

# Support Technical Exchange: Mobile Solutions for Maximo

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## Introduction

- IBM offers two different mobile solutions for use with Maximo
  - Maximo Mobile
  - Maximo Everyplace
  
- This presentation will describe each solution and what benefits each option offers
  
- It will also cover the Scheduler 7.5.1 Everyplace templates for field workers

# Maximo Mobile



# Maximo Mobile - Product Overview

## ■ Maximo Mobile

- Maximo Mobile is a suite of three mobile applications and 3 core side administrative applications
- Mobile applications (each separately purchasable)
  - Maximo Mobile Work Manager
  - Maximo Mobile Inventory Manager
  - Maximo Mobile Asset Manager
- Administrative applications (included when you purchase any of the mobile applications)
  - Mobile Data Manager
  - Mobile Error Manager
  - Security Groups (Mobile)
- Primarily intended for disconnected operations
  - Not web based like traditional Maximo or Maximo Everyplace.
  - Maximo Mobile applications are installed on your mobile device
  - Stores data in a local mobile database

# System Requirements

- **Mobile Device Requirements**
  - Processor running Windows Mobile Version 5.0, 6.0, 6.1, 6.5.1 operating system.
  - Minimum of 128MB of internal RAM or the use of flash memory of 128MB or greater. Older flash memory technology can be quite slow. If flash memory is used, the newest flash memory technology is highly recommended.
- **Laptop/Tablet Requirements**
  - Windows XP, Vista and 7 are also supported
- **General Communication Requirements**
  - In order for the mobile devices to communicate with Maximo, an environment that supports the HTTP protocol is required. This may be LAN, WLAN, Wi-Fi, cellular, satellite, GPRS, Active Sync(USB) or any communication medium that supports the HTTP protocol.

# Screen and Business Rule Configuration

- Configuration of Maximo Mobile is still the same as previous versions.
- There is no Application Designer available for the mobile applications at this time.
- Modifications must be made directly to the XML.
- The Mobile Configuration Guide offers a number of common configurations with examples. Please refer to this guide for details
- New Maximo Mobile Cookbook

## Data Configuration

- One of the most important steps during the implementation of Maximo Mobile is defining the data queries and settings that determine what data is downloaded to the mobile devices.
- There is always a possibility that clients could be downloading more data than they require. This needs to be avoided by understanding the use cases and tailoring the data queries to meet these needs.  
Examples:
  - If a client will not be taking any meter readings on their mobile devices, there is no need to download meters
  - If they will not be using the Send Communications function (e-mail from a work order), then there is no need to download e-mail addresses and communication templates.

## Deep Dive – Maximo Mobile 7.1

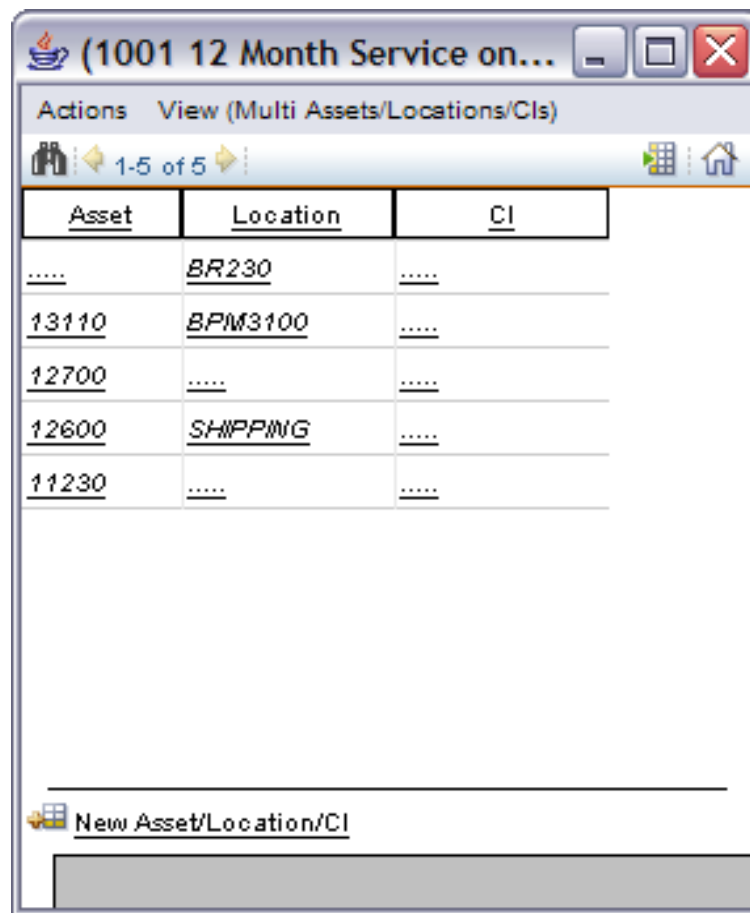
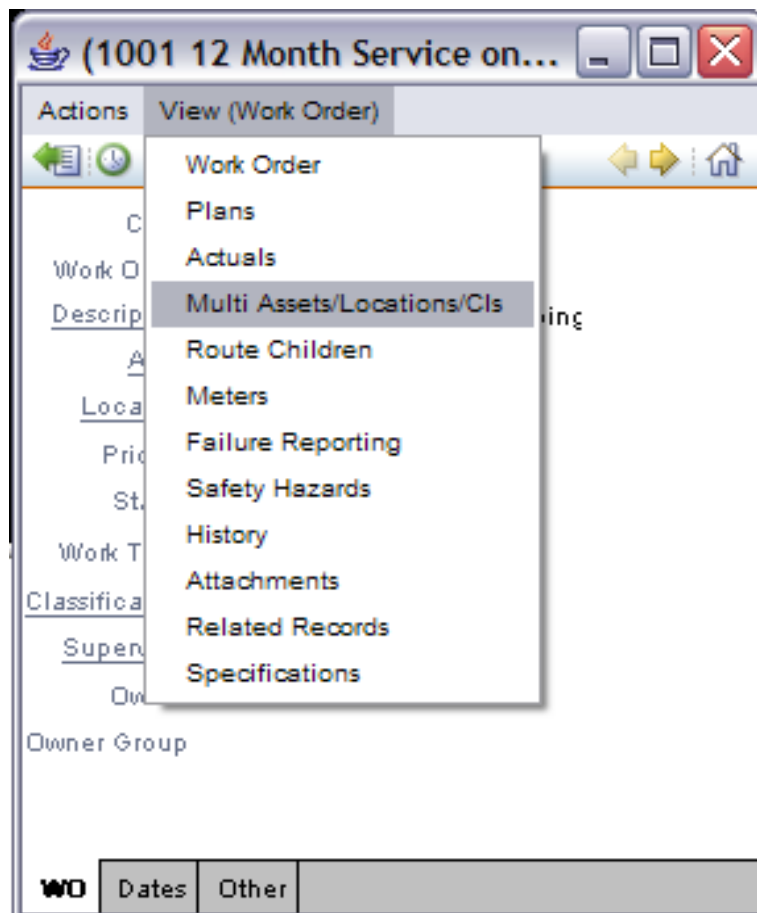
- Maximo Mobile 7.1 introduced the following features:
  - Multi Asset/Location table
  - Move/Swap/Modify Assets
  - Work Order and Ticket Classification Specifications
  - Item Status
  - Performance Improvements



## Multi Asset/Location/CI Table

- Core Maximo 7.1 introduced a new 'Multiple Asset, Location and Configuration Item table associated with Work Orders and Tickets of all classes.
- This new table allows for multiple assets to be defined on a single work order record.
- Distributing costs is not possible yet. This is a future enhancement
- A new View has been added to the Maximo Mobile Work Manager application to display this list of assets, locations and CIs.
- The existing actions available from the primary Asset, Location and CI fields will be available from this view as well for each asset, location and CI field.

# View (Multi Assets/Locations/CIs)

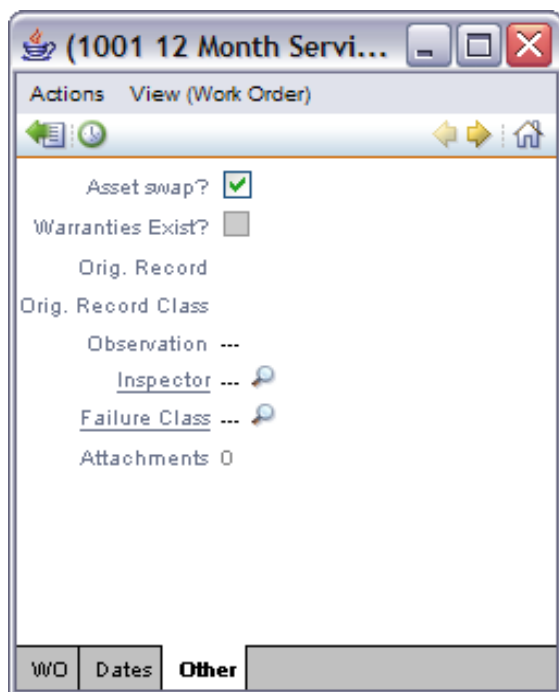


## Move/Swap/Modify Asset Actions

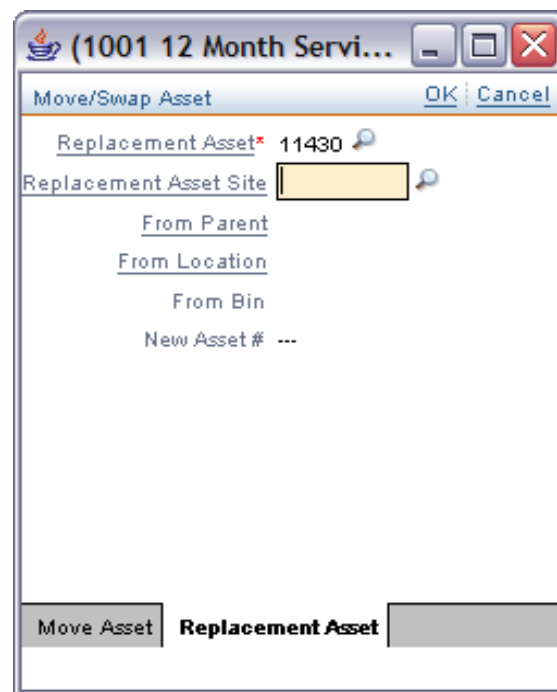
- With the addition of the new Multi Asset/Location/CI table, the underlying database table structure that supports the Asset Move/Modify functionality has changed.
- The ability to do a true Swap is now supported in core Maximo and will also now be supported in the Mobile Work Manager UI
  - A new Replacement Asset tab appears when Swap is selected
  - Behind the scenes, it essentially does two moves
  - Makes it much easier to define the details of the swap
- Mobile now supports this new database structure
- Mobile also now supports the new Swapping functionality
- User and Custodian Management was also added in core Maximo 7.1, but this is not supported in the Mobile application
  - Not supported because there was little justification for its use in a mobile environment.

