

Key New Features in Manage

Presented by:

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Agenda

- Introduction
- Asset Manager
- Start Center vs. Operational Dashboard
- Operational Dashboard
 - Cards
- Work Queues
- Future Items of Note
- Useful Links
- Questions



- Delivering Maximo Managed Solutions since 1999
- Manage 450+ Total Maximo Environments Daily
 - Includes 50+ Maximo Application Suite (MAS) Environments
- Global partner network



Asset Manager

Asset Details

reciprocating Compressor- Air Cooled/100 CFM 11300

ip ↑ Not Ready ▾

🔍 -
Parent asset

📍 -
Service address

-
Classification
 BR300 Boiler Room Reciprocating Compressor
 Location
 IR Ingersoll-Rand Company
 Vendor
 IR Ingersoll-Rand Company
 Manufacturer



43960
 Serial Number
 -
 Feature Class
 -
 Failure Class
 -
 Type


- Leverages 'Custodian' feature
- Quick access to basic data
 - Including Attachments
- Read only plus status change available

Start Center vs Operational Dashboard (O.D.)

- Is Start Center being replaced by Operational Dashboard?
 - Some day, probably. For now, no further enhancements to Start Centers
- O.D. Edit functions available as of 8.11
- How many O.D.'s are available in MAS 8
 - Only 1; more in MAS 9
- Grant access via Security
 - Application, Object Structure, Default App
- Set O.D. as Default Application Sparingly

Security Groups


> **Group** Sites Applications Object Structures Storerooms Labor GL Con

Group
MAXADMIN Maximo Administrators (Super Users) 

Start Center Template
5 Administration

Independent of Other Groups?

Default Application
i Users with exactly one Default Application defined according to their group membership will auto

Default Application
OPDASHBOARD  Operational Dashboard

Start Center vs Operational Dashboard (O.D.)

Start Center Portlets

- Quick Insert
- Bulletin Board
- Favorite Applications
- Inbox / Assignments
- KPI Graph
- KPI List
- Report List
- Result Set

Operational Dashboard Cards

- Value
- Table
- Favorites
- Quick Actions
- KPI Value
- KPI Chart (Trend)
- KPI Comparison
- Workflow
- Work Queues

Start Center vs Operational Dashboard (O.D.)

Start Center Portlets

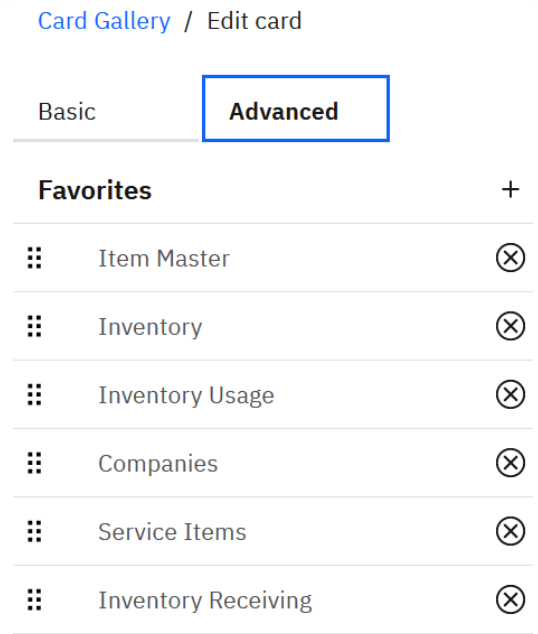
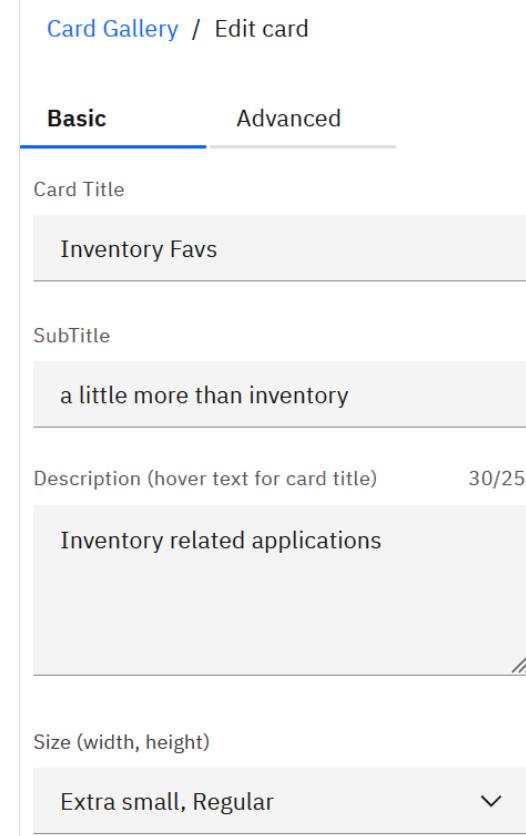
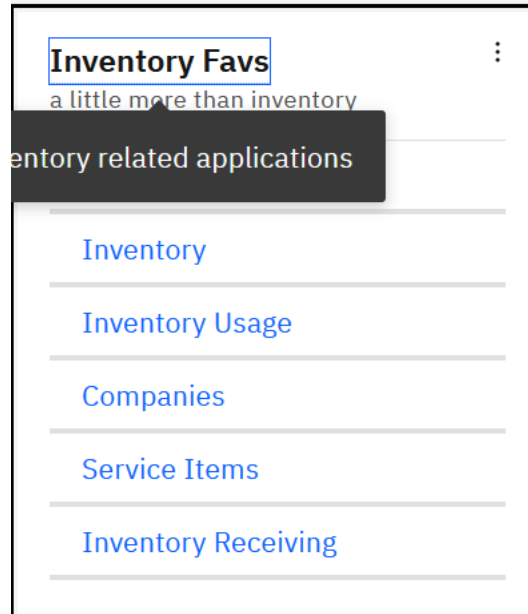
- Quick Insert
- ~~Bulletin Board~~
- Favorite Applications
- Inbox / Assignments
- KPI Graph
- KPI List
- ~~Report List~~
- Result Set???

