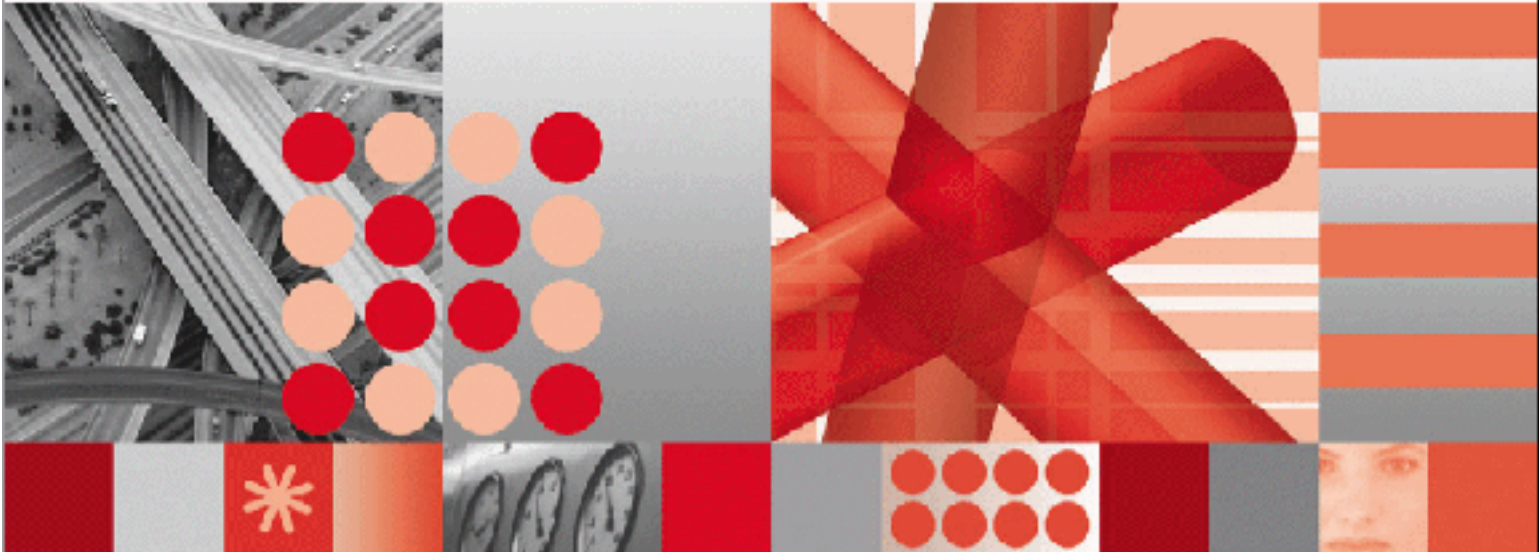




Version 6 Release 2.2 Fix Pack



User's Guide

Note

Before using this information and the product it supports, read the information in “Notices” on page Notices-33.

This edition applies to version 6, release 2.2 Fix Pack of Maximo Adapter for Primavera and to all subsequent releases and modifications until otherwise indicated in new editions.

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About This Publication

This section explains how this guide can help you to use IBM[®] Maximo[®] Primavera Adapter 6.2.2 Fix Pack. It also provides information about other IBM Corporation resources available to you, such as additional documentation and support.

Intended Audience

This guide is designed for users who use IBM Maximo Adapter for Primavera 6.2.2 Fix Pack.

Related Information

For more information about IBM Maximo Adapter for Primavera, refer to the following documentation:

| Document | Description |
|---|---|
| <i>IBM Maximo Adapter for Primavera 6.2.2 Fix Pack Installation Guide</i> | Describes how to install IBM Maximo Adapter for Primavera 6.2.2 Fix Pack. |
| <i>IBM Maximo Adapter for Primavera Release 2 Installation Guide</i> | Describes how to install IBM Maximo Adapter for Primavera. |
| <i>IBM Maximo Adapter for Primavera Release 2 User's Guide</i> | Describes how to use the Maximo Primavera Adapter. |

IBM Support

IBM Software Support provides assistance with product defects.

Before contacting IBM Software Support, your company must have an active IBM software maintenance contract, and you must be authorized to submit problems to IBM. For information about the types of maintenance contracts available, see "Enhanced Support," in the *Software Support Handbook* at techsupport.services.ibm.com/guides/services.html.

Complete the following steps to contact IBM Software Support with a problem:

- 1 Define the problem, gather background information, and determine the severity of the problem. For help, see "Contacting IBM" in the *Software Support Handbook* at techsupport.services.ibm.com/guides/beforecontacting.html.

- 2 Gather diagnostic information.
- 3 Submit your problem to IBM Software Support in one of the following ways:
 - a Online: Click the **Report problems** tab on the IBM Software Support site: www.ibm.com/software/support/probsub.html.
 - b By telephone: For the telephone number to call in your country, go to the Contacts page of the *Software Support Handbook*: techsupport.services.ibm.com/guides/contacts.html.

If the problem you submit is for a software defect or for missing or inaccurate documentation, IBM Support creates an Authorized Program Analysis Report (APAR). The APAR describes the problem in detail. Whenever possible, IBM Support provides a workaround that you can implement until the APAR is resolved and a fix is delivered. IBM publishes resolved APARs on the IBM Support web site daily, so that other users who experience the same problem can benefit from the same resolution.

Introducing the IBM Maximo Adapter for Primavera 6.2.2 Fix Pack

1

Overview

The IBM Maximo Adapter for Primavera allows work orders and their associated tasks and PMs created within Maximo to be scheduled within the Primavera Enterprise Project Manager application (Primavera), employing its capabilities for schedule analysis. The adapter also updates information on Maximo work orders and tasks from Primavera schedules.

Changes in the Fix Pack include screen changes and processing changes.

This document only covers the changes for the 6.2.2 Fix Pack. Use this document with the *IBM Maximo Adapter for Primavera Release 2 User's Guide*.

