' and shows a workspace for editing the 'PO' application. A 'Table Column Properties' dialog is open, showing the 'General' tab. The 'Attribute' field is set to 'PO\_VENDOR.NAME', and the 'Type' is set to 'Text'. A green box highlights the 'Description' field in the dialog, with a hand cursor pointing to it. A blue arrow points from the 'PO\_VENDOR.NAME' attribute field to the 'Description' field.

The 'Relationships' tab is also visible, showing a list of relationships for the 'PO' object. The relationships are:

Relationship	Child Object
PO_BILLTO	COMPANIES
PO_SHIPTO	COMPANIES
PO_VENDOR	COMPANIES
VENDOR	COMPANIES

The bottom of the screen shows a table of data:

Item ID	Quantity	Description	Appr	ATI	Company
1000	0	Store Replenishment	APPR	ATI	Atlantic Trading, Inc
1004	0	1 Inch ID Copper Tubing	APPR	ATI	Atlantic Trading, Inc
1010	0	General Plumbing Supplies	APPR	HELWIG	Helwig Company
1011	0	Plumbing Supplies	APPR	HELWIG	Helwig Company

# Application Designer Considerations

- Modify Actions if needed to better explain them
- Modify lookups to enhance usability

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## Work Order Tracking

← List View <

🔍 Find Navigation Item

Available Queries ▾

Create ^

Follow-up Work Order

Service Request

Incident

Follow-up Work Order

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## Work Order Tracking

### Select Value

(1 - 20 of 78)

<input type="checkbox"/> Asset	Description	Serial #	Location
<input type="checkbox"/>			
<input type="checkbox"/> 11210	Circulation Fan- Centrifugal/ 20/000 CFM	3749-9	BR
<input type="checkbox"/> 11240	Circulation Fan- Centrifugal/ 20/000 CFM	3749-9	BR
<input type="checkbox"/> 11250	Circulation Fan- Centrifugal/ 20/000 CFM	3749-9	BR
<input type="checkbox"/> 11430	Centrifugal Pump 100GPM/60FT HD	377-9A	BR
<input type="checkbox"/> 11430_01	Centrifugal Pump 100GPM/60FT HD	11430752	BR
<input type="checkbox"/> 11450	Centrifugal Pump 100GPM/60FTHD	377-9B	BR

# Substitution Variables for Q's and QBR's

related to the current user's default insert site:

- ... (siteid in (select defsite from maxuser where userid= :USER))

related to the current user being the person assigned as lead (replace 'lead' below with reportedby, supervisor, owner, etc., as needed)

- ...lead = (select personid from person where personid = (select personid from maxuser where userid = :USER ))

related to the current user being the person on a team assigned as owner group (replace ownergroup with persongroup if needed)

- ownergroup in (select persongroup from persongroup where persongroup in (select persongroup from persongroupteam where respparty in (select personid from person where personid = (select personid from maxuser where userid = :USER ))))

You can also have other substitution variables in the same query such as, a query for work awaiting approval over 90 days (replace getdate() with SYSDATE for Oracle)

- ...status = 'WAPPR' and reportdate > getdate()-90)

# Substitution Variables for Assignments Tab

Related to the current user being assigned on the Assignments Tab

- ((woclass = 'WORKORDER' or woclass = 'ACTIVITY') and historyflag = 0) and (exists (select 1 from dbo.assignment where **laborcode = (select laborcode from labor where personid = (select personid from person where personid = (select personid from maxuser where userid = :USER))))**) and (exists (select 1 from workorder yy where ((yy.istask = 1 and yy.parent = workorder.wonum ) or (yy.wonum = workorder.wonum)) and assignment.wonum = yy.wonum and yy.siteid = workorder.siteid) and siteid = workorder.siteid)))

Purchase Orders with open receiving (use in Receiving and PO apps)

- ((status in ('APPR', 'INPRG') and (upper(receipts) = 'NONE' or upper(receipts) = 'PARTIAL') and historyflag = 0)


In Purchase Orders, to find p.o.'s where the user is the buyer

- (historyflag = 0 and purchaseagent = (select personid from person where personid = (select personid from maxuser where userid = :USER) ) and siteid = 'BEDFORD')

# Roles & Communication Templates

Comm

## Create Communication

 To create communication, select a template or directly enter the message and details.