Operational Dashboard Cards

- Value
- Table
- Favorites
- Quick Actions
- KPI Value
- KPI Chart (Trend)
- KPI Comparison
- **Workflow**
- Work Queues

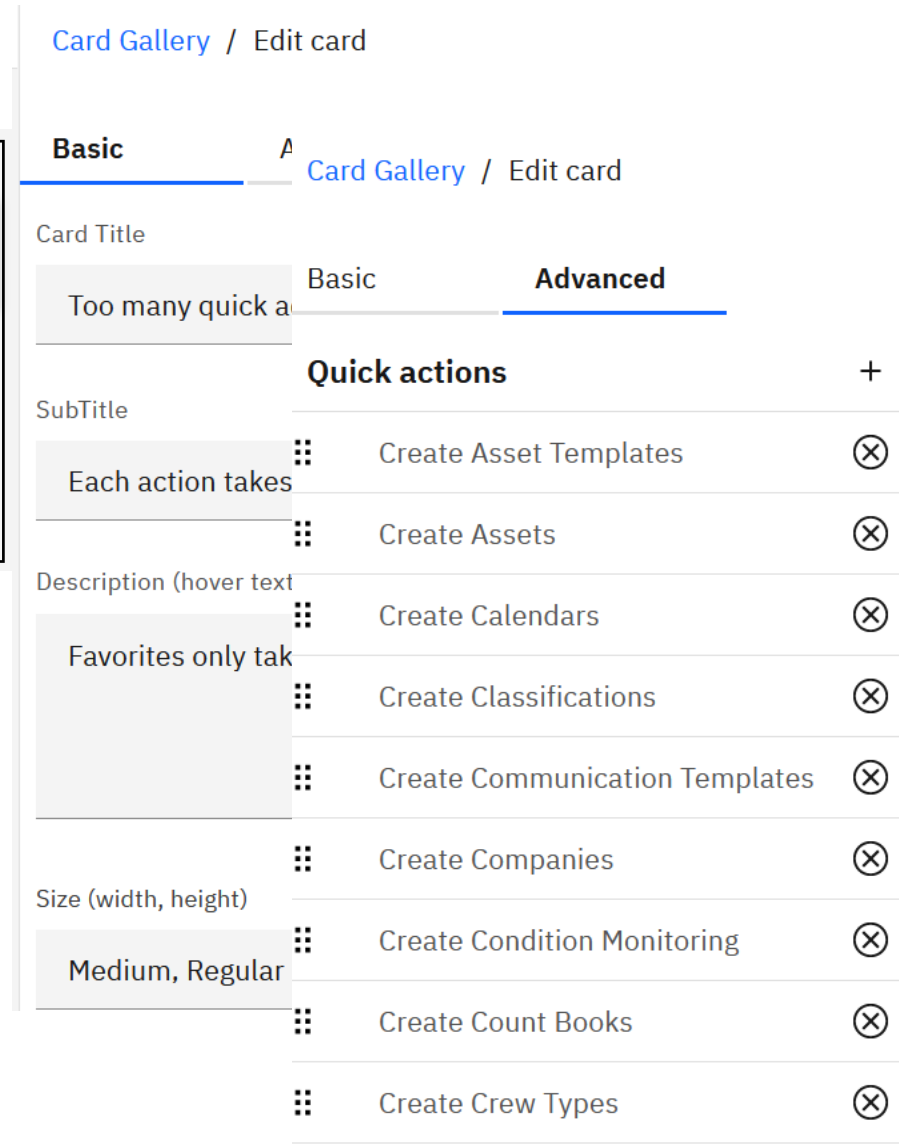
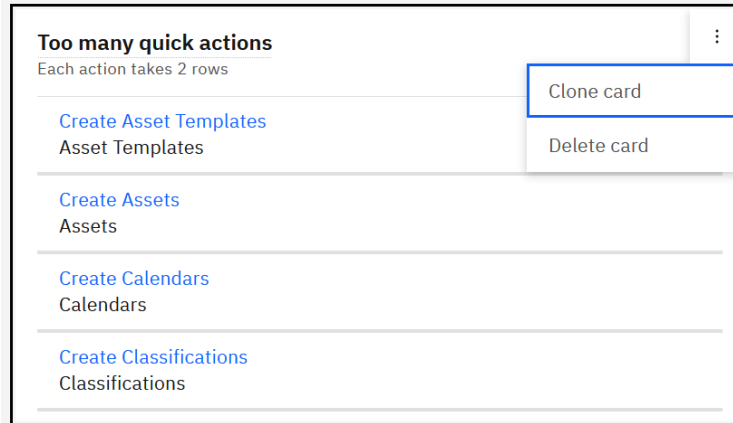
O.D. – Favorites

- Used to group applications or tools as needed
- Respect security when setting these up
- You may want to skip the subtitle
- Consider extra small width all the time
- Reordering Allowed



O.D. – Quick Actions

- Used to group applications or tools as needed
- Respect security when setting these up
- You may want to skip the subtitle
- Consider extra small width all the time
- Reordering Allowed



O.D. – KPI Value

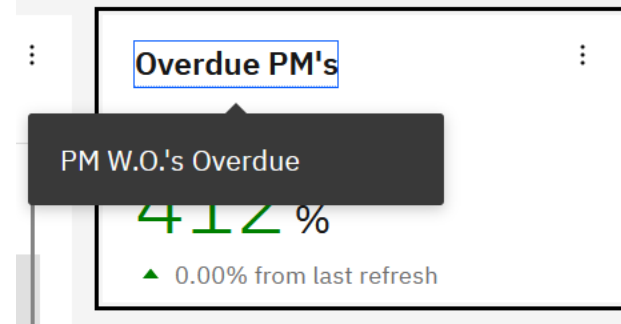
- Displays single value
- No refresh button on KPI; need to use page refresh button
- No hyperlink to KPI