# Swap Asset Screens

Choose Swap on the Other Tab



A Replacement Asset tab will then appear in the Move/Swap action screens



## Work Order & Ticket Classification Attributes

- A new Specifications View has been added to display the Classification Attributes for Work Orders and Tickets
- These attributes can be used to define dynamic attributes for different types of Work Orders or Tickets
  - A 'Wi-Fi Router Installation' type ticket may need specific detail like 'IP Address'
  - A 'Pump Inspection' type work order may need the inspector to gather specific details about the pump
- All of these specific details can be defined as Attributes for their respective Classifications
- Once a work order or ticket has been classified as such, the associated attributes will be available on that work order or ticket
- These attributes can have values that are already predefined on the work order or ticket or they can be used to collect information on the device and send it back to core

# Item Status

- Maximo 7.1 now supports the concept of a status on Items.
- The following statuses have been provided:
  - ACTIVE
  - OBSOLETE
  - PENDING
  - PENDOBS
  - PLANNING.
- Only Items that are ACTIVE or PENDOBS (or any synonym of these) will be available to download to the mobile applications for use.
- There is nothing a client needs to do to configure this in the Mobile Queries. This validation is built into the business rules.

## Performance Improvements

- Maximo Mobile 7.1 includes many performance improvements
- Driven by direct client feedback
- Download Performance
- Screen to Screen Navigation

## Deep Dive - Maximo Mobile Release 7.1.1

- New Mobile Asset Manager Application
- Enable Full Screen UI Support
- Software Update Management
- Send Independent Status Changes in Mobile Work Manager
- Crew Management and Labor reporting
- Linear Asset support in Maximo Mobile Work Manager
- Performance Improvements

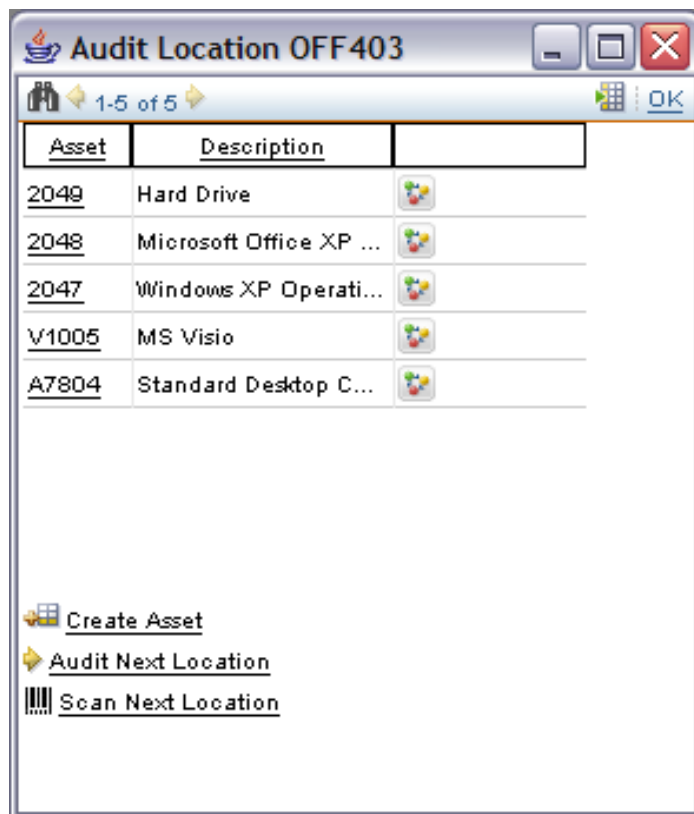


## New Mobile Asset Manager Application

- The primary functions of the Mobile Asset Manager
  - Navigate location and asset hierarchies with a drill down UI
  - View & Modify
    - Details, Classification Attributes
    - Spare Parts & Subassemblies
    - Users & Custodians
  - Enter Meter Readings
  - Move & Swap
  - Update Status
  - Create New Assets, Locations and CIs
  - Audit/Asset Inventory/Discovery Mode
  - View/Create/Manage by Route or Collection
  - Issue Items From Storeroom (Typically software in the IT world)

## Mobile Asset Manager – Asset Audit/Discovery

- The primary use case for the new Mobile Asset Manager application is an asset audit, or physical inventory of the fixed assets.
- This can function as a manual 'asset discovery' tool to build out the asset and location libraries in Maximo



## Mobile Asset Manager – Asset Audit Process

- An audit can be performed with or without the use of bar code scanning
- Using bar codes make the process more efficient, but all of the capabilities are available for either scenario
  1. Download the Locations and Assets that will be audited
  2. Navigate to the Location Worklist screen
  3. Scan or select the first location to be audited and choose the Location's Assets View to display the assets in that location
  4. Click 'Audit This Location'
  5. Verify the assets that are physically found in the location (scanning the bar codes of these assets will remove them from the list)
  6. If an asset that is listed cannot be found, the user would change the status of that asset to a status that indicates the asset is missing (Create a synonym status of 'Operating' for this purpose)
  7. If any new assets are discovered in this location, click Create Asset to create a new record for the found asset
  8. When done with this location, move to the next one and repeat.
    - Either scan the next location or move to the next location in the list

## Mobile Asset Manager – Associating New Records

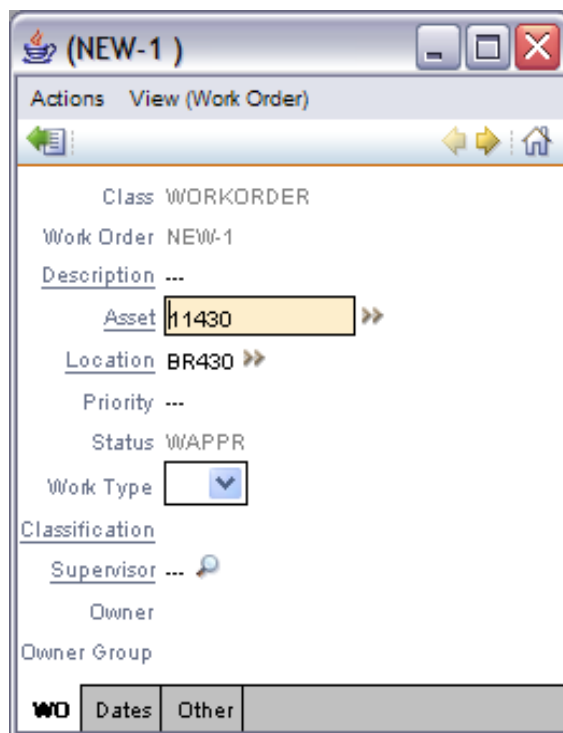
- Maximo Mobile Asset Manager allows users to create many types of new records as well as associate to each other
- A new location is created and three new assets that were found in that location are also created on the device.
- These records must all be sent together to core Maximo.
- 'Sending' only one of these asset records to core Maximo would fail because it would try to insert the asset record with a location defined that is not valid, because core Maximo does not know about it yet.
- Maximo Mobile will always evaluate the new records being sent to core and determine if they are associated in any way to other new records on the device.
- If this is the case, Maximo Mobile will display the associated records and ask the user to send them all at the same time.

## Enable Full Screen UI Support

- Supports the utilization of the full screen size when running on laptops and tablets.
- Enables multiple groupings of fields and tables on a single screen
- Ability to consolidate the important information onto fewer screens to reduce navigational 'clicks'.
- Ability to choose between small and large fonts and icon buttons.
- This is NOT intended to provide applications that have already been designed for larger screen sizes
  - This enhancement only provides the ability to configure screens to take advantage of additional screen real estate

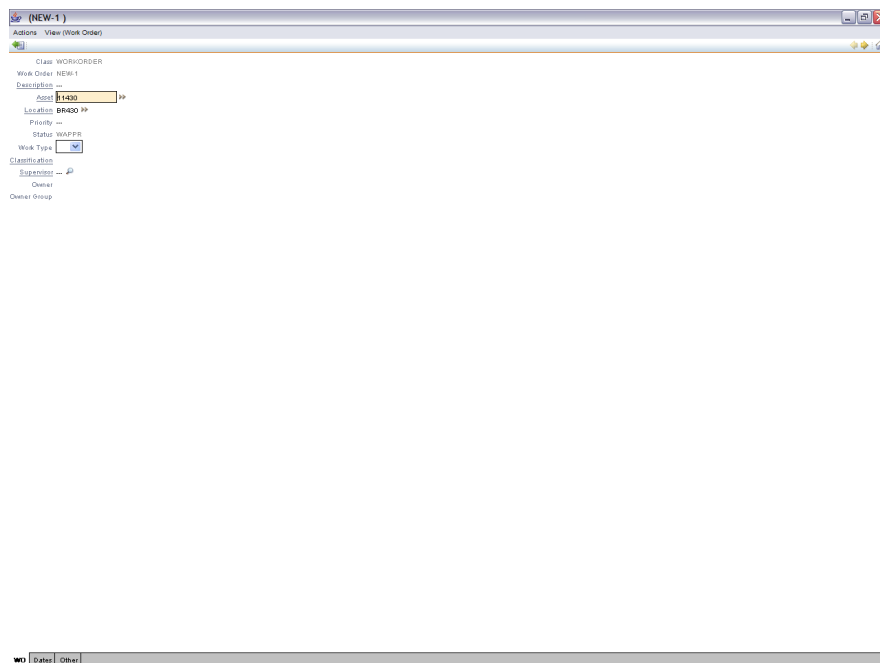
## Enable Full Screen UI Support

- When Maximo Mobile is run on a laptop, the application displays as a small window on the screen like this:



# Enable Full Screen UI Support

- If a user maximizes the screen, it uses up the entire screen real estate and looks like this:
  - There used to be no way of adding additional screen elements to the right hand side of the screen. They could only add additional elements to the bottom the the screen



# Enable Full Screen UI Support

- With this new enhancement, clients will be able to add additional screen elements and lay the screen out any way they choose:

The screenshot displays a software window titled 'Actions View (Work Order)'. The main area contains a form for a work order with the following details:

- Class: WORKORDER
- Work Order: 1152
- Description: Centrifugal Pump Service- 12
- Asset: 11430
- Location: BR430
- Priority: 8
- Status: APPR
- Work Type: PM
- Classification: PUMP \ CNTRFGL
- Supervisor: MILLER
- Owner:
- Owner Group:

Additional fields include Target Start (2/9/09 12:00 AM), Target Finish (2/9/09 2:00 PM), Asset away?, Warranties Exist?, Orig. Record, Orig. Record Class, Observation, Inspector, Failure Class (PUMPS), and Attachments (0).