Changes

The following table contains the changes in the 6.2.2 Fix Pack.

| Application | Description |
|---------------------|--|
| Work Order Tracking | Export options were moved from the labor level to the project level. |
| Work Order Tracking | Anyone within the group specified on the project can update projects within Maximo. |
| Work Order Tracking | Actual labor costs and estimated and actual material, tools, and services costs can now be transferred to Primavera. |
| Work Order Tracking | Selected work orders can now be created in Primavera as separate projects or as one project. |
| Work Order Tracking | There is more user control over updated data transferred between Maximo and Primavera for existing projects. |
| Work Order Tracking | Primavera activity detail fields can now be specified at the work plan level as well as the work order level. |
| Work Order Tracking | Calculate remaining units from reported actual hours? option added to Primavera tab |
| Work Order Tracking | A dialog box displays when the export completes and indicates any errors. |

Changes

| Application | Description |
|---------------------|---|
| Work Order Tracking | Exception tab added to Primavera tab to display export errors. |
| Job Plans | Primavera activity detail fields can now be specified at the job plan level. |
| Crafts | Crafts can now be individually selected for transfer to Primavera or deleted from Primavera through the Crafts application. |
| Organizations | A screen was created to define custom mapping at the site level. |
| Organizations | Purchase constraints can be defined from purchase requisitions and/or purchase orders. |
| Labor | The Primavera instance as defined by the fields in the Primavera Connection Details table window in the Labor application can be changed and all resources for the new instance are exported. Data from previous instances is maintained so you can change back to previous instances or have multiple users assigned to different instances. |

Work Order Tracking Application Modifications

2

Overview

The Export and Projects tabs in the Primavera tab in the Work Order Tracking application have been redesigned to accommodate new export and import options.

You now have a choice as to where you want to specify the Primavera activity detail information: at the work order level and have the information cascade to all work order plan tasks belonging to the work order; or at the work order plan task level so you can specify each task's particular attributes.

Crafts can be transferred to Primavera and created as resource records in two ways: attached to a work order or task in the work plan labor tab or through the Transfer Crafts to Primavera option on the List tab in the Crafts application (for details on the Transfer Crafts to Primavera option, see "List Tab," on page 28.).

Export Tab

The following changes were made to the Export tab.

Export options previously on the Primavera tab in the Labor application are now in the Export tab in the Work Order Tracking application. The options are now at the project level instead of the labor level. The options are no longer tied to the user who created the project.

Anyone within a given group can now update projects within Maximo. Previously, only the project owner could update or delete projects they created.

Actual labor costs, estimate and actual material, tools, and services costs can now be transferred from Maximo to Primavera at the work order level (summarized costs) or at the work order and task level (detailed costs). Estimate labor costs are not part of this enhancement because they are part of the record through the labor assignments.

Selected work orders can now be created in Primavera as separate projects or as one project. If you choose to create separate projects, the work order number, description, and the transfer date is used to generate the project information. If you choose to create one project, you specify the project name, description and/or planned start date.

The Refresh EPS functionality now creates expense categories and activity codes in Primavera. The expense categories capture expense costs transferred from

Export Tab

Maximo. The expense categories created in Primavera are Maximo Materials, Maximo Services, and Maximo Tools. Work Order Priority and Asset/Location Priority from Maximo become activity codes in Primavera.

A dialog box displays on the Export tab when the export completes and indicates any errors.

Primavera EPS Detail Window

The screenshot shows the 'Primavera EPS Detail' window. At the top, there are four tabs: 'OBS Name' (Commercial), 'EPS Name' (Commercial, Manufacturing & Distribution), 'Created By' (WILSON), and 'Group'. Below the tabs, the window is divided into several sections. On the left, there are five checkboxes: 'Work orders export to activities?' (unchecked), 'Import new activities from Primavera?' (unchecked), 'Include Primavera logic on import?' (unchecked), 'Exclude work order hierarchy?' (unchecked), and 'Allocate new Worum automatically?' (unchecked). Below these is a checkbox for 'Calculate remaining units from reported actual hours?' (unchecked). In the center, there is a text box labeled 'SQL Where clause to filter child WOs and tasks'. On the right, there is a section titled 'Specify cost transfer method...' with three radio buttons: 'Transfer No Costs' (selected), 'Transfer Summarized Work Order Costs' (unchecked), and 'Transfer Detail Work Order and Task Costs' (unchecked). Below this is a checkbox for 'Transfer Detail Labor Transactions?' (unchecked). At the bottom, there are two main sections: 'Export selected work orders to Individual project:' and 'Create new Primavera Project for selected work orders:'. The first section lists three bullet points: '- Project name will be selected work order ID', '- Project description will be work order description', and '- Project planned start date will be date of transfer'. The second section has three input fields: 'Project Name', 'Project Description', and 'Planned start Date'. At the bottom right, there is a 'Refresh EPS' button.

The following new attributes display on the Primavera EPS Detail table window of the Export tab of the Primavera tab in the Work Order Tracking application.

Group - Optional

Anyone in the group specified can update the selected project. Click Detail Menu to display a list of valid values.

Work orders export to activities? - Optional

If selected, all work orders and tasks are created as activities in Primavera; no WBS structure is created. As a result, milestones are not generated in Primavera.

Import new activities from Primavera? - Optional

If selected, new activities created in Primavera are transferred as task work orders to Maximo.

Include Primavera logic on import? - Optional

If selected, activity logic in Primavera is transferred to task work orders in Maximo.

Exclude work order hierarchy? - Optional

If selected, child work orders are not included in the export to Primavera unless they satisfy the query condition.

Allocate New Wonum automatically? - Optional

If selected, work order numbers are generated for new task work orders imported into Maximo.

Calculate remaining units from reported actual hours? - Optional

If selected, actual labor hours are used to calculate labor remaining units and labor remaining units/time.