Overdue PM's

Over target by 407.00

412 %

▲ 0.00% from last refresh



[Card Gallery](#) / [Edit card](#)

Basic

Advanced

KPI

KPI-7



[Card Gallery](#) / [Edit card](#)

Basic

Advanced

Card Title

Overdue PM's

SubTitle

Description (hover text for card title)

17/255

PM W.O.'s Overdue

Size (width, height)

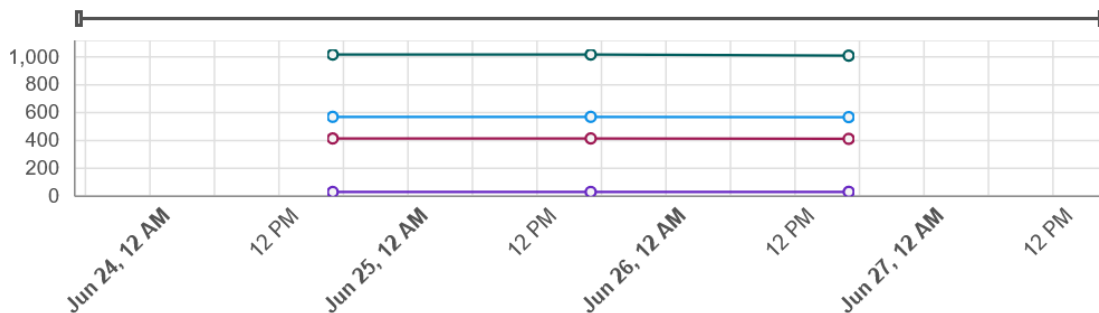
Extra small, Short



O.D. – KPI Chart / Trend

- Not available on start center
- No refresh for card; use page refresh
- No access to KPI on click

KPI Chart / Trend Tile



EMWOOVER KPI-10 KPI-4 KPI-7

Card Gallery / Edit card

Basic Advanced

Card Title
KPI Chart / Trend Tile

SubTitle

Description (hover text for card title) 0/255

Size (width, height)
Medium, Regular

Card Gallery / Edit card

Basic Advanced

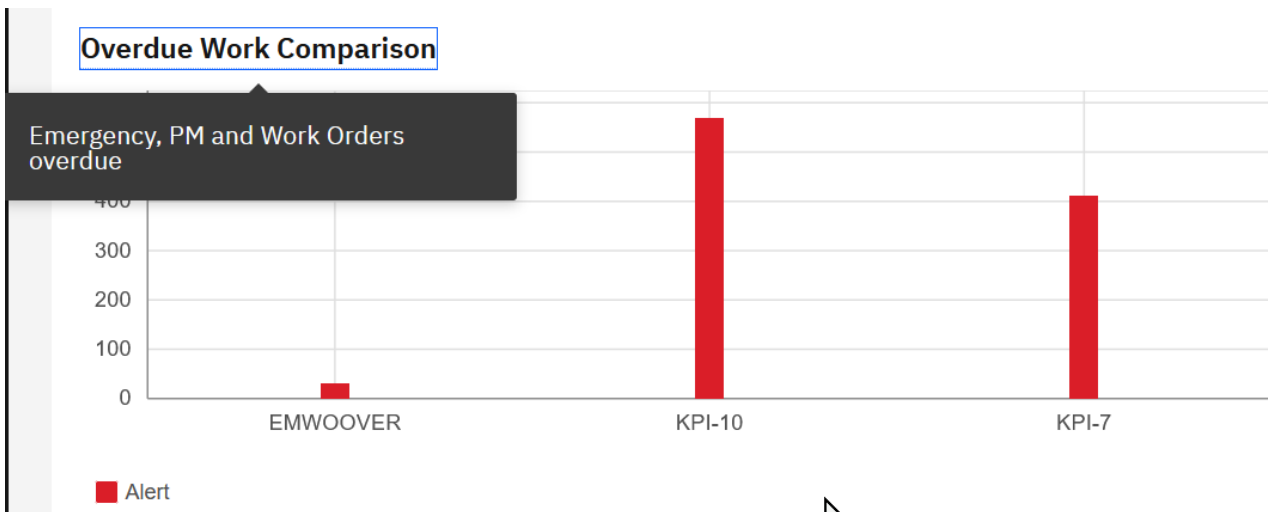
Time range
Last 7 days

KPI
EMWOOVER

Compare with
KPI-10
KPI-4
KPI-7

O.D. – KPI Comparison

- Compare multiple KPI's – can reorder
- No refresh for card; use page refresh
- No access to KPI on click



[Card Gallery](#) / [Edit card](#)

Basic / Advanced

Card Title

Overdue Work Comparison

SubTitle

Description (hover text for card title)

37/255

Emergency, PM and Work Orders overdue

Size (width, height)

Medium, Regular

[Card Gallery](#) / [Edit card](#)