Below the form is a section titled 'Report Actuals' containing a table with the following data:

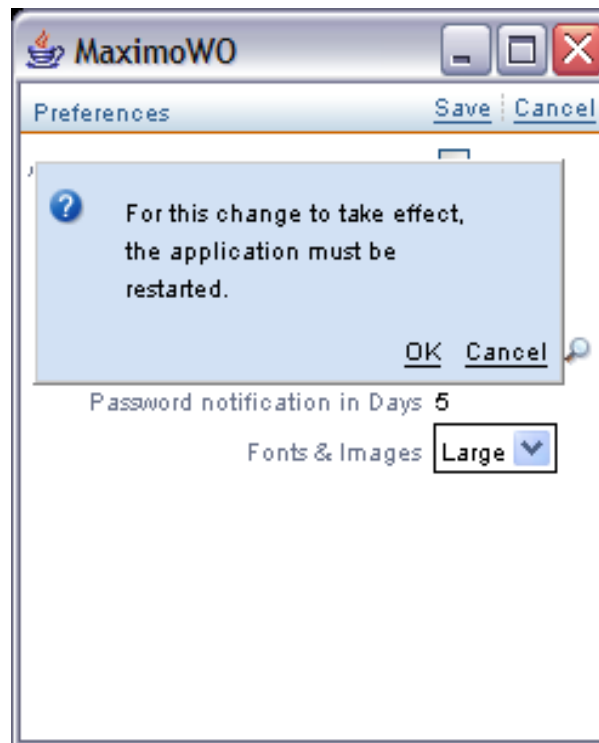
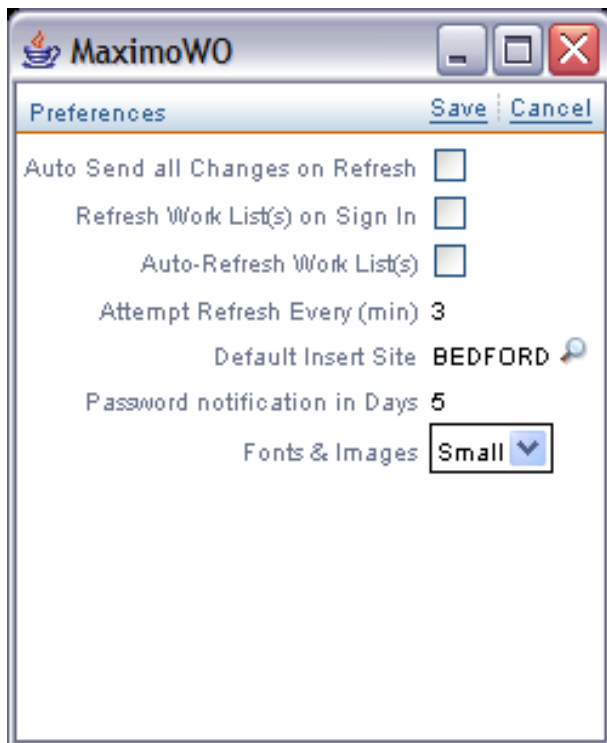
Task	Description	Status	Scheduled Start
10	Check pump operation.	APPR	
20	Check pump float switch.	APPR	
30	Check housing for leaks.	APPR	
40	Replace mechanical seal.	APPR	
50	Replace contactor & clean contactor compartment.	APPR	
60	Inspect impeller for wear	APPR	
70	Record amperage and voltage with motor operating.	APPR	
90	Inspect main disconnect and all electrical.	APPR	

At the bottom, there is a 'New Role' button and a 'Tasks' section with sub-sections for Labor, Materials, and Tools.



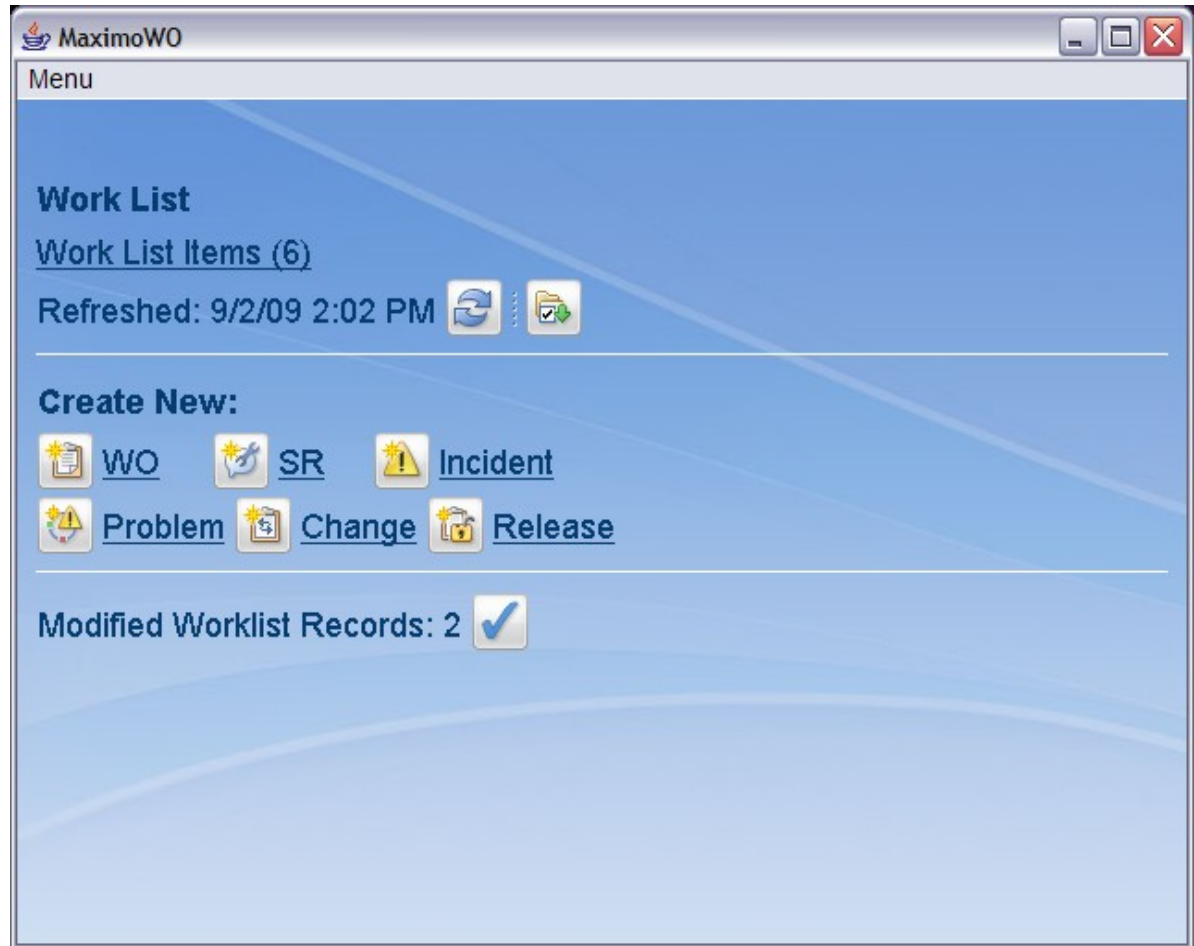
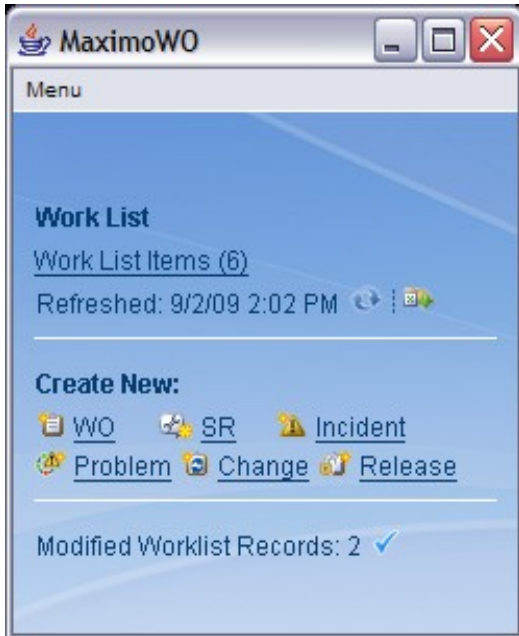
## Enable Full Screen UI Support

- Under the Preferences action off of the main menu, users can choose between Large or Small:



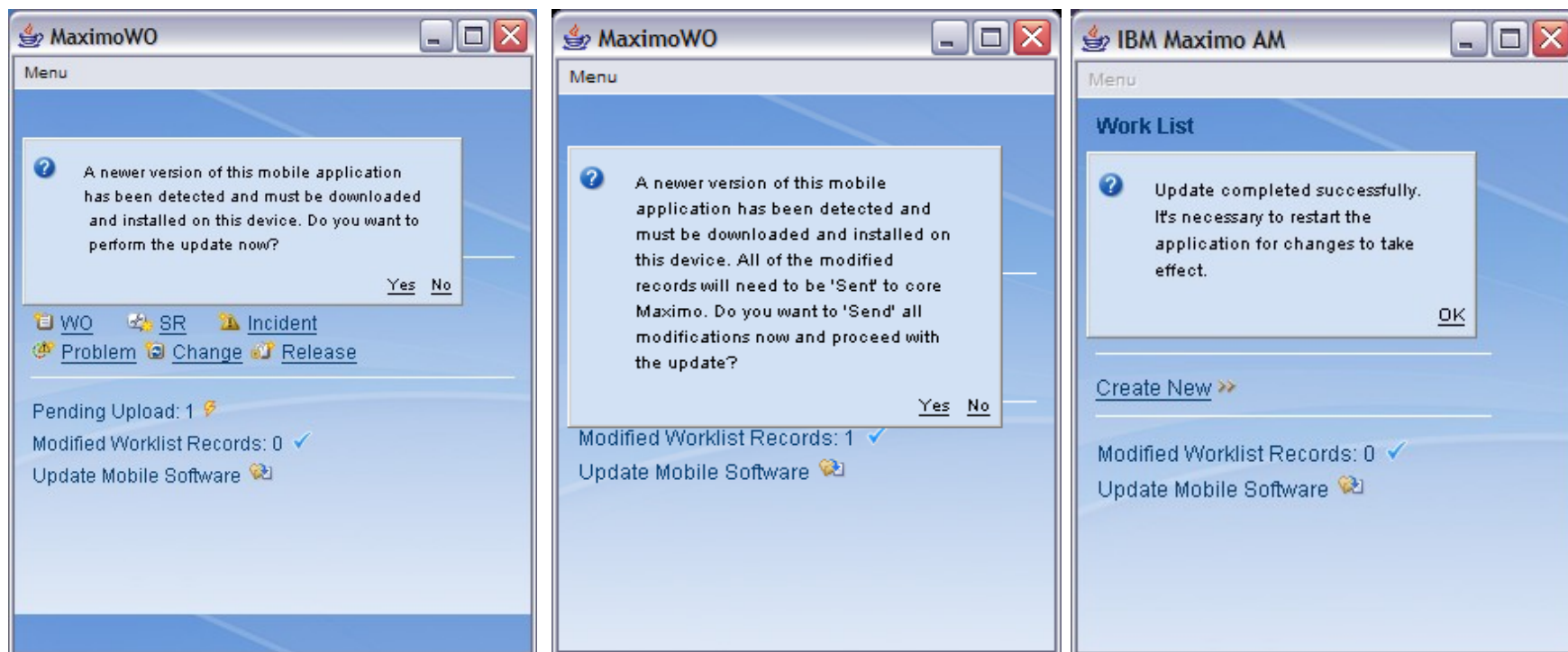
# Enable Full Screen UI Support

- Side by side comparison:



# Software Update Management

- Ability to remotely update the mobile software on PDAs
- Automated installation of the mobile software on PDAs

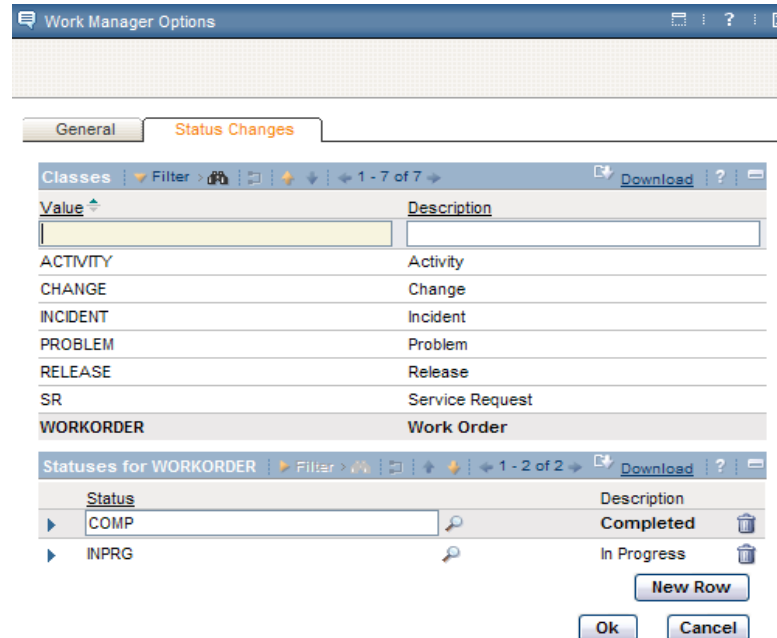


# Send Independent Status Changes in Mobile Work Manager

- Provides the ability to update a work order's status in core Maximo while retaining the Work record on the mobile device to continue working on it.
- Currently, if the user sends the work order and its status change, the work order will be removed from the device.
- The problem is that the user really only wants to 'send' the status change, not the whole work order. They want to send a status change of 'INPRG' to tell core Maximo that they have started working on this work order, but they do not want to send the whole work order because they will still have actuals to report.
- Ability to choose which statuses are sent independently.

# Send Independent Status Changes in Mobile Work Manager – Data Manager Options

- There is a new option in the Mobile Data Manager application for defining the status changes that will be sent independently
- A new tab called Status Changes has been added to the Work Manager Options action

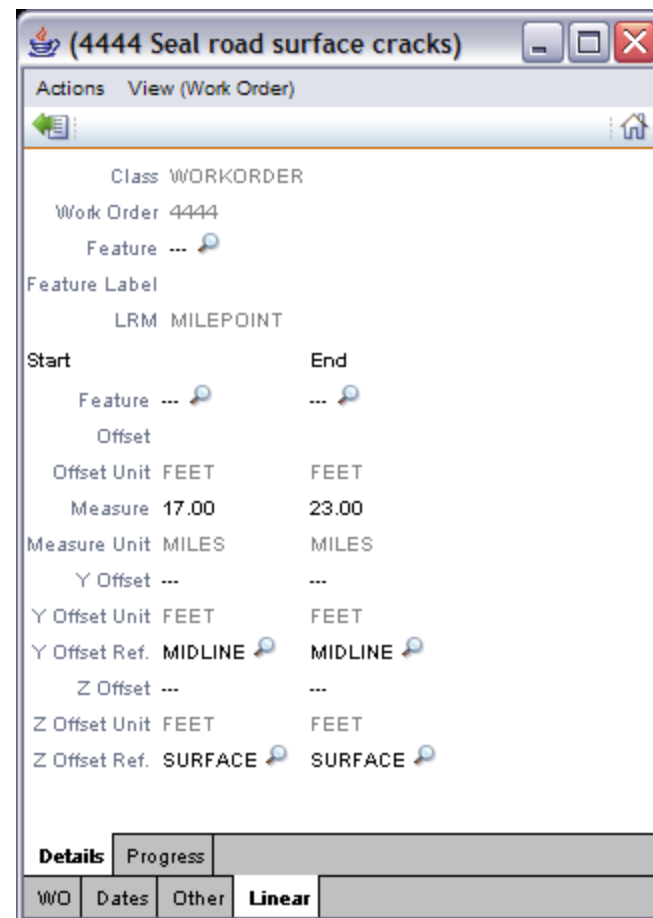


# Crew Management & Crew Labor Reporting

- Supports the ability to establish a 'current crew' on the device
  - Based on a list of LABORCRAFTRATE records
- Only defined on the mobile device
  - Does not create Crews in core Maximo
- Supports Utility Industry Solution Crews
  
- Supports the scenario where a group of workers are working together as a team or crew or gang.
- Enables a single labor time entry for the 'current crew'
- This single entry is then used to create individual entries for each member of the 'current crew'

# Linear Asset support in Maximo Mobile Work Manager

- Supports the linear details of assets in Mobile Work Manager
- High Level summary of enhancements:
  - Linear details on the Multi Asset Loc CI Details Page
  - New Linear Tab for Work order details
  - New Linear Tab to support the MultiAssetLocCI Table
  - Add Linear details to Measurements
  - Add Tab to Support Work Order Linear Progress



# Performance Improvements

- Maximo Mobile 7.1.1 includes many performance improvements
- Driven by direct client feedback
- Download Performance
- Screen to Screen Navigation
- Splash Screen at Start Up
  - When a user first launches the mobile applications, there is a pause of at least 5-10 seconds where the application is launched and initialized. During this time, the user was not being given any indication that anything was happening. This enhancement will display a splash screen immediately to make sure the user has been notified that the app is launching.



## Deep Dive - Maximo Mobile Release 7.5

- Calibration added to Core
- New Inventory Features now supported:
  - Stocked Non-Stocked Item support
  - Hard/Soft Reservation support
  - PO Revisioning support
  - Receipt Tolerances
  - Valid GL Date Ranges
- Enhanced Failure Reporting Configuration

## Move Mobile Calibration into Base Maximo Mobile

Maximo Calibration and Maximo Mobile Work Manager are two products that have been working together to deliver Calibration Data Sheet functionality to users of Mobile Work Manager. The code to support these data sheets has existed in the Calibration Industry Solution code base. The mobile code to support the Calibration Data Sheets will be incorporated into the standard Maximo Mobile Work Manager application.

This will be the exact same functionality currently offered. It is just a matter of moving the existing code from one base to another. Within Maximo Mobile, these new data sheets will only display if a work order containing the data sheet details is displayed (just like it works today).

## Support for Stocked/Non-Stocked Item Functionality

This is new functionality added in core Maximo 7.5 that will need to be supported in Maximo Mobile 7.5

### Maximo Mobile Work Manager

In Material Request – if you specify a storeroom - Non-stocked items need to be filtered out when we reference a storeroom. Only stocked items are allowed in INVENTORY . If a non-stocked item is entered, storeroom field needs to be read-only and null

Actual material Usage – should not be able to choose an item storeroom combination for non-stocked

Added predefined where clauses that block all non-stocked for items from Inventory and Asset Manager

Work Manager needs to allow them for Material Requests directly from a vendor, but block their usage anytime they come from a work order.

## Support For Hard and Soft Material Reservations

In Maximo 7.5, material reservations can be defined as either hard or soft reservations. If a material has a 'hard' reservation, it must be enforced as such

This will effect the following features in Maximo Mobile:

- Select Reserved Items in Work Manager

- Issue Reserved Items in Inventory Manager

If it has to be a hard reservation, we need to validate that it is a hard reservation.

- Will require some additional filters and error messages

Inventory records have a new flag HARDRESISSUE or something like that.

- If that flag is N – everything works the way it used to

- If that flag is Y, then it can only be issued if a HARD reservation exists and the issue references that hard reservation.

- This will effect transfers and issues out of storerooms

- Enter Actual Material – you can do it for a hardresissue item if it references a hard reservation record

## Default Costing Method

Maximo 7.5 will introduce new costing methods for Items. These costing methods involve some significant code to determine. Because of this, Maximo Mobile is removing all cost fields for inventory.

## PO Revisioning

Maximo 7.5 will introduce true revisioning for Purchase Orders.

Mobile Inventory Receiving needs to make sure it is fetching the right version of the PO.

Need to refer to revision #. Only bring down active POs.

This will effect the filtering of records in Mobile Inventory Manager

- Predefined queries for POs

- Connected Lookups

- Download Now for POs

## Receipt Tolerances

Maximo 7.5 will introduce receipt tolerances. This will govern whether a user can receive more items or materials than were ordered on the PO. The tolerance defines by how much a user can exceed the ordered amount.

This will affect the Mobile Inventory Manager Receiving feature - Receipts against POs

## Valid Date Ranges for GL Accounts

In Maximo 7.5, GL Accounts will now have a valid date range associated with them.

This date range must be used to determine if the account is valid

ACTIVEDATE and EXPIREDDATE have been added to the CHARTOFACCOUNTS table

Maximo Mobile Work Manager and Inventory Manager both download and use GL Accounts

The GL Account download queries will need predefined where clauses to only download valid accounts based on the dates.