SQL Where clause to filter child WOs and tasks - Optional

If completed, the where clause is used to determine the child work orders and tasks to include with the work orders selected for transfer. An example of how this field is used is to exclude canceled child work orders. Any valid field of a work order can be used in the where clause as well as standard SQL logical operations.

Specify cost transfer method - Select one option

Determines whether costs are transferred from Maximo to Primavera and the level of detail of the costs.

Transfer No Costs

If selected, no costs are transferred. This is the default option.

Transfer Summarized Work Order Costs

If selected, summarized work order costs are transferred.

Transfer Detailed Work Order and Task Costs

If selected, detailed work order and task costs are transferred.

Transfer Detail Labor Transactions? - Optional

If selected, detailed actual labor hours are transferred from Maximo to Primavera.

To enable this option, the Transfer Detailed Work Order and Task Costs cost transfer method must be selected and the Exclude Labor from Primavera Resource Pool option on the Primavera tab in the Labor application must be empty.

The following new buttons display on the Primavera EPS Detail table window of the Export tab of the Primavera tab in the Work Order Tracking application.

Work Order Export

This button creates a new project in Primavera for each work order in the query result set. The work order ID and description is used as the project's name and description. The transfer date is used as the planned start date for each project.

Project Export

This button creates a new project in Primavera that includes all work orders in the query result set. The following attributes support the Project Export function.

Project Name - Required

Enter a name for the project.

Project Description - Required

Enter a description for the project.

Planned start Date - Optional

Enter a date when the project is planned to start. If not completed, the transfer date (current date) is used as the planned start date on the project.

Projects Tab

The Projects tab contains options that give you more control over updated data transferred between Primavera and Maximo. You control the information updated on work orders and tasks in Maximo including costs. You control the information updated on projects in Primavera, including appending new work orders and tasks. You can also overwrite projects and delete projects in both Primavera and Maximo.

Exported Project Detail Window

The screenshot shows the 'Exported Project Detail' window with the following fields and options:

- Project:** 11161
- Project Desc:** 11161
- OBS Name:** Hydra Corporation
- EPS Name:** Eric
- Created:** 6/4/08 10:01 AM
- Updated:** 6/4/08 10:01 AM
- Created by:** WILSON
- Group:** (empty)

Update Work Order/Task Options:

- Update Cost only
- Update All
- Update all except...
- WO/Task Description?
- Activity Detail Data?
- Progress Data?
- Cost Data?
- Logic Data?
- Append on Update?

Import Work Order Options:

- Import Primavera Logic Between WO Tasks?
- Import Primavera Activities As New WO Tasks?
- Allocate New Wonum Automatically?
- Import Scheduled Dates on Started WO/Tasks?

Modify Project:

- Append:** Append New WO and Tasks to Project
- Overwrite:** Overwrite/Replace project in Primavera with selected WO/Tasks
- Delete:** Delete project in Maximo and Primavera

The following new attributes and buttons display on the Exported Project Detail table window of the Projects tab of the Primavera tab in the Work Order Tracking application.

Update Work Order/Task Options - Select one option

Determines the Maximo information that is transferred to the selected project.

Update Cost only

If selected, only costs associated with the work orders and tasks that comprise the Primavera project are updated.

Update All

If selected, all data associated with any of the project's work orders and tasks that have been modified in Maximo will be updated in Primavera. Records not modified in Maximo since the last update will not be updated in Primavera. This is the default option.

Update all except...**WO/Task Description?**

If selected, the work order and task descriptions are not transferred to Primavera.

Activity Detail Data?

If selected, the following information is not transferred to Primavera.

- ▼ activity type
- ▼ duration type
- ▼ percent type
- ▼ constraint type
- ▼ constraint date

Progress Data?

If selected, the following information is not transferred to Primavera.

- ▼ actual start/finish dates
- ▼ percent complete
- ▼ remaining duration

Cost Data?

If selected, the cost data is not transferred in Primavera.

Logic Data?

If selected, the logic between tasks is not transferred in Primavera.

Append on Update?

If selected, any new work orders and tasks in the query result set are transferred to the WBS in Primavera when you click the Update button.

Update button

This button updates the selected project in Primavera with information from Maximo based on the selected options.

Import Work Order Options - All options are optional

Determines the Primavera information that is transferred into Maximo.

Import Primavera Logic Between WO Tasks?

If selected, activity logic is transferred to work order tasks in Maximo.

Import Primavera Activities As New WO Tasks?

If selected, new activities are transferred to Maximo as new work order tasks.

Allocate New Wonum Automatically?

If selected, work order numbers are generated for new task work orders transferred Maximo.

Import Scheduled Dates on Started WO/Tasks?

If selected, scheduled dates are transferred to Maximo regardless of whether the work order/tasks are started in Primavera.

Import button

This button imports the selected project from Primavera to Maximo with information based on the selected options.

Modify Project

This section lets you append, overwrite, or delete projects.

Append button

This button appends the selected or queried work orders and tasks into the existing hierarchy of the selected project. An error occurs during the transfer if any of the selected work orders are already in the selected project in Primavera.

Overwrite button

This button replaces the project in Primavera with the selected work orders and tasks.

Delete button

This button deletes the project in both Maximo and Primavera.

Exception Tab

Exception tab is added to Primavera tab to display export errors.

Exception Tab

| Project Name | Work Order Number | PV Exception | Create By |
|--------------|-------------------|---|-----------|
| 1 1172 | T1046 | Errors located:ConstraintType: When P... | WILSON |
| 1 1172 | T1045 | Errors located:RemainingFinish: Remaining FL... | WILSON |

| | | | |
|----------------------------|--|-------------------------|---|
| Primavera Exception | Errors located:ConstraintType: When Primary constraint is 'As Late As Possible', no primary constraint date can be set | Maximo Exception | The constraint is 'As Late As Possible',no primary constraint date can be set |
| Created Date | 7/14/08 11:02 AM | Created By | WILSON |

The following read only attributes display on the Exception tab of the Primavera tab in the Work Order Tracking application.