Template

PONOTIFICATIC >

To

POI George.Defrost@CMC.com, Gerald.Denning@CMC.com 

cc


Ro




bcc

Subject

Purchase Order Report 1114 / Changeover Managemen

Message



Font  Size small  Format None 

Please see the attached purchase order 1114. Reference this PO number on invoices related to this order; submit invoices to [ap@mycompany.com](mailto:ap@mycompany.com). **Please review the attached PO and Acknowledge Receipt.**

If there are any questions or concerns, please contact My Company's Procurement Team at [buyer@mycompany.com](mailto:buyer@mycompany.com).

For extremely urgent matters or concerns, please contact the My Company's Procurement Team, at 555-555-1234.

**\* Send From**

donotreply@emaximo.com

Reply To


buyer@mycompany.com

Role


POVNDCTCT

Purchase Order Vendor Contacts

**\* Type**

A set of data rel. 

Custom class

A set of data related to the record 

Email address

Person

Person Group

A set of data related to the login user

Object

PO 

**\* Value**

:PO\_VENDOR.CONTACT.email 

Parameter

:PO\_VENDOR.CONTACT.email

E-mail?



# Conditional Expressions & Usage

- Conditional User Interface (UI)
- Conditional Signature Options
- Global Data Restrictions for all users
- Global Data Restrictions for select security groups
- Almost no more cloning / duplicating applications to impose different requirements

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## Conditional Expression Manager

> All Conditions (1 - 6 of 6)

Condition	Description	Type	
asset			Q
ASSETMETER	Are there any asset meter records?	EXPRESSION	Q
ASSETTYPE_FL	Fleet Type Asset	EXPRESSION	Q

### Details

Give the condition a name that will help you identify the condition when you apply it in the Security Groups application evaluated.

Condition

ASSETTYPE\_FL Fleet Type Asset

\*Type

EXPRESSION Q

\*Expression

:assettype = 'FLEET'

Class

Always Evaluate?

Reference Count

3

Condition Expression Builder

# Conditional User Interface

- Allows you flexibility in requiring, hiding or making something read only depending on the 'condition'

## Global Data Restrictions

Object Restrictions		Attribute Restrictions			
Object		Attribute		Application	
ASSET	ASSETTAG	ASSET	REQUIRED		
ASSET	PRIORITY	ASSET	REQUIRED		
ASSET	SERIALNUM	ASSET	REQUIRED		

Type

FLEET

\*Asset Tag

12559

Asset Template

>

Calendar

COMPANY1

Shift

\*Priority

2

\*Serial #

JA12337

# Add Calculations to Reporting Library

- Query Based Reporting can be enhanced with additional calculation expressions by adding them to the library
- Confirm the syntax is correct and be sure to test and re-test before adding to production

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## Report Administration

Find Navigation Item <

Available Queries ▾

**Common Actions**

- + New Report
- Create Report

**More Actions**

- View Report Processing
- View Scheduled Reports
- View Group Security
- Set Security Group Limits
- Set Application Security
- Set All Application Security
- Set Report Object Structure Se...
- Remove All Application Security
- Define Ad Hoc Reporting Library
- Set Report File Export Options

### Ad Hoc Report Expression Library

Define the expression keywords that users can use when they create SQL expressions in ad hoc reports.

Keywords (1 - 6 of 6)

Expression Id	Expression	Description	
CASEWHEN	case when (<EXPR>) then <TRUE> else	Used for Conditional Expressions	🗑️
Date	&DATE&	Maximo Date variable	🗑️
DateTime	&DATETIME&	Date-time variable	🗑️
DayDateDiff	datediff(day,&DATETIME&,<FIELD>)	Calculate the amount of days between tr	🗑️

#### Details

Expression Id

DayDateDiff

Description

Calculate the amount of days between today and the field specified (this could be negative if the field is in the past)

\*Expression

datediff(day,&DATETIME&,<FIELD>)

# Query Based Reporting – Runtime Parameters

How is this done?