Connected Lookups should filter out GL Accounts based on the valid date range.

GL Accounts that have already been downloaded will still need to be validated upon use in the mobile applications because they may have been valid when they were downloaded, but have past their end dates while residing on the device



## Enhanced Failure Reporting Data Group Setup

Failure Reporting now allows for more specific selection of which failure codes are allowed

The scenarios that need to be support are as follows:

1. Download no failure information at all
  - a. Supported already – Don't create any Failure Class Additional Data queries
2. Download only failure classes based on an additional data query
  - a. Supported already – Create Additional Data queries for Failure Classes
3. Download failure classes based on an additional data query as well as all failure codes underneath those selected failure classes (controlled by a Supporting Data checkbox)
  - a. This would allow the users to select the 'branches' of the failure hierarchy based on the top-level failure classes as well as give them the ability to select all failure classes and the hierarchies below them so they could get the entire failure hierarchy downloaded
4. Download all failure codes that fall under the hierarchy of the failure class defined on the assets that are on the work orders that are being downloaded
5. Download all failure codes that fall under the hierarchy of the failure class defined on assets being downloaded via an additional data query

# Maximo Everyplace



## Deep Dive - Maximo Everyplace 7.1

- Access to the same Maximo you use from desktop browsers, but with expanded browser support
  - Apple iOS, Android, Blackberry
  - Also, Windows browser that are currently supported by traditional Maximo
  
- Ability to configure screens for mobile devices running supported browsers through special App Designer features
  - Configuration happens on a desktop machine, not a mobile device

Application Designer

Applications | Workspace

Application: MWOTRACK | Work Order Tracking Mobile

Main Object: WORKORDER | Report Object: REP\_WO

page...

tabgroup

List | Main

TABLE TITLE

tbody

Work Order	Description

(480 x 268)



Application Designer

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action

Applications Workspace

Application WOTRACK Work Order Tracking Is Mobile? Viewport iPhone wide (480) Main Object WORKORDER Report Object REP\_WO

page...  
tabgroup...  
List Work Order Plans Related Records Actuals Safety Plan Log Failure Reporting Specifications

Advanced Search Save Query Bookmarks

Work Orders Filter

tbody...  
table border="1">| Work Order | Description | Location | Asset | Status | Scheduled Start | Priority | Site |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |

Some sizes come pre-loaded; add others via a domain. The Viewport size corresponds to the size of the red box

Add domains by specifying the desired resolution in the value field. The next time you go to the Application Designer, the new viewport is available.

The screenshot shows the Tivoli software interface. On the left, a 'Domains' panel lists 'viewport' and 'VIEWPORT'. The main window, titled 'ALN Domain', shows configuration for the 'VIEWPORT' domain with a 'Data Type' of 'ALN' and a 'Length' of '9'. Below this is a table of 'ALN Domain' entries with columns for Value, Description, Organization, and Site. The table lists various resolutions like 1041x600, 320x416, 320x533, 480x268, 533x320, 730x874, and 954x636. At the bottom, there are input fields for 'Value \*', 'Description', 'Organization', and 'Site', along with 'View/Modify Conditions', 'New Row', 'OK', and 'Cancel' buttons.

Value	Description	Organization	Site
1041x600	Default (1041x600)		
320x416	iPhone (320 x 416)		
320x533	Android		
480x268	iPhone wide (480 x 268)		
533x320	Android Wide		
730x874	iPad		
954x636	iPad Wide		

The screenshot shows the Tivoli Application Designer interface. At the top, the title bar reads "Application Designer" and includes navigation options like "Bulletins: (0)", "Go To", "Reports", "Start Center", "Profile", "Sign Out", and "Help". Below the title bar is a toolbar with various icons for actions like "Find", "Select Action", and "Viewport". The main workspace area shows the configuration for an application named "WOTRACK2" (LL Work Order Tracking). The "Is Mobile?" checkbox is checked, and the "Viewport" is set to "iPhone wide (480)". The "Main Object" is "WORKORDER" and the "Report Object" is "REP\_WO". A preview window on the left shows a mobile-optimized view of the "Work Order" list, with a red box highlighting the content and an arrow pointing to the "Is Mobile?" checkbox.

Select 'Is Mobile?' checkbox to switch to a look that includes larger fonts and screen elements that are easier to control with your finger instead of a mouse

## Differences when 'Is Mobile?' is checked

- The screen darkens when Maximo is working
- The top banner lacks Go To, Bulletins and Help links
- There is no Select Action menu
- Table window toolbars include only Previous, Next and Filter
- Table windows have a toolbar at the top **and bottom** of the table
- Tooltips and Field Help do not appear when using mobile devices (though they do on laptops and desktops)







## Connectivity

- Because Everyplace requires connectivity, users will need to have a data plan (3G, 4G) or WiFi to access Maximo from their device browsers
- VPN may be required. Customers need to ensure that they are using a VPN supported by the devices they have chosen.

## What's included (and not)

- New Application Designer functionality to make designing for different screen sizes easier
- A new look for Maximo applications that can be applied on a per-application basis. It makes interacting with Maximo easier on a touch screen
- No new apps are included. Rather, we're delivering the toolkit in the Application Designer to help customers make their own applications easier to use across a range of devices.
- All the *functionality* of Maximo 7.1.1.7 is available for use in Maximo Everyplace applications
- Use any control available from the Application Designer Control Palette (but only these controls!)
- An information center for documentation

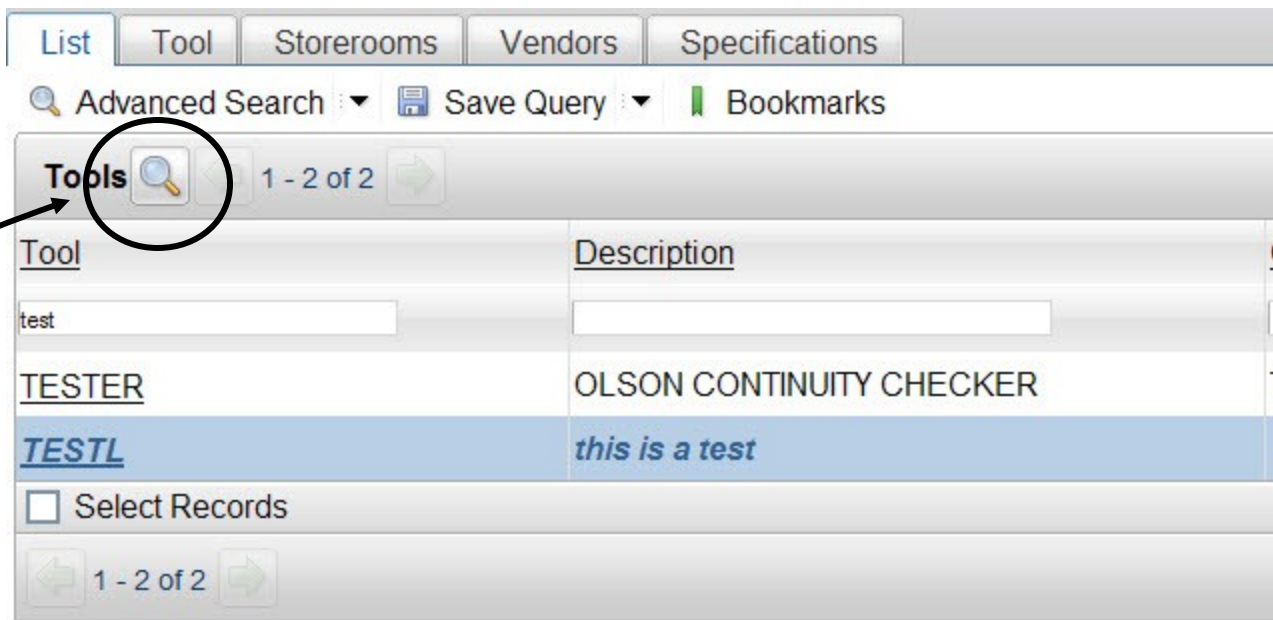
## Which Maximo products does Everyplace work with?

- Maximo for Asset Management
- Tivoli Asset Management for IT
- Maximo Essentials
- Industry Solutions: Utilities, Oil and Gas, Life Sciences, Transportation, Nuclear Power, Government
- No support for products with complex visualizations or applets: Spatial, Scheduler
  - These products provide controls which are central to their value proposition and not configurable via the Application Designer

## Deep Dive - Maximo Everyplace 7.5

- Table window retain row: Works same as TPAE, but without refresh button on List table
- Rich Text support
- Date/time pickers: New versions/different from TPAE