Primavera Exception

The error from the Primavera API.

Maximo Exception

The translation of the Primavera Exception.

Created Date

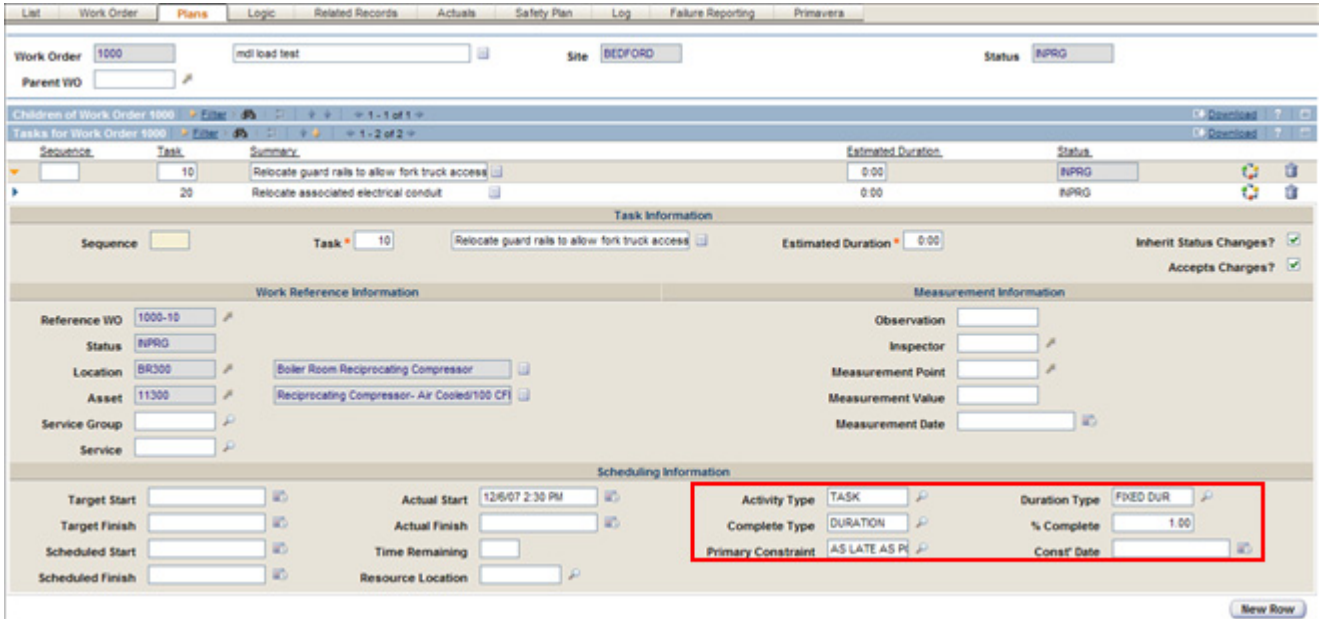
The date and time the error was encountered during the transfer.

Created By

The user who performed the transfer.

Work Plan Tasks

Primavera activity detail attributes are now available in the Scheduling Information section of the Work Plan Task Details screen in the Plans tab of the Work Order Tracking application.



Activity detail information specified at the task level is transferred to Primavera. If no activity detail information is specified at the task level the activity detail information specified at the work order level is transferred to Primavera. If activity detail information is not specified at the task or work order level, the default values of the attributes are transferred to Primavera.

Activity detail information is imported from Primavera to the associated tasks and work orders in Maximo. A work order and its tasks can have different activity information.

The following new attributes display on the Scheduling Information table window for the selected task on the Plan tab in the Work Order Tracking application.

Activity Type - Optional

The type of activity the work order record is translated to in Primavera Enterprise Project Manager. Click Select Value to display a list of valid values.

Complete Type - Optional

Indicates how to calculate an activity's completion percentage. Click Select Value to display a list of valid values.

Primary Constraint - Optional

Determines when the work order/activity starts or finishes. Click Select Value to display a list of valid values.

Duration Type - Optional

Indicates whether resources, the schedule, or costs are most important when activities are updated in a project. Click Select Value to display a list of valid values.

% Complete - Optional

The percentage of the work order that is complete. The value comes from Primavera when the project is transferred to Maximo.

Const' Date - Optional

The earliest date a work order/activity can start or finish, based on the Primary Constraint value.

Transferring Crafts on Work Orders and Tasks

The resource records created in Primavera depend on if the Schedule by Work Location? check box is selected or not. The Schedule by Work Location? check box is accessed through Organization > List tab > Select Action menu > Primavera Options > System Options. You must have security granted to access the option.

If a resource record exists in Primavera for a craft being transferred, the resource record is updated.

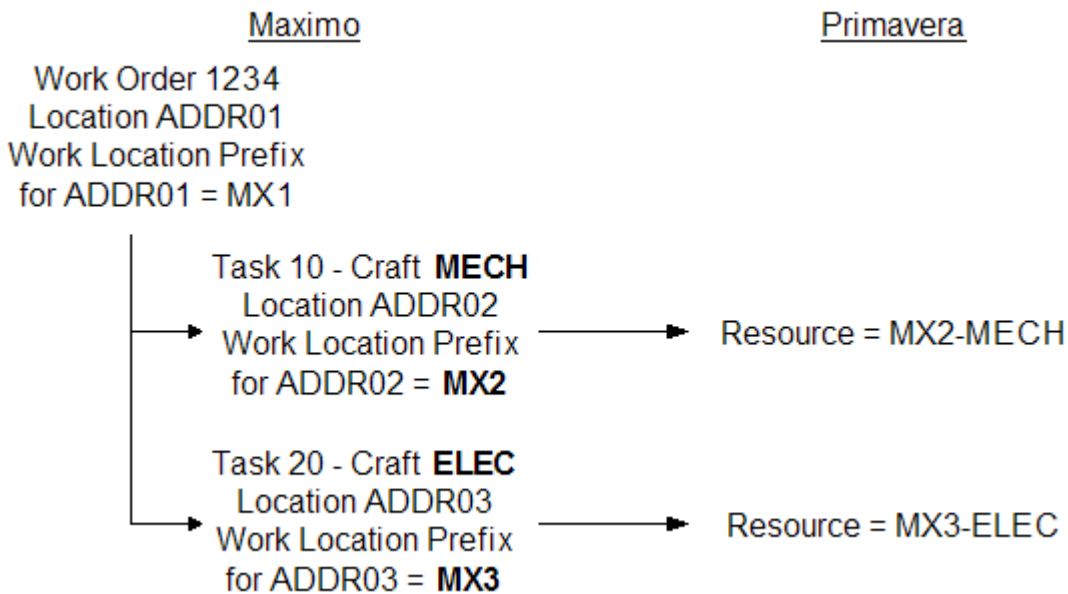
If the Schedule by Work Location? check box is not selected, a resource record is created in Primavera for the craft record specified on the work order or task. The craft standard rate is included on the resource record. In a multi-organization environment where duplicate crafts with different standard rates could exist, only the first craft record is transferred to Primavera.