Basic / **Advanced**

Chart type

Bar

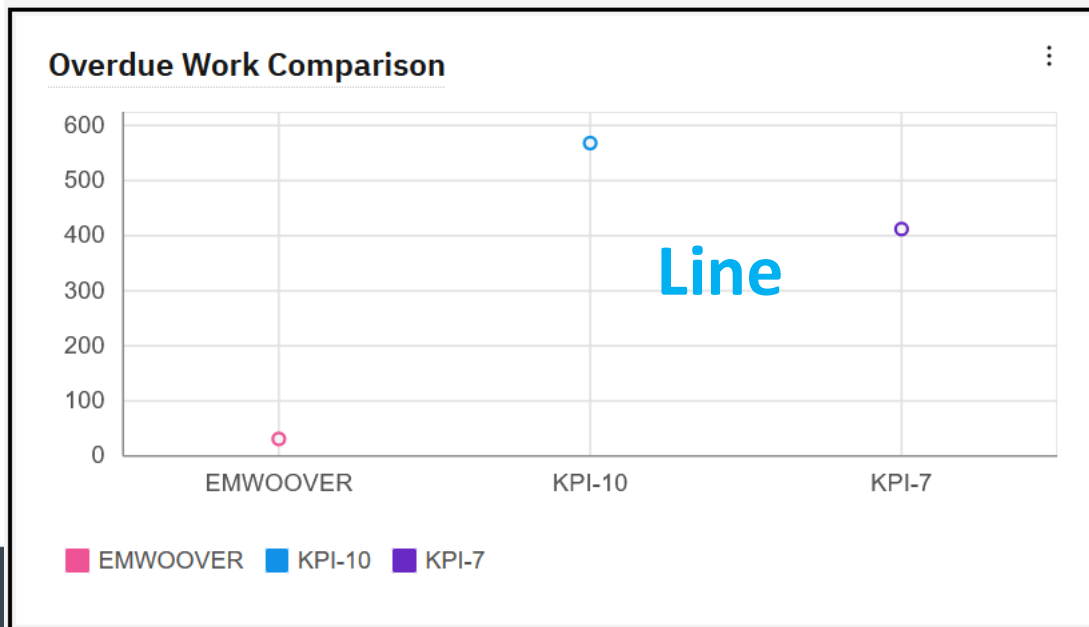
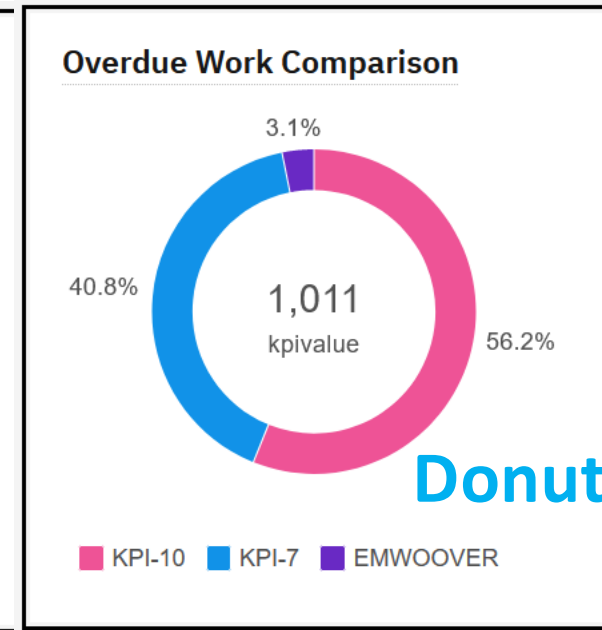
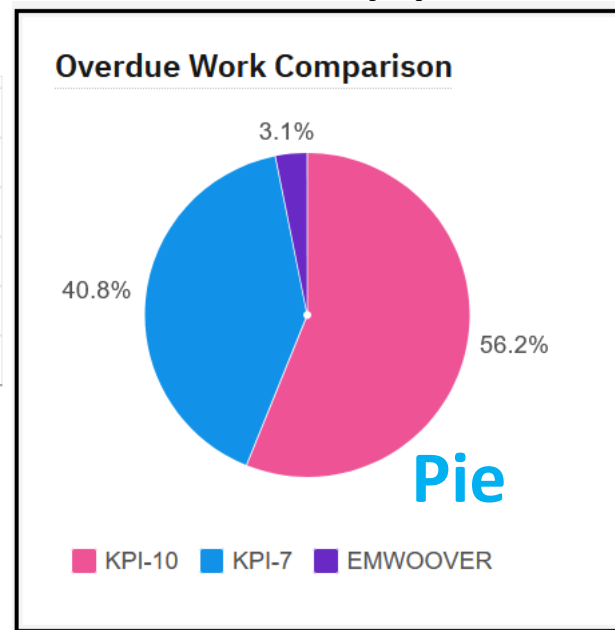
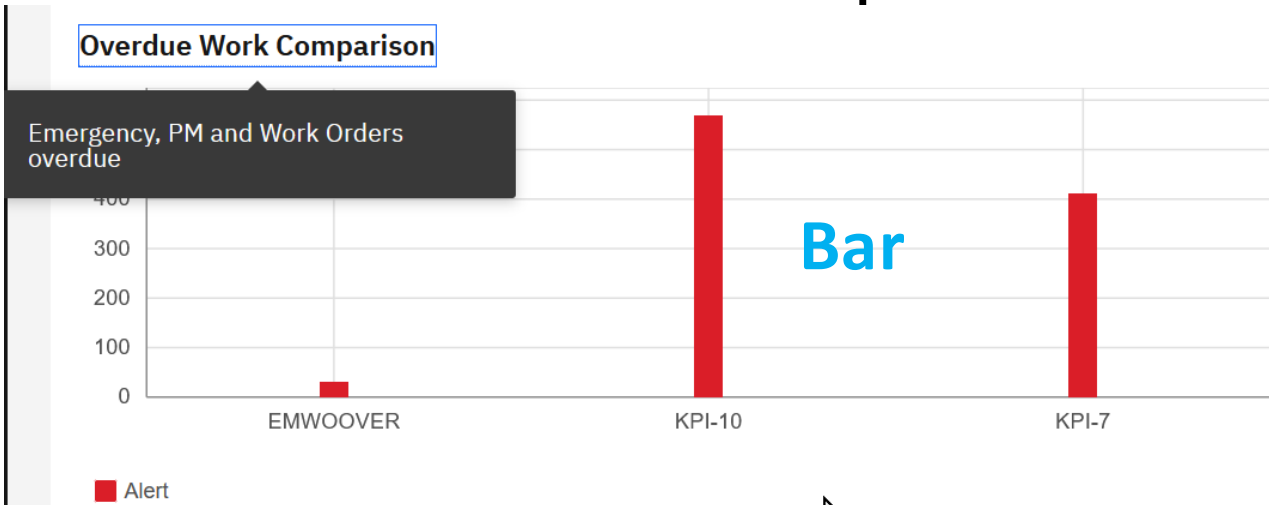
KPIs