# Table Window Retain Row



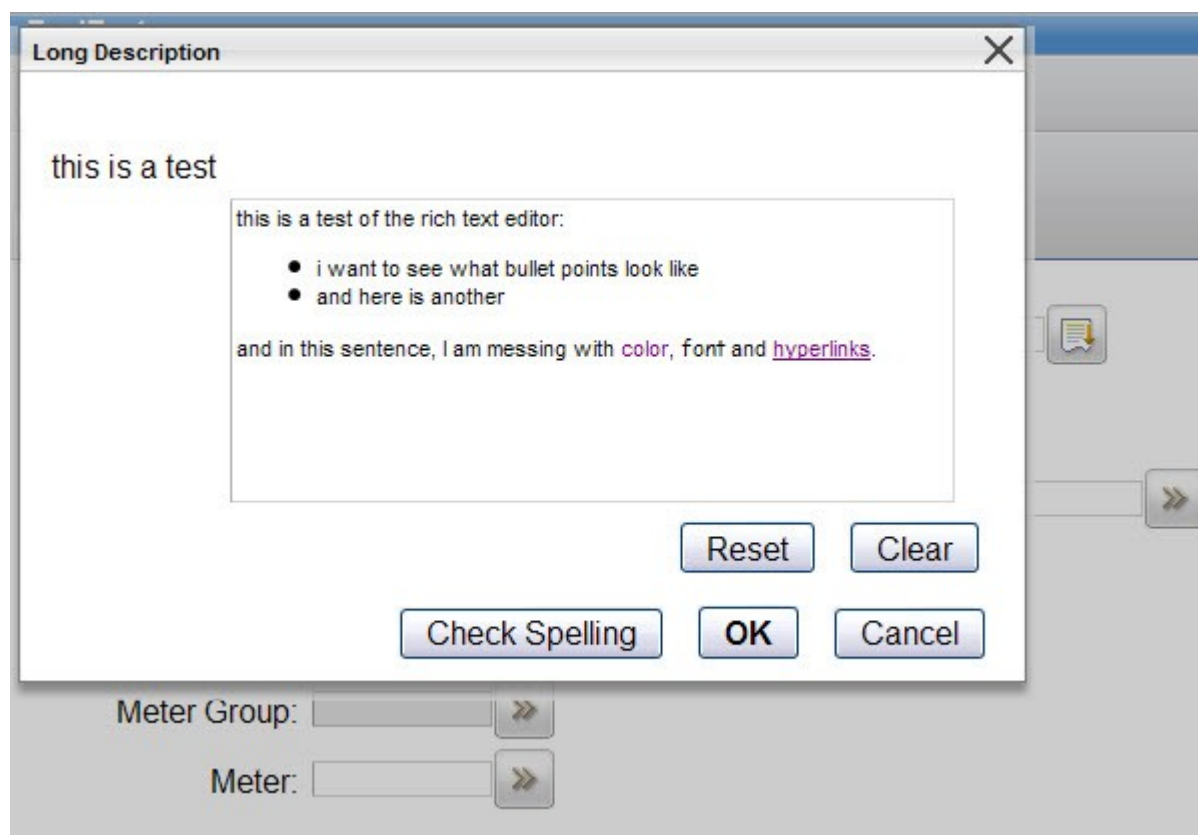
The screenshot shows a software interface with a navigation bar at the top containing tabs for 'List', 'Tool', 'Storerooms', 'Vendors', and 'Specifications'. Below the navigation bar are search and action options: 'Advanced Search', 'Save Query', and 'Bookmarks'. The main content area is titled 'Tools' and displays a table with two columns: 'Tool' and 'Description'. The table contains three rows: a header row, a row with 'test' in the 'Tool' column and an empty 'Description' column, and a row with 'TESTER' in the 'Tool' column and 'OLSON CONTINUITY CHECKER' in the 'Description' column. The third row is highlighted in blue and contains 'TESTL' in the 'Tool' column and 'this is a test' in the 'Description' column. A magnifying glass icon is circled in the top left of the table area, with an arrow pointing to it from the text below. Below the table is a 'Select Records' checkbox and a pagination control showing '1 - 2 of 2'.

Tool	Description
test	
TESTER	OLSON CONTINUITY CHECKER
<b>TESTL</b>	<i>this is a test</i>

Instead of hitting a refresh button to refresh screen, hit the magnifying class to re-run query

## Rich-Text Editor

- You can see, but not enter, rich text on the supported mobile devices. The editing toolbar is not available.





# Everyplace Date and Time Lookups

## Date

Installation Date:

\* Purchase Price:

Replacement Cost:

PO:

**Downtime**

Last

**Monday, March 7, 2011**

▲	▲	▲
Mar	7	2011
▼	▼	▼

Current Clear Field OK Cancel

## Date Time

Target Start:  Actual Start: 1/3/02 12:09 PM

Target Finish:

Scheduled Start: **Monday, March 7, 2011 9:57 AM**

Scheduled Finish:

No Earlier Than:

No Later Than:

▲	▲	▲	▲	▲	AM
Mar	7	2011	9	57	
▼	▼	▼	▼	▼	

responsibility

Reported By: Fred

Current Clear Field OK Cancel

## Time

8:00 AM

**10:14 AM**

▲	▲	AM
10	14	
▼	▼	

Current Clear Field OK Cancel

The lookups are easier to use on a small touchscreen device, and look more like the UI controls typically used on those devices.

# Maximo Scheduler 7.5.1 Everyplace Templates



## Deep Dive - 7.5.1 Maximo Asset Management Scheduler Everyplace Template Applications

- 4 New Application Templates have been created:
  - **Everyplace Technician (Tablet)**
    - Large Screen Heavy Technician Functionality - TECHTABLET.xml
  - **Everyplace Technician (Phone)**
    - Small Screen Heavy Technician Functionality - TECHPHONE.xml
  - **Everyplace Technician (Lite)**
    - Small Screen Light Technician Functionality (Inspector, Break/Fix, Rapid Dispatch) - TECHLITE.xml
  - **Everyplace Supervisor**
    - Small Screen Supervisor Functionality - SCHSUPER.xml

## Product Overview

### Enhanced My Work Tab

- Map Integration
- Summary of Required Resources
- Enhanced Start and Stop Timers
- Enhanced Crew Support
- Consolidated Screen Layouts
- Removal of unnecessary features
- Dialog Box clean-up
  - 80% of the effort
- These are ‘Templates’
  - Good starting point
  - Dialog clean-up is extremely helpful.

# Product Overview

AT&T 1:57 PM

Everyplace Technician (Phone) Start Center Sign Out IBM

My Work Details Resources Results

Advanced Search Save Query

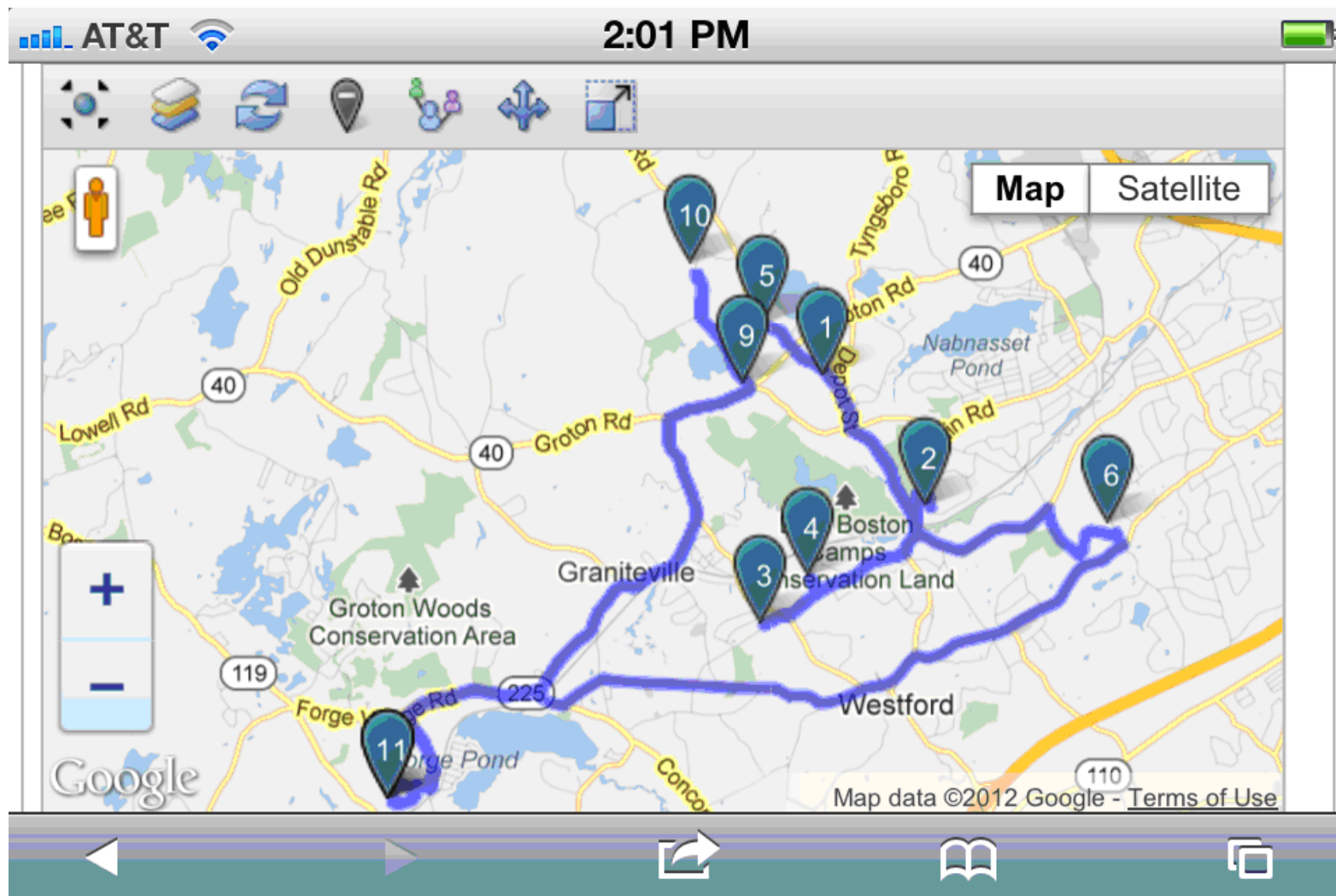
**Work Orders** 1 - 11 of 11

Work Order	Description
420	
<b>42006</b>	<b>Inspection</b>
42003	Inspection
42001	Inspection and Certification

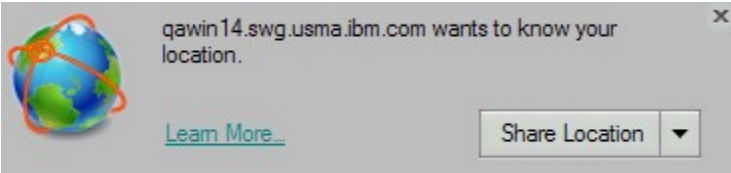
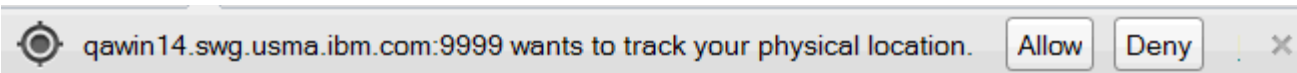
## Deep Dive – Map View

- The map view in the Everyplace apps show you the following:
  - Assigned Work Orders
  - The driving route for those work orders
  - Unassigned Work Orders
  - Labor resources in the same map area (Crews and/or Labor)
  - Driving Directions to the next work order
  - Current Location
  
- Requires Google or Bing Maps or Maximo Spatial (ESRI)
  - Requires a Bing or Google Premier license