If the Schedule by Work Location? check box is selected, the location specified on the task is checked for a work location prefix value. If a prefix exists, it is appended to the beginning of the craft to create a resource record in Primavera. If the task location does not have a work location prefix, the parent's location is checked for a work location prefix. If it has a work location prefix, the work location of the parent's location is appended to the craft specified on the task to create the resource record. The craft standard rate is included on the resource record.

Example

This example shows all locations with a work location prefix.

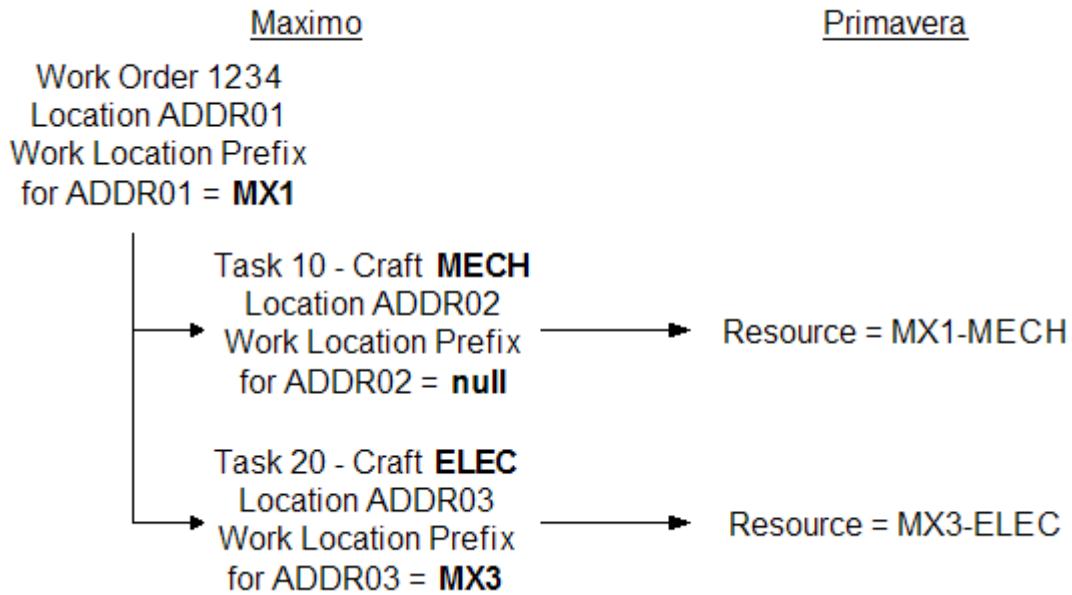
The work location prefix of the location specified on the task record is appended to the craft specified for that task to create the resource record in Primavera.



Example

This example shows one location without a work location prefix.

This example shows the location ADDR02 does not have a work location prefix. The work location prefix of the location specified on the parent record is appended to the craft specified for the task to create the resource record in Primavera.



3

Job Plans Application Modifications

Overview

Primavera activity detail information can now be specified at the job plan task level so you can specify each task's particular attributes and have them carried to work plan task records.

Job Plan Tasks

Primavera activity detail attributes are available in the Details section of the Job Plan Task Details section in the Job Plan tab of the Job Plans application.

| Sequence | Task | Description | Duration | Meter |
|----------|------|---------------------------------------|----------|-------|
| 20 | | INSPECT DRIVE MOTOR AND MOUNTS | 0:00 | |
| 30 | | CLEAN MOTOR | 0:00 | |
| 40 | | INSPECT GEAR REDUCER UNIT, CHECK GEAR | 0:00 | |

| | | | | | | | |
|--------------|---------|----------|------|--------------------|-------------|-------------------|-----------|
| Organization | EAGLENA | Duration | 0:00 | Activity Type | TASK | Duration Type | FIXED DUR |
| Site | BEDFORD | Meter | | Complete Type | PHYSICAL | Resource Location | |
| Task | 90 | | | Primary Constraint | START ON OR | | |
| Sequence | | | | | | | |

The following new attributes display on the Details table window for the selected task on the Job Plan tab in the Job Plans application.

Activity Type - Optional

The type of activity the work order record is translated to in Primavera Enterprise Project Manager. Click Select Value to display a list of valid values.

Complete Type - Optional

Indicates how to calculate an activity's completion percentage. Click Select Value to display a list of valid values.

Primary Constraint - Optional

Determines when the work order/activity starts or finishes. Click Select Value to display a list of valid values.

Duration Type - Optional

Indicates whether resources, the schedule, or costs are most important when activities are updated in a project. Click Select Value to display a list of valid values.

Resource Location - Optional

Identifies the location of resources doing the work. Click Select Value to display a list of valid values.

4

Purchasing Modifications

Overview

You can control how purchase constraints are defined and managed. Purchase requisitions and purchase orders can now be used to create purchase constraints.