- Create and Save QBR
- In Report Administration, add Parameters
- Set Attributes as needed
  - For Dates, remember to enter Earliest and Latest parameters to allow for date range
  - Enter a display name so that the user can tell the difference between fields
  - Set operator as needed ( $\geq$  for Earliest /  $\leq$  for Latest/ etc.)
  - Add the lookup as needed (datelookup, site, etc) to simplify usage
  - Save and then click on 'Generate Request Page' (if required)
- Resulting QBR may also be run from Start Center

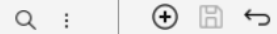
# Query Based Reporting – Runtime Parameters

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Take a tour



## Report Administration



> **Report** Security Performance ▾

Report File Name

WOTRACK\_MAXADMIN\_1680630513.rptdesign

Work History - Hours & Costs per Actual Finish Date Range

Last Import Date

4/4/23 5:55 PM

Report Type

BIRT



Imported by

MAXADMIN

Application

WOTRACK



Report Folder

WOTRACK

Ad Hoc Report Settings

Settings

Parameters (1 - 3 of 3)



	Parameter Name	Attribute Name		Sequence	Display Name	Multi-Lookup Enabled? Operator	Required?
▼	Site ID	siteid			Site ID('s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▼	Earliest Actual Finish Date	actfinish		1	Earliest Actual Finish Date	<input type="checkbox"/> >=	<input checked="" type="checkbox"/>
▼	Latest Actual Finish Date	actfinish		2	Latest Actual Finish Date	<input type="checkbox"/> <=	<input checked="" type="checkbox"/>

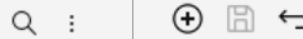
1 - 3 of 3

<=

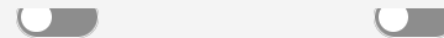
# Integration Module: Object Structures

- Should be used for:
  - Start Center Results Sets
  - Query Based Reporting
  - Work Centers
- Be careful with changes to object structures

## Object Structures



### > Object Structure



Source Objects for REP\_INVENTOR\_ITEM (1 - 4 of 4)



Object	Parent Object	Object Location Path	Relationship	Object Order	User Defined?	Exclude Attributes Mode?	
▼ INVENTORY	🔍	> INVENTORY	🔍	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	🗑️
▼ INVCOST	🔍 INVENTORY	> INVENTORY/INVCOST	INVCOST 🔍	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	🗑️
▼ INVBALANCES	🔍 INVENTORY	> INVENTORY/INVBALANCES	INVBALANCES 🔍	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	🗑️
▼ ITEM	🔍 INVENTORY	> INVENTORY/ITEM	ITEM 🔍	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	🗑️

## Useful Reference Links

- ORG Settings: <https://www.ibm.com/docs/en/mam/7.6.0?topic=pms-limitations-when-setting-up-options-in-organizations-application-1>
- Conditional UI: <https://www.ibm.com/support/pages/four-ways-using-conditional-expressions-maximo>
- SQL Reference: [https://www.techonthenet.com/sql\\_server/index.php](https://www.techonthenet.com/sql_server/index.php)
- System Properties: <https://www.ibm.com/docs/en/mam/7.6.0?topic=reference-system-properties>
- Domain Types: <https://www.ibm.com/docs/en/mam/7.6.1.1?topic=overview-types-domains>
- Ad-Hoc reporting library:  
<https://community.ibm.com/HigherLogic/System/DownloadDocumentFile.ashx?DocumentFileKey=6f4ce1bc-74b6-a5dc-9753-0af4832ba137&forceDialog=1>
- Runtime Parameters for QBR: <https://youtu.be/RF9Udi3qyd0>
- Generate your ERD: <https://tinyurl.com/GenerateERD>
- Application Configuration Best Practices: <https://tinyurl.com/AppConfigBPs>
- Relationships for use in Application Designer: <https://tinyurl.com/UseRelationshipsInAD>
- Understanding Search Methodologies: <https://tinyurl.com/SearchMethodologies>
- Configuring Search Methodologies: <https://tinyurl.com/ConfigSearchMethods>
- Object Structures for Work Centers: <https://www.ibm.com/docs/en/mam/7.6.0.92?topic=centers-object-structures-work>