EMWOOVER

KPI-10

KPI-7

O.D. – KPI Comparison – chart types



O.D. – Workflow

- Card has similar design to others
- Do not DELETE this card

Workflow assignments due soon		Due Date
<input type="checkbox"/>	Assignment	
<input type="checkbox"/>	Review PR for Approval Site BEDFORD, PR 1009	6/27/24 2:33:10 pm
<input type="checkbox"/>	Review PR for Approval Site BEDFORD, PR 1008	6/27/24 2:32:49 pm

Items per page: 4 | 1-2 of 2 items | 1 | 1 of 1 pages

Card Gallery / Edit card

Basic Advanced

Card Title

Workflow assignments due soon

SubTitle

Unspecified

Description (hover text for card title)

Review assignments that are due in the next 24 hours or overdue.

Size (width, height)

Medium, Regular

Card Gallery / Edit card

Basic Advanced

Rows per page

4

Datasource

wflistDS

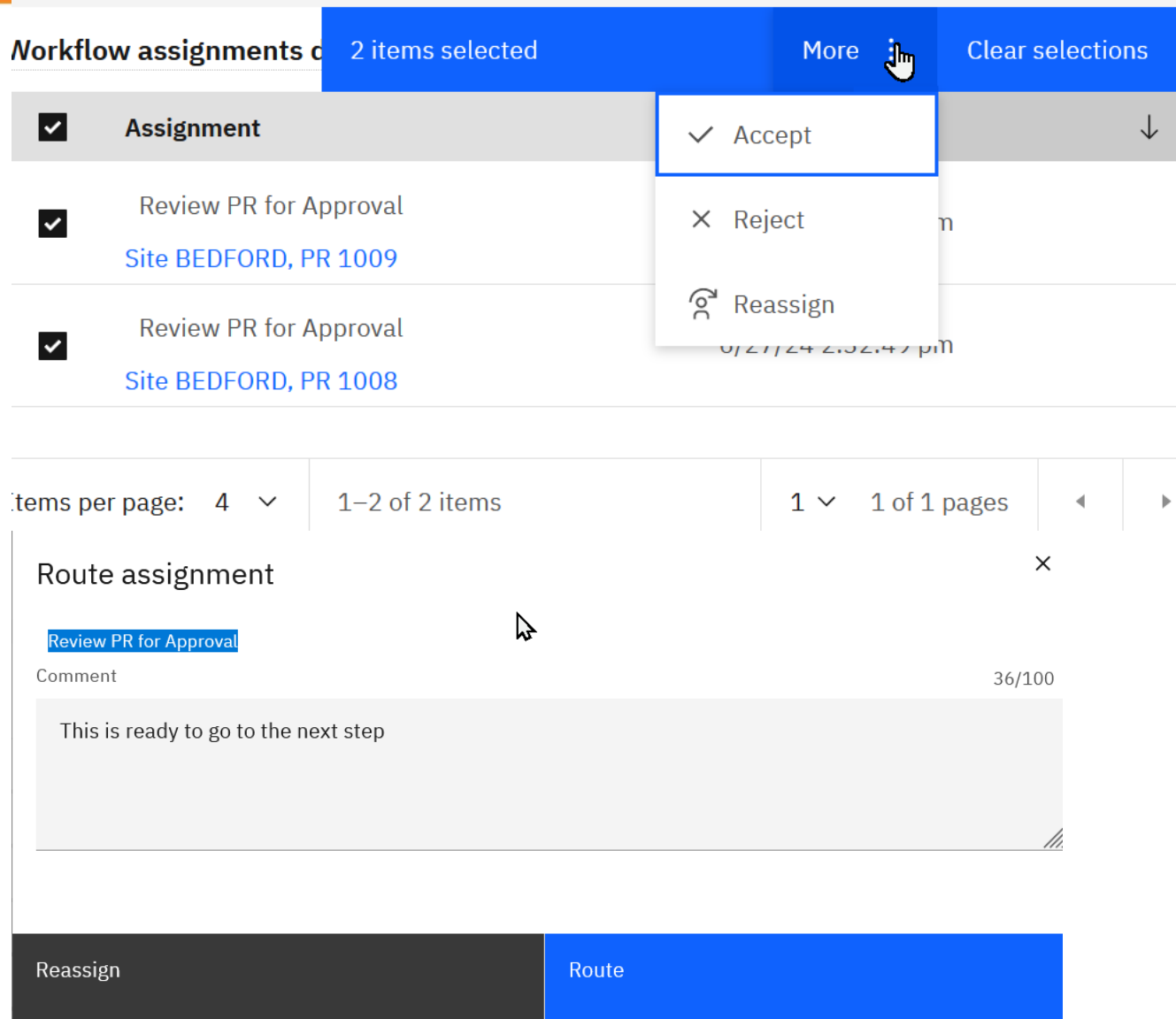
Table Headers

Assignment

Due Date

Workflow Processing

- Action available on single or multiple records
- Hyperlink will go to record in owning application
- Typical options are available
- Remember to enter a memo if reassigning or rejecting



Workflow assignments 2 items selected More Clear selections

Assignment	
<input checked="" type="checkbox"/> Review PR for Approval Site BEDFORD, PR 1009	Accept
<input checked="" type="checkbox"/> Review PR for Approval Site BEDFORD, PR 1008	Reject
	Reassign

Items per page: 4 1-2 of 2 items 1 1 of 1 pages

Route assignment

[Review PR for Approval](#)