Two activities are created for each purchase requisition line item or purchase order line item that references a work order task: a zero duration activity and an activity related to the work order task. A finish-start logic relationship is created from the zero duration activity to the activity related to the work order task. The zero duration activity is the constraint on the work order task activity.

Example

In Maximo, purchase order 1001 references work order task 1000-10. When the information is exported to Primavera, two activities are created with a finish-start logic relationship. Activity 1001, the zero duration activity must finish before activity 1000-10 can start.

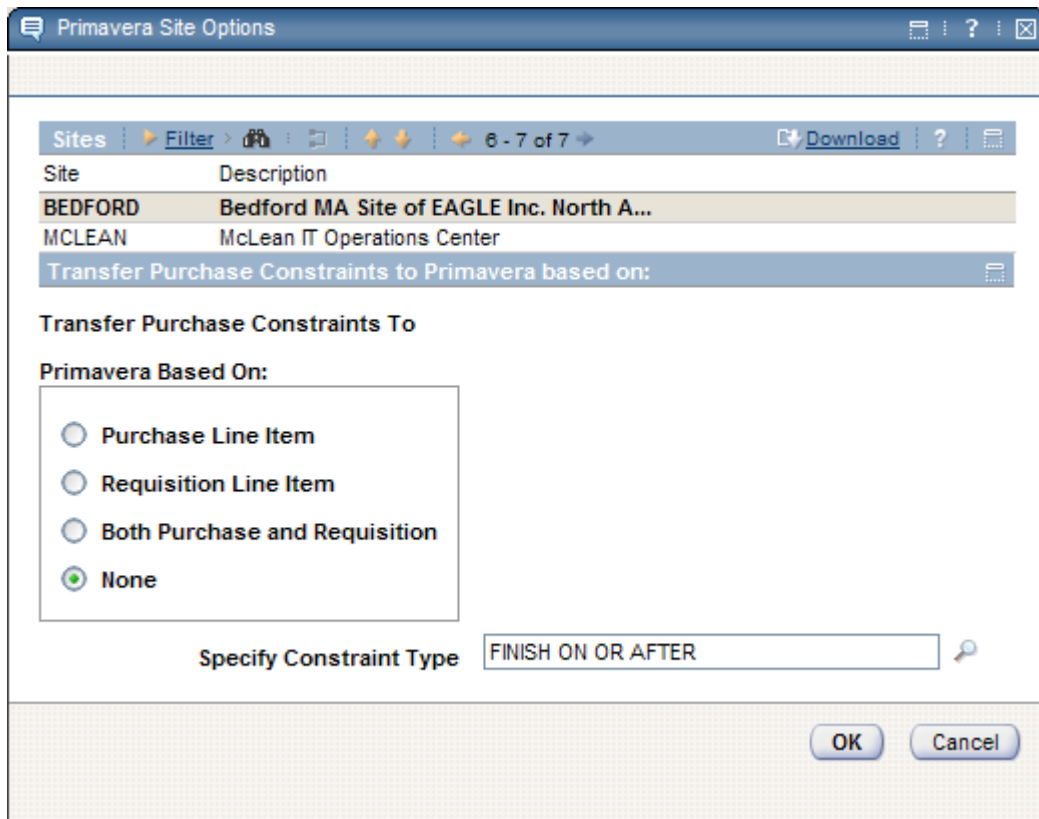
The Vendor Date on the line item is used as the constraint date in Primavera. If there is no Vendor Date value, the Required Date is used. If there is no value in either field, no date is specified on the purchase constraint activity in Primavera. Updates of the Vendor Date or Required Date in Maximo updates the constraint date on the purchase constraint activity in Primavera.

Purchase constraint activities are not transferred to Maximo as tasks.

Primavera Site Options

The options are defined in the Primavera Site Options dialog box under the Select Action menu in the Organization application. The options apply to the site highlighted at the top of the dialog box.

NOTE Access must be granted to the Primavera Site Options for the appropriate group(s) before you can define purchase constraints.



The following options are available on the Primavera Site Options dialog box.

Transfer Purchase Constraints To Primavera Based On:

One option must be selected in this section.

Purchase Line Item

If selected, purchase constraint activities are created in Primavera only when the purchase line item is tied to a work order task that is being transferred to Primavera.

Requisition Line Item

If selected, purchase constraint activities are created in Primavera only when the requisition line item is tied to a work order task that is being transferred to Primavera.

Both Purchase and Requisition

If selected, purchase constraint activities are created in Primavera when either the purchase line item or the requisition line item is tied to a work order task that is being transferred to Primavera.

None

If selected, no purchase constraint activities are created in Primavera. This is the default option.

Specify Constraint Type - Required

Determines when the activity starts or finishes. The default value is FINISH ON OR AFTER. Click Select Value to display a list of valid values.

