Support Technical Exchange: Maximo Licensing and Packaging overview

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Introduction

- Maximo Licensing and Packaging changes were introduced in August 2012.   This will give an overview of those changes in context of overall Maximo Licensing guidelines.

Maximo Solutions

IBM

Core Solutions — Stand-alone solutions for asset, facility and real estate management.

Maximo Asset Management

Maximo Asset Management Essentials

Maximo Asset Management user types include:
Authorized User
Limited Use User
Express Use User

Industry Solutions — Industry-specific capabilities for the unique requirements of asset-intensive industries.

Maximo for Transportation

Cal
Maximo for Life Sciences

Cal
Maximo for Nuclear

Spatial
Maximo for Utilities

HS&E
Maximo for Oil & Gas

Maximo for Government

Add-on Solutions — Additional options, used with core or industry solutions, provide deeper functionality for specific needs.

Maximo Scheduler

Maximo Linear Asset Manager

Maximo Archiving

Maximo Calibration

Maximo Spatial

Maximo Service Provider

Maximo Health, Safety & Environment Mgr

Maximo Asset Configuration Manager

Maximo Mobile

Maximo Everyplace

SMART Mobile (Syclo)

Integration Adapters — Commercially-supported integration to other enterprise and 3rd party systems.