# Deep Dive – Map View

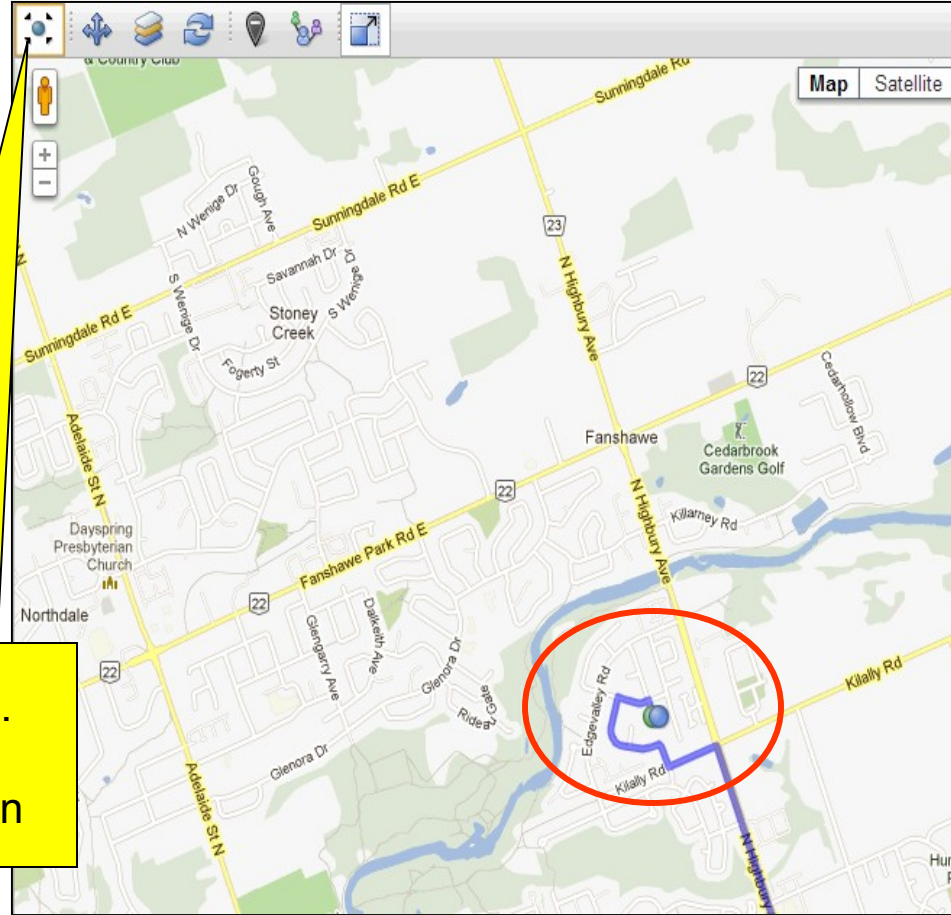


# Map – Share My Location



When Geo-location information is set up for labor/crews the Browsers will ask to 'Share Location'.

'My Location' icon. Shows field technicians location





# Map – Route Directions

1 288 Commissioners Rd W, London, ON N6J 1Y3, Canada

3.3 km - 5 min

1. Head east on Commissioners Rd W toward Knights Hill Rd 1.2 km
2. Turn right onto Wharncliffe Rd S/ON-4 S 1.8 km
3. Turn right onto Southdale Rd W  
Destination will be on the left 0.3 km

2 166 Southdale Rd W, London, ON N6J 2J1, Canada

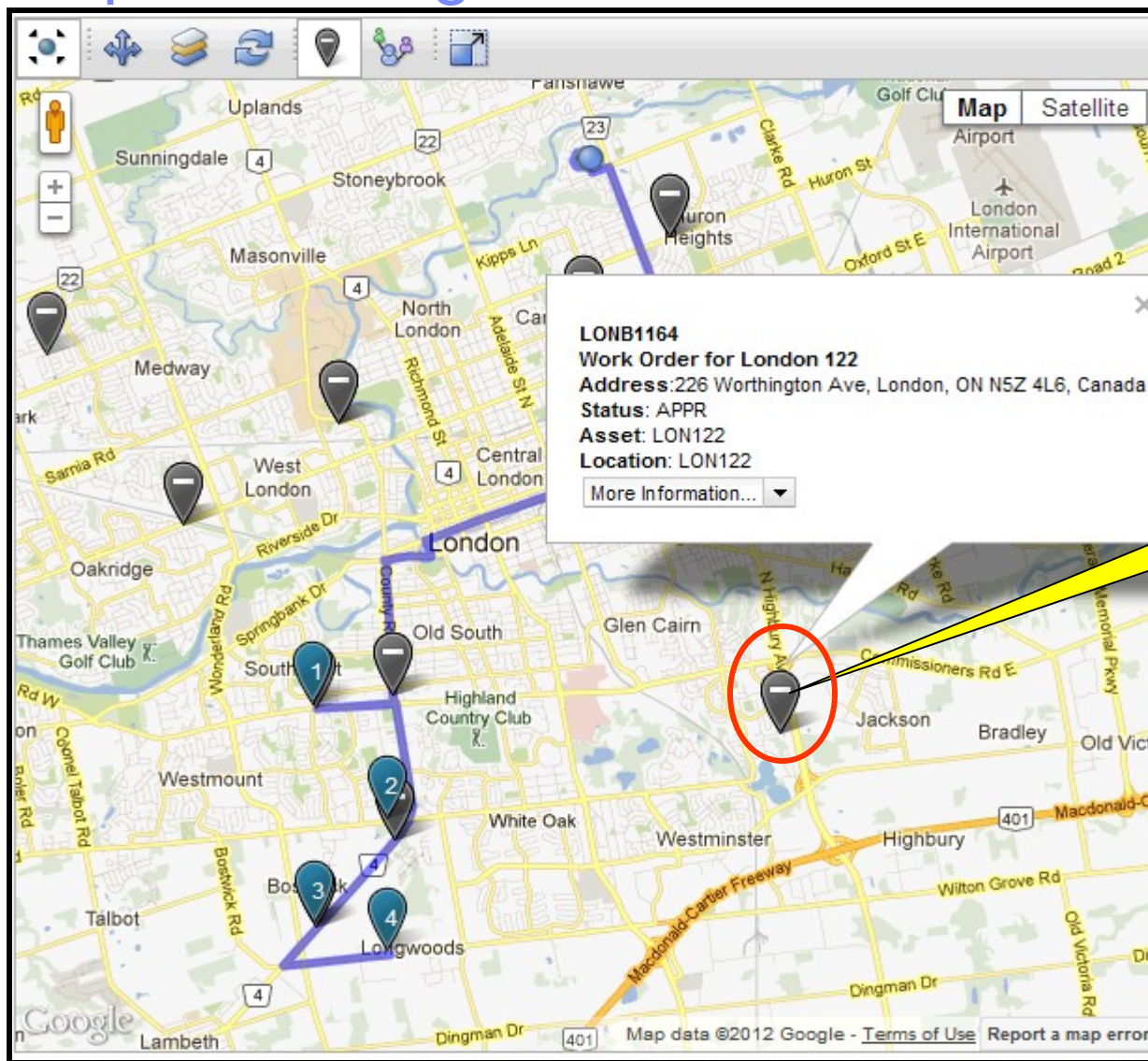
2.4 km - 3 min

1. Head east on Southdale Rd W toward Wharncliffe Rd S/ON-4 S 0.3 km
2. Take the 1st right onto Wharncliffe Rd S/ON-4 S

Close

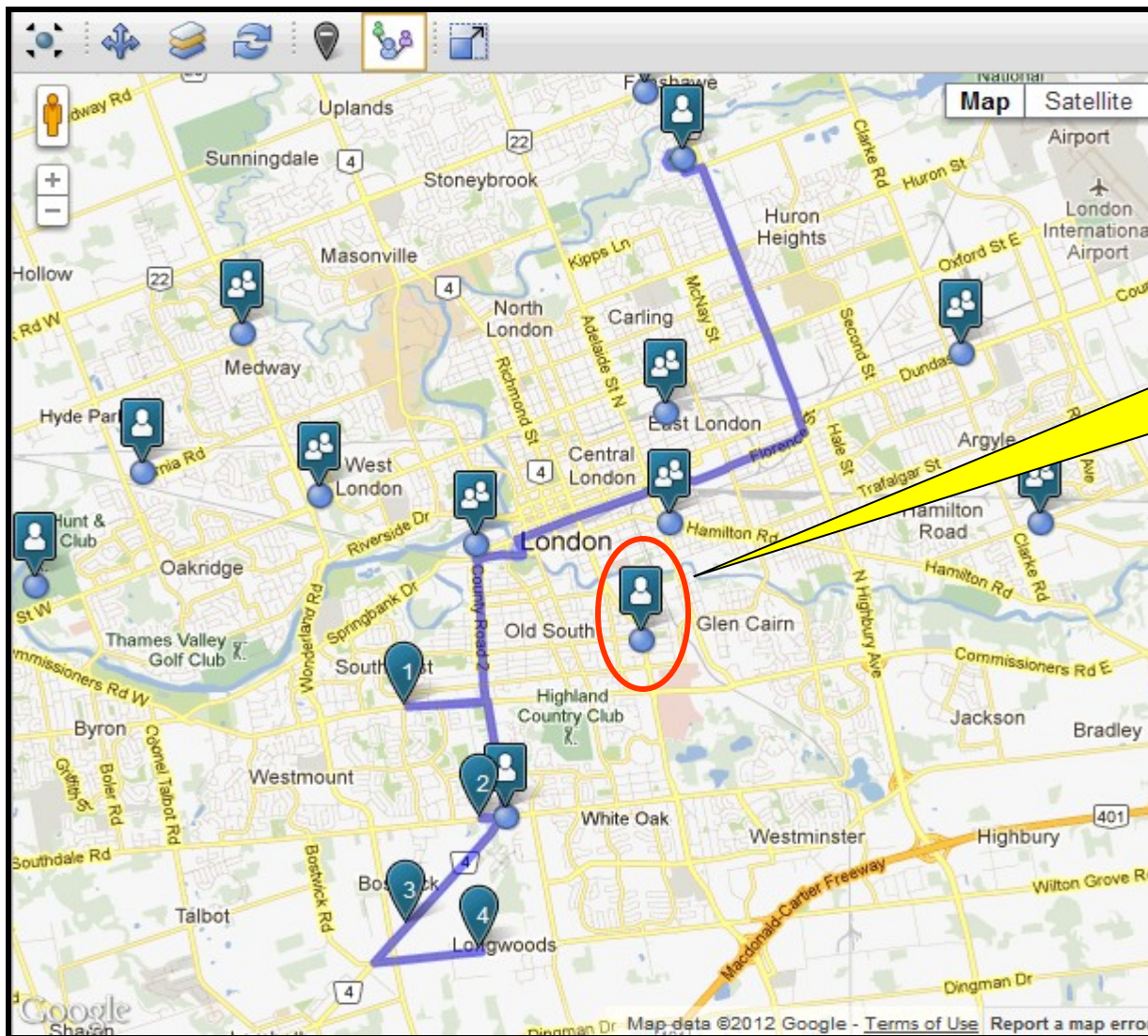
Turn-by-Turn directions to take you from one Work Order to the Next.