Comment 36/100

This is ready to go to the next step

Reassign Route

O.D. - Work Queues

- A Work Queue is essentially a Result Set
- You can / should still use substitution variables for queries
- You may need to modify security including Object Structures
 - MXAPIACTION - Read
 - MXAPIWORKQUEUE – Save / Insert
 - Note that errors may omit the ‘MXAPI’ part of the object structure
- Build via Work Queue Manager tool

Object Structures (1 - 1 of 1)

Object Structure	Description
action	

MXAPIACTION Action Definition

1 - 1 of 1

Options for Action Definition (1 - 4 of 4) Grant Lis

Description	Grant Access?
▼ Delete MXAPIACTION	<input type="checkbox"/>
▼ Insert MXAPIACTION	<input type="checkbox"/>
▼ Read MXAPIACTION	<input checked="" type="checkbox"/>

Work queues

[Create work queue +](#)

Results: 1



Work queu... ↑	Description	Priority	Count	State
OPEN BOILER...	Open Work on...	3	156	<input checked="" type="checkbox"/> Active

Items per page: 10 ▾

1-1 of 1 items

1 ▾ 1 of 1 pages

[Work queues](#) / CreateWorkQueue

Create work queue

①

②

③

1. Define work qu...
2. Define query
3. Add actions
Optional

***Name**

OPEN WORK WHERE I AM LEAD

Description

APPR and INPRG work orders where I am LEAD

Priority

2

-

+

1 = Urgent, 2 = High, 3 = Medium, 4 = Low

Cancel ×

Back <

Next >

[Work queues](#) / [CreateWorkQueue](#)

Create work queue

- 1. Define work queue
- 2. Define query
- 3. Add actions
Optional

Object structure

MXAPIWODETAIL

*Query

A valid entry is required

Launch application

WOTRACK

State

Active

Cancel ✕

Back <

Next >

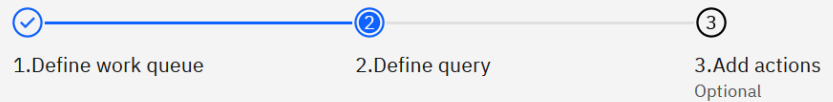
Select Query

Search Clear all filters

Query	Description
open	title
<input type="radio"/> WOTRACK:Open...	Open and LEAD i...
<input type="radio"/> WOTRACK:Open...	Open Work Orde...

Cancel OK

Create work queue



Object structure

MXAPIWODETAIL ✕

*Query

WOTRACK:Open and LEAD is Me 🔍

Launch application

State

WOTRACK ✕ Active

Select the fields to be displayed in the query table

Available fields	Selected fields
<input type="text" value="Search"/>	
<p>0 item selected Clear changes</p> <p><input type="checkbox"/> parent</p> <p><input type="checkbox"/> aos</p> <p><input type="checkbox"/> estservcost</p>	<p>Select fields from the available fields list</p>

Select the fields to be displayed in the query table

Available fields	Selected fields
<input type="text" value="date"/> ✕	
<p>8 items selected Clear changes</p> <p><input type="checkbox"/> plusnextdate</p> <p><input type="checkbox"/> pmduedate</p> <p><input checked="" type="checkbox"/> targcompdate</p> <p><input type="checkbox"/> splanreviewdate</p> <p><input type="checkbox"/> faildate</p> <p><input type="checkbox"/> pmnextduedate</p> <p><input type="checkbox"/> changedate</p> <p><input type="checkbox"/> targstartdate</p> <p><input checked="" type="checkbox"/> reportdate</p> <p><input type="checkbox"/> measuredate</p> <p><input type="checkbox"/> availstatusdate</p> <p><input type="checkbox"/> pcpchangedate</p>	<p><input checked="" type="checkbox"/> wonum</p> <p><input checked="" type="checkbox"/> description</p> <p><input checked="" type="checkbox"/> location</p> <p><input checked="" type="checkbox"/> assetnum</p> <p><input checked="" type="checkbox"/> reportdate</p> <p><input checked="" type="checkbox"/> status</p> <p><input checked="" type="checkbox"/> statusdate</p> <p><input checked="" type="checkbox"/> targcompdate</p>

Work Queue Reminders

- A work queue is a list of work orders
- No hyperlink to individual records (until MAS 9)
- Change status to 1 or more records is available
 - Be careful here with what you allow

IBM Maximo Application Suite | Manage

Work queues / CreateWorkQueue

Create work queue

1. Define work queue 2. Define query 3. Add actions
Optional

Select actions to be applied to query items

Available actions	Selected actions
<input type="text" value="Search"/>	
2 items selected Clear changes	
<input type="checkbox"/> 1025	
<input type="checkbox"/> MFMAILSENDWOM	
<input type="checkbox"/> MFMAILSENDWOMAG	
<input type="checkbox"/> WO APPR	
<input type="checkbox"/> WO CANCEL	
<input type="checkbox"/> WO CLOSE	
<input checked="" type="checkbox"/> WO COMP	<input checked="" type="checkbox"/> WO INPRG <input type="button" value="X"/>
<input checked="" type="checkbox"/> WO INPRG	<input checked="" type="checkbox"/> WO COMP <input type="button" value="X"/>
<input type="checkbox"/> WO WAPPR	

Work queues

✓ **Success!**
Work queue OPEN WORK WHERE I AM LEAD has been created.