5

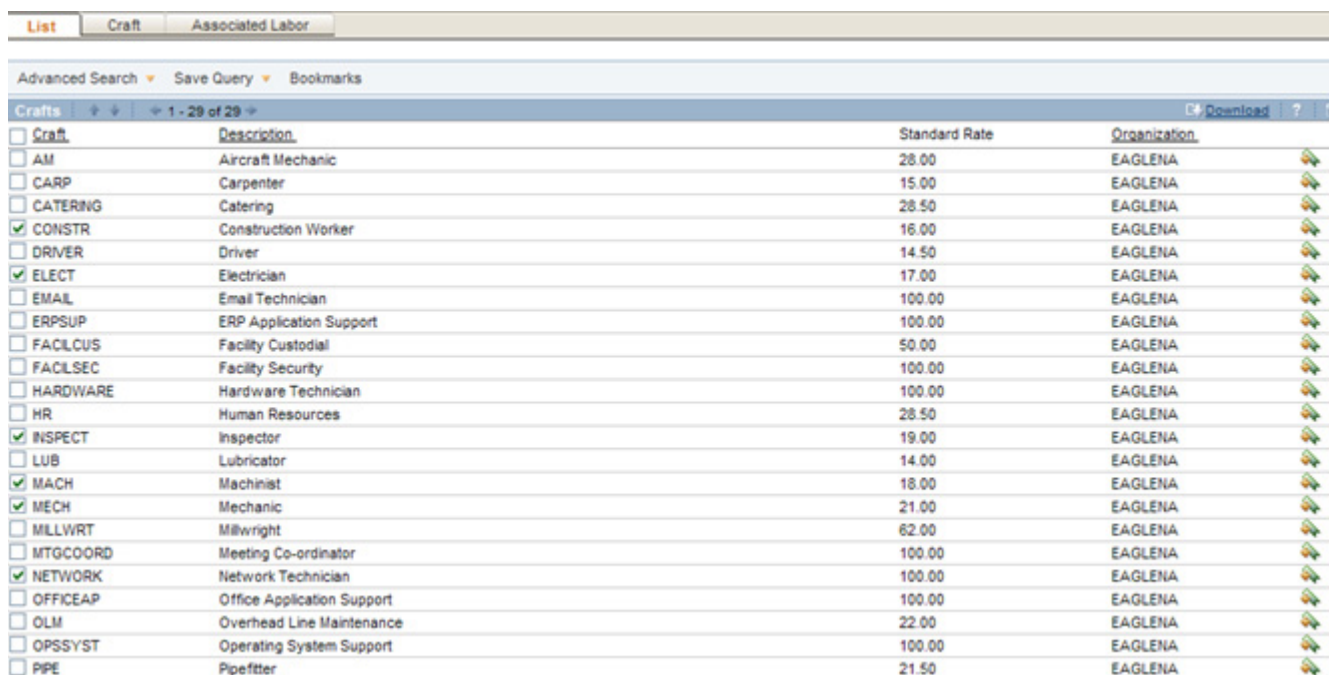
Craft Application Modifications

Overview

Craft records can now be selected for transfer to Primavera or deleted from Primavera through the Craft application. Crafts can also be transferred to Primavera by specifying a craft on the Work Plan Labor tab in the Work Order Tracking application. For details, see "Work Plan Tasks," on page 16.

List Tab

The List tab in the Craft application displays the queried records. You can select specific records from the displayed list by using the check boxes to the left.



| <input type="checkbox"/> | Craft | Description | Standard Rate | Organization | |
|-------------------------------------|----------|----------------------------|---------------|--------------|--|
| <input type="checkbox"/> | AM | Aircraft Mechanic | 28.00 | EAGLENA | |
| <input type="checkbox"/> | CARP | Carpenter | 15.00 | EAGLENA | |
| <input type="checkbox"/> | CATERING | Catering | 28.50 | EAGLENA | |
| <input checked="" type="checkbox"/> | CONSTR | Construction Worker | 16.00 | EAGLENA | |
| <input type="checkbox"/> | DRIVER | Driver | 14.50 | EAGLENA | |
| <input checked="" type="checkbox"/> | ELECT | Electrician | 17.00 | EAGLENA | |
| <input type="checkbox"/> | EMAIL | Email Technician | 100.00 | EAGLENA | |
| <input type="checkbox"/> | ERPSUP | ERP Application Support | 100.00 | EAGLENA | |
| <input type="checkbox"/> | FACILCUS | Facility Custodial | 50.00 | EAGLENA | |
| <input type="checkbox"/> | FACILSEC | Facility Security | 100.00 | EAGLENA | |
| <input type="checkbox"/> | HARDWARE | Hardware Technician | 100.00 | EAGLENA | |
| <input type="checkbox"/> | HR | Human Resources | 28.50 | EAGLENA | |
| <input checked="" type="checkbox"/> | INSPECT | Inspector | 19.00 | EAGLENA | |
| <input type="checkbox"/> | LUB | Lubricator | 14.00 | EAGLENA | |
| <input checked="" type="checkbox"/> | MACH | Machinist | 18.00 | EAGLENA | |
| <input checked="" type="checkbox"/> | MECH | Mechanic | 21.00 | EAGLENA | |
| <input type="checkbox"/> | MILLWRT | Millwright | 62.00 | EAGLENA | |
| <input type="checkbox"/> | MTGCOORD | Meeting Co-ordinator | 100.00 | EAGLENA | |
| <input checked="" type="checkbox"/> | NETWORK | Network Technician | 100.00 | EAGLENA | |
| <input type="checkbox"/> | OFFICEAP | Office Application Support | 100.00 | EAGLENA | |
| <input type="checkbox"/> | OLM | Overhead Line Maintenance | 22.00 | EAGLENA | |
| <input type="checkbox"/> | OPSSYST | Operating System Support | 100.00 | EAGLENA | |
| <input type="checkbox"/> | PIPE | Pipefitter | 21.50 | EAGLENA | |

Transfer Crafts to Primavera

To transfer the selected crafts to Primavera, choose Transfer Crafts to Primavera from the Select Action menu.

If a resource record exists in Primavera for a craft being transferred, the resource record is updated.

Access the Schedule by Work Location? check box through Organization > List tab > Select Action menu > Primavera Options > System Options.

NOTE Access must be granted to Primavera Options and System Options for the appropriate group(s) before you can use the Schedule by Work Location? check box.

If the Schedule by Work Location? check box is not selected, a resource record is created in Primavera for each selected craft record. The craft standard rate is included on the resource record. In a multi-organization environment where duplicate crafts with different standard rates could exist, only the first craft record is transferred to Primavera.

If the Schedule by Work Location? check box is selected, the user's site ID is appended to the beginning of the selected crafts to become the resource name. If a Work Location Prefix value exists on location records belonging to the user's site, the prefix is appended to the beginning of the craft to create a resource record in Primavera. If a location does not have a work location prefix, no resource record is created since there is no prefix to add to the craft. The craft standard rate is included on the resource record.

Example

This example shows a work location prefix for all locations.