# Map – Unassigned Work Orders



Based on a Query find Unassigned Work Orders for the current map zoom level.

# Map – Nearby Labor/Crews



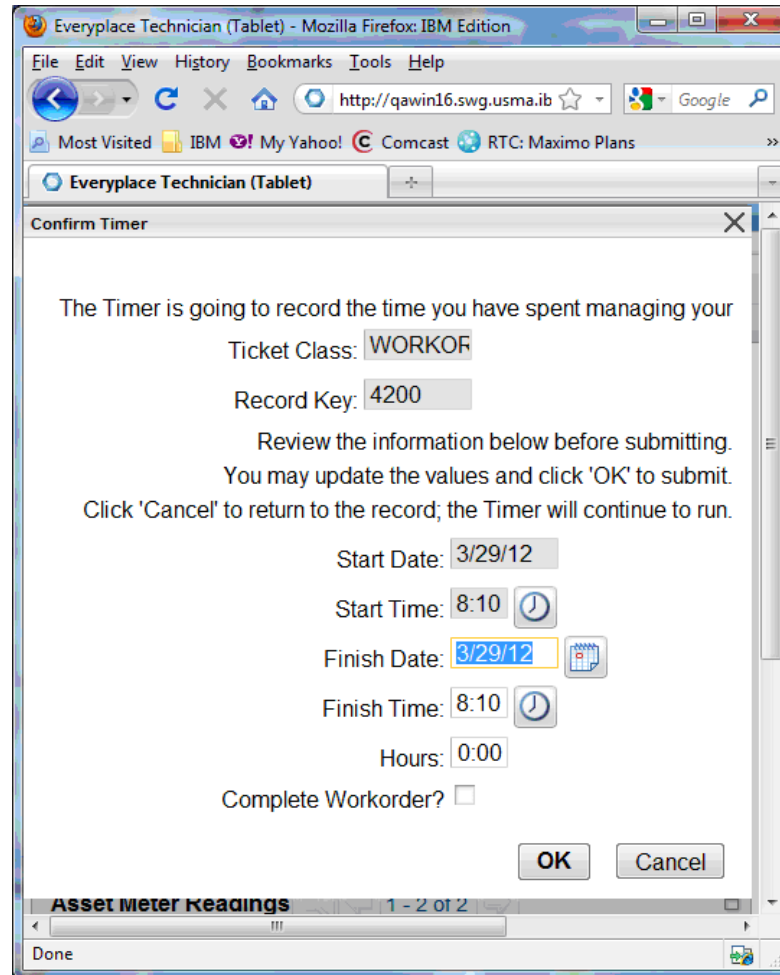
Look for all Labor/Crews within the current map zoom level.

## Deep Dive – Start and Stop Timers - Maxvars

- Supports Automatic Status Changes
- Supports Crew Reporting
- 2 New Maxvars – Organization / System Settings
  - MAXVAR – STARTTIMERINPRG - Allows the client to determine if starting the labor timer should put the work order INPRG if it is not already. If this maxvar is turned off, then the functionality will be the same as it is today. The Start Timer button just starts the labor timer. When this setting is turned on, when the timer is started on a work order, the work orders status will be changed to INPRG if it was APPR. If the status is anything other than APPR or a synonym of APPR, then the status change will not occur. This will be a Y or N field.
  - MAXVAR – STOPTIMERCOMP – Allows the client to define the default value for the checkbox on the Stop Timer Dialog. This checkbox determines if the work order's status will be set to COMP when you stop the timer. This maxvar just sets the default value on the dialog. A user can choose to override this when they actually stop the labor timer. This will be a Y or N field

# Deep Dive – Start and Stop Timers - Confirmation

- Enhanced 'Stop Timer Dialog'



## Deep Dive – Crew Support

- Crews in Scheduler are supported in the Everyplace Application Templates:
  - View them on the map
  - Assign/Reassign/Unassign them
  - Actual Labor Entry:
    - Report labor and tool time via the Start and Stop Timer actions
    - Enter By Crew button in the Actual Labor section
    - Automatically determines if the current user is a member of an active crew
  - Writes the ‘CREWID’ to the labor and tool transaction records
  - No ‘Crew Management’ in the Everyplace Application Templates
  - Auto Approve Labor Transactions and Reporting Labor by Crew
    - Once a Labor Transaction is approved it becomes read only.
    - If auto approve is turned on the Enter by Crew action must allow the user an opportunity to edit the transactions that got created.
    - This window of opportunity will be from the point the user enters the details for the crew labor report and the time the user clicks save. For this reason, there should be no auto-save after using the Enter By Crew action. Save must be a choice by the user.

## Crews in Everyplace Templates

- The Everyplace templates give the crew member an abbreviated version of the Enter Time by Crew dialog
- When a user logs in Maximo determines if they are part of a crew and presents them with different options than a single labor user
- The user only needs to fill in the Task (if any), Start and End date/time, Regular Hours and Type
- The application will create records for all labor and tools for this Work Order with the information given

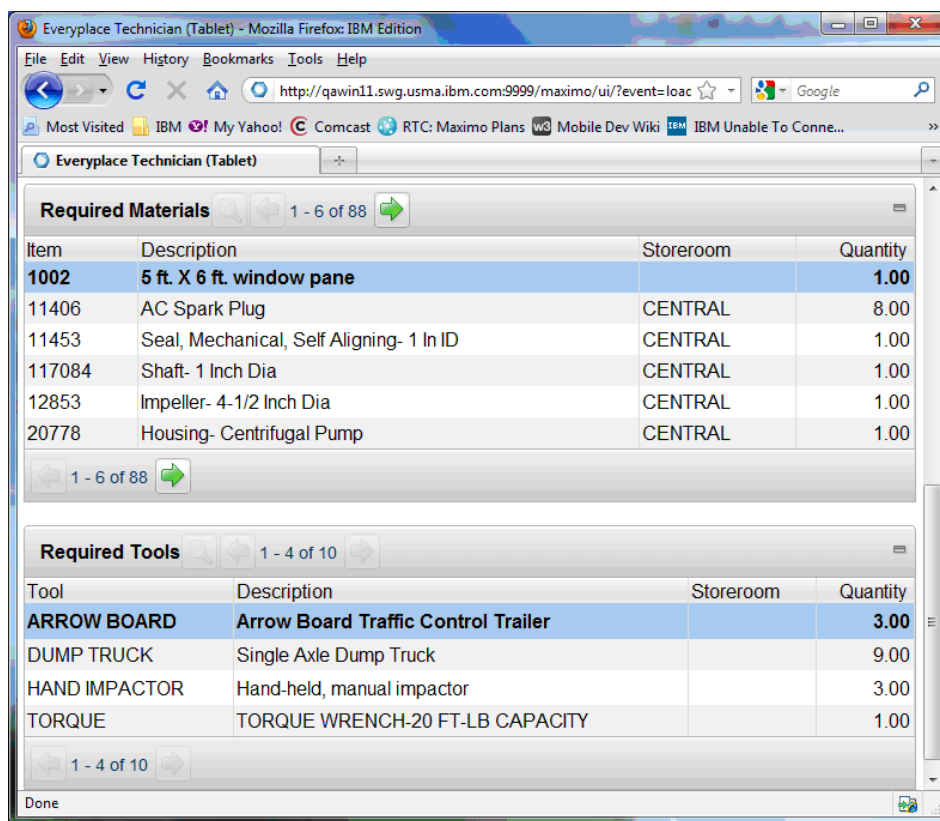
The screenshot shows a dialog box titled "Enter By Crew" with a close button (X) in the top right corner. Below the title bar is a blue warning icon and text: "This action will create transactions for all of the labor and tools defined on your current crew." The form contains the following fields and controls:

- Task:  with a magnifying glass icon.
- \* Start Date/Time:  with a calendar icon and a clock icon.
- \* Regular Hours:
- End Date/Time:  with a calendar icon and a clock icon.
- \* Type:  with a magnifying glass icon.

At the bottom of the dialog are two buttons: "OK" and "Cancel".

# Deep Dive – Summary of Required Resources

- My Work Tab summarizes the total required materials and tools for the work orders on the My Work tab – the same work orders that appear on the map.

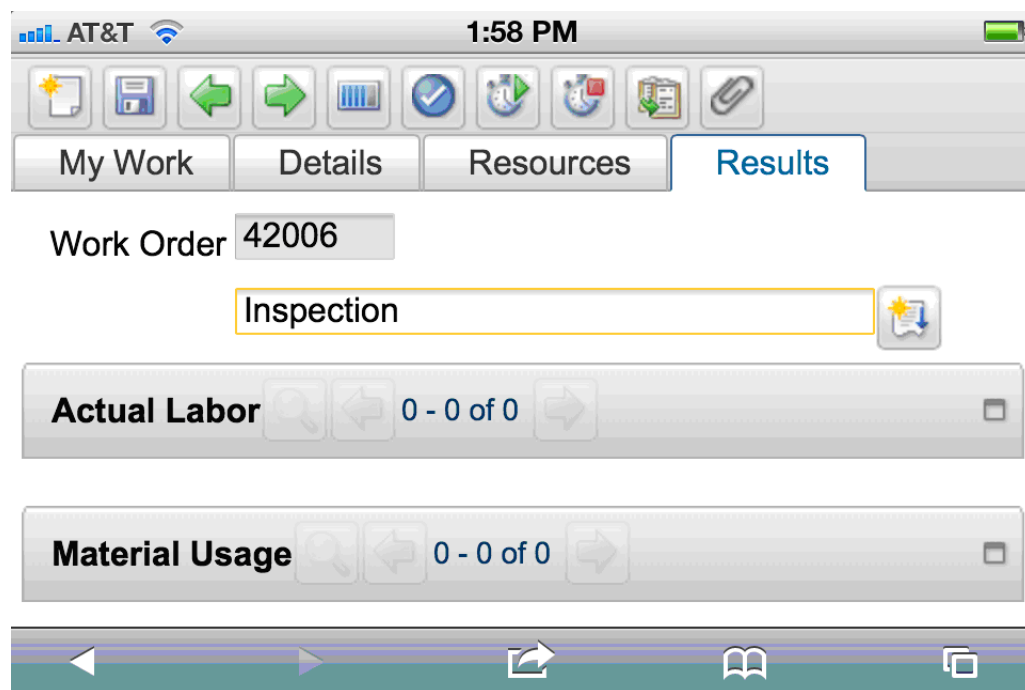




## Deep Dive – Miscellaneous Features

### Consolidated Screen Layouts

- Removal of unnecessary features
- Dialog Box clean-up
  - 80% of the effort
- These are ‘Templates’
  - Good starting point
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Thank You !