Results: 2

Work queue name	Description	Priority	Count	State
OPEN BOILER WORK	Open Work on Boiler Hierarc...	3	156	Active
OPEN WORK WHERE I AM LE...	APPR and INPRG work order...	2	3	Active

Items per page: 10

1-2 of 2 items

1 of 1 pages

Work queues

Work Queue subtitle

Queue Name	Description	Count	Priority
OPEN BOILER WO...	Open Work on Boil...	156	3
OPEN WORK WHE...	APPR and INPRG ...	3	2

Work queues

Work Queue subtitle

Queue Name	Description	Count	Priority
OPEN BOILER WO...	Open Work on Boil...	156	3
OPEN WORK WHE...	APPR and INPRG ...	5	2

OPEN WORK WHERE I AM LEAD

1-2 of 2 items

1 of 1 pages

1-2 of 2 items

1 of 1 pages

Future Items of Note

- WO Intelligence – Problem Code Recommendation with WatsonX
 - Are you confident in your Failure Classifications
- Third Party Card on Operational Dashboard
 - Bring in Maximo data presentation from third party tool

WO Intelligence Problem Code Recommendations using watsonx

New GenAI feature recommends problem codes to assist with existing challenges faced by customers to address poor quality (or missing) work order data, impacting effective maintenance prioritization decisions as well as time spent on review and approval.

- AI model trained using long and short descriptions from a small set of related work orders
- Work Orders displays the AI recommendations for review/accept
 - Uses new IBM AI Design UI elements incorporated into Graphite
 - Provides confidence score of the predictions
- Work Queue surfaces the top AI recommendation to accept

The screenshot shows a 'Work orders /' page with a 'Summary' section. The description is 'Compressor pump vibrations at high operational load'. A modal window titled 'Select problem code' is open, displaying a table of recommendations:

Problem code	Description	Confidence
<input checked="" type="radio"/> AI HIGHPRES	High pressure	60%
<input type="radio"/> AI LEAK	Leaking	55%
<input type="radio"/> AI LOWPRES	Low pressure	50%
<input type="radio"/> LOWVOL	Low volume	
<input type="radio"/> STOPPED	Stopped	

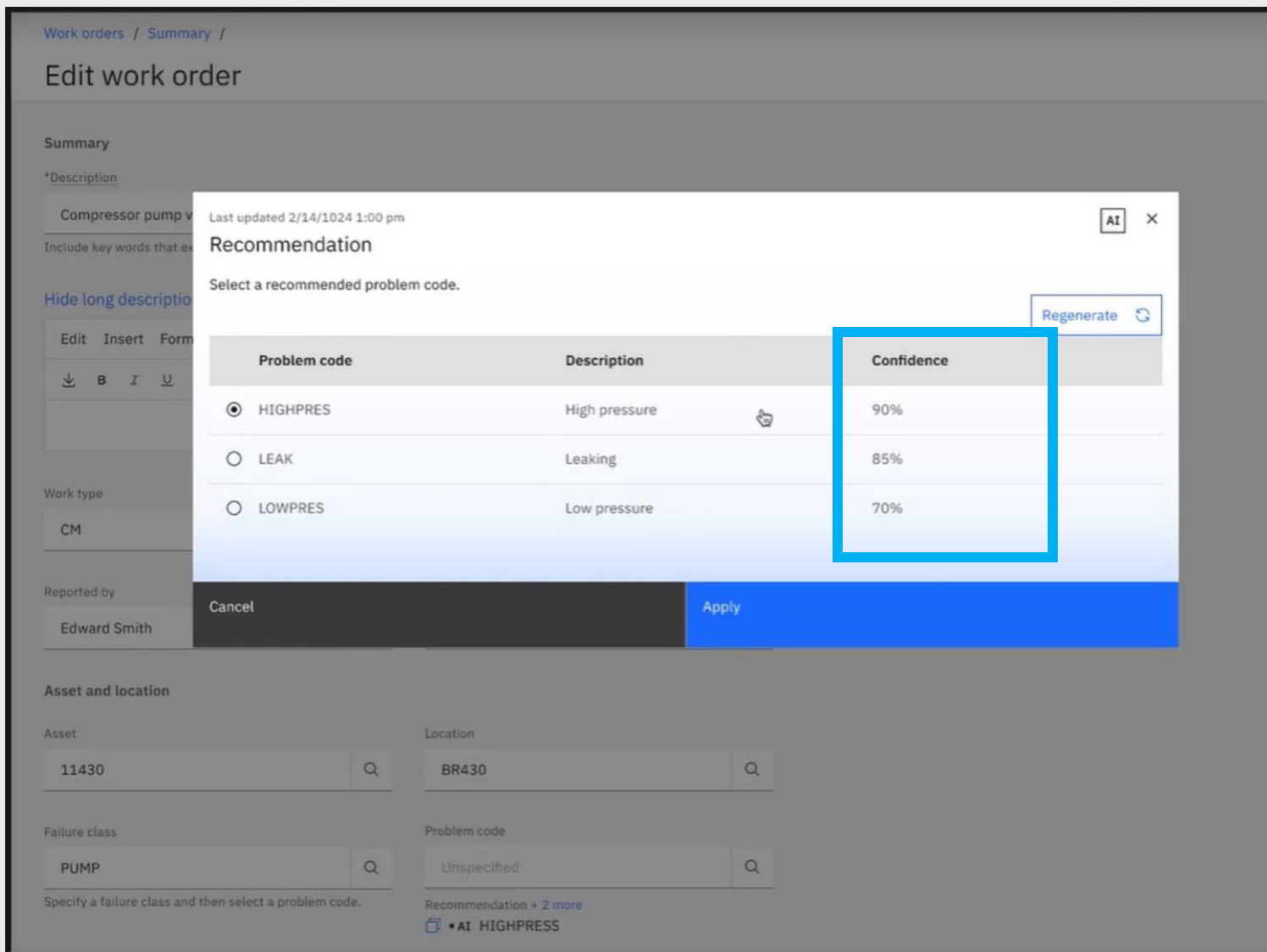
Below the table, there are controls for 'Items per page' (set to 10) and '1 - 5 of 5 items'. The modal has 'Cancel' and 'OK' buttons. In the background form, the 'Problem code' field is highlighted with a red box and contains the value 'HIGHPRES' with an 'AI' icon and a search icon.

Work Order Intelligence

AI model trained on customer data.

Suggests top 3 failure code inferences based on work orders textual data on desc, long desc, log, tasks.

Automated deployment and learning on new Manage objects and data structures, communicating with watsonx through a local broker.



The screenshot shows a web application interface for editing a work order. A modal window titled "Recommendation" is open, displaying a table of suggested problem codes. The table has three columns: "Problem code", "Description", and "Confidence". The "Confidence" column is highlighted with a red box. The table lists three options: "HIGHPRES" (90% confidence), "LEAK" (85% confidence), and "LOWPRES" (70% confidence). The "HIGHPRES" option is selected with a radio button. The modal also includes a "Regenerate" button and "Cancel" and "Apply" buttons at the bottom.

Problem code	Description	Confidence
<input checked="" type="radio"/> HIGHPRES	High pressure	90%
<input type="radio"/> LEAK	Leaking	85%
<input type="radio"/> LOWPRES	Low pressure	70%

Third Party Card

- Bring external presentation into Maximo



PM Performance
 Under target by 36.95
58.05 %
 0.00% from last refresh

Health of Assets for PM Work
 Under target by 90.00
0 %
 0% from last refresh

Workflow assignments due soon

Assignment	Due Date
No data	

External Content

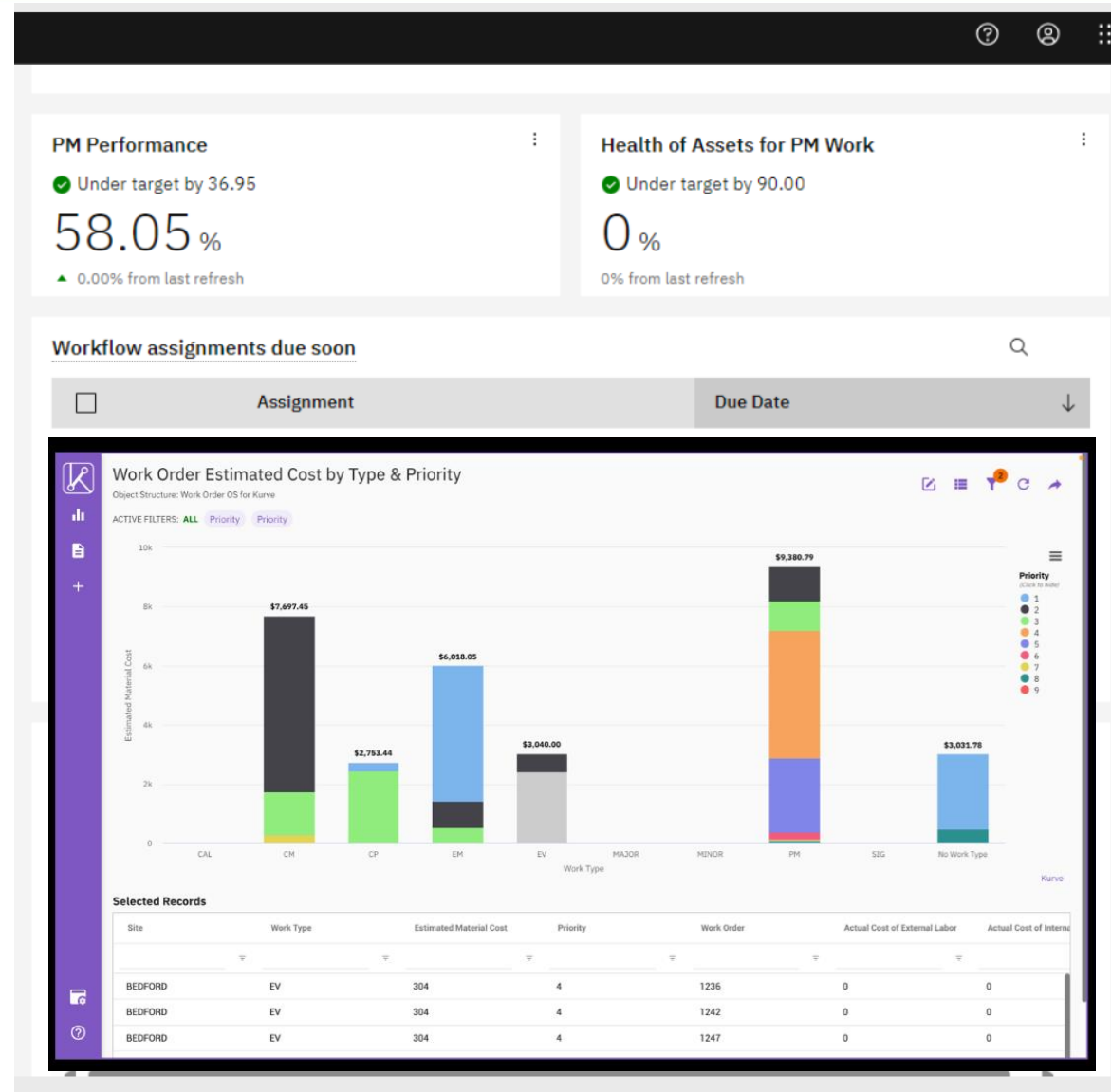
[< Back To Online Calculator](#)

[Super Fullscreen](#)

You are outside the CCPA jurisdiction.

Third Party Card

- Bring external presentation into Maximo
- Needs to be an embeddable url
- This is Kurve as an example



Useful Links

- Maximo Application Suite Product Update Group -
<https://community.ibm.com/community/user/asset-facilities/communities/community-home?communitykey=dab5c972-9121-44bc-83f7-018f06e3e628>
- How to join the MAS Product Update Group -
<https://community.ibm.com/community/user/asset-facilities/blogs/kim-woodbury1/2024/06/17/join-the-ibm-maximo-product-updates-group-today>
- Substitution Variables – useful still, for Work Queues
<https://tinyurl.com/SubstitutionVariables>
- Maximo Secrets – Operational Dashboard -
<https://maximosecrets.com/2024/03/01/operational-dashboard/>



QUESTIONS?