Schedule by Work Location? is selected for the organization.

| | |
|---------------------------------|---------|
| User's Site | BEDFORD |
| Locations under site BEDFORD | ADDR01 |
| | ADDR02 |
| | ADDR03 |
| Work Location Prefix for ADDR01 | MX1 |
| Work Location Prefix for ADDR02 | MX2 |
| Work Location Prefix for ADDR03 | MX3 |
| Craft | MECH |

The following are the resource records transferred to Primavera.

| |
|--------------|
| BEDFORD-MECH |
| MX1-MECH |
| MX2-MECH |
| MX3-MECH |

Example

This example shows one location without a work location prefix.

Schedule by Work Location? is selected for the organization.

| | |
|---------------------------------|---------|
| User's Site | BEDFORD |
| Locations under site BEDFORD | ADDR01 |
| | ADDR02 |
| | ADDR03 |
| Work Location Prefix for ADDR01 | MX1 |
| Work Location Prefix for ADDR02 | null |
| Work Location Prefix for ADDR03 | MX3 |
| Craft | MECH |

The following are the resource records transferred to Primavera.

| |
|--------------|
| BEDFORD-MECH |
| MX1-MECH |
| MX3-MECH |

Delete Craft Resources from Primavera

To delete the selected crafts from Primavera, choose Delete Craft Resources from Primavera from the Select Action menu.

The resource records are removed from Primavera, but the role records remain.

6

Custom Mapping Modifications

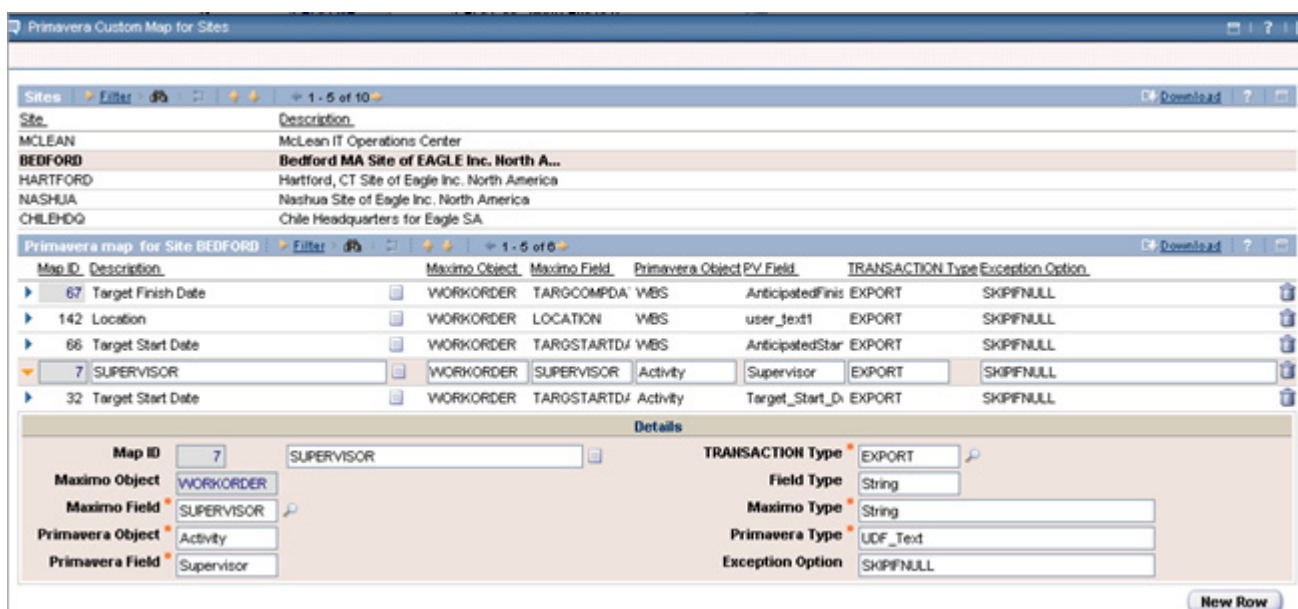
Overview

Custom mapping of additional data between Maximo and Primavera is now available through a dialog box at the site level in Maximo.

NOTE Access must be granted to the Primavera Custom Map for Sites for the appropriate group(s) before you can define custom maps.

Primavera Custom Map for Sites

Define custom mapping in the Primavera Custom Map for Sites dialog box under the Select Action menu in the Organization application (Go To > Administration > Organization). Retrieve the appropriate organization. The information applies to the sight highlighted at the top of the dialog box.



The following attributes display on the Primavera Custom map for Sites dialog box.

Map ID - System Generated

System generated unique ID for the object.

Description - Optional

The description of the object.

Maximo Object - Required

The object that contains the Maximo data you want transferred to Primavera., or the object where you want Primavera data transferred into Maximo. Value must be in uppercase.

Maximo Field - Required

The field that contains the Maximo data you want transferred to Primavera, or the field where you want Primavera data transferred into Maximo. Value must be in uppercase.

Primavera Object - Required

The object that contains the field you want transferred to/from Primavera. Value is case-sensitive as specified in the Primavera Java API documentation.

Primavera Field - Required

The field that contains the Primavera data you want transferred to Maximo, or the field where you want Maximo data transferred into Primavera. Value is case-sensitive as specified in the Primavera Java API documentation.

TRANSACTION Type - Required

The direction the data is being transferred regarding Maximo. Valid values are EXPORT or IMPORT.

Field Type - Optional

The data type of the value in Primavera. If you enter a value, it must be "String", "Double", "Integer", "Date", or "LITERAL". If the value is "String", "Double", "Integer", or "Date", any change to the related field in Maximo flags the record for update in Primavera. "LITERAL" is used to transfer a constant to the specified Primavera field.

Maximo Type - Required

The data type of the value in Maximo.

Primavera Type - Required

The data type of the value in Primavera.

Exception Option - Optional

What happens if an error occurs. You can leave the field empty or enter SKIPIFNUL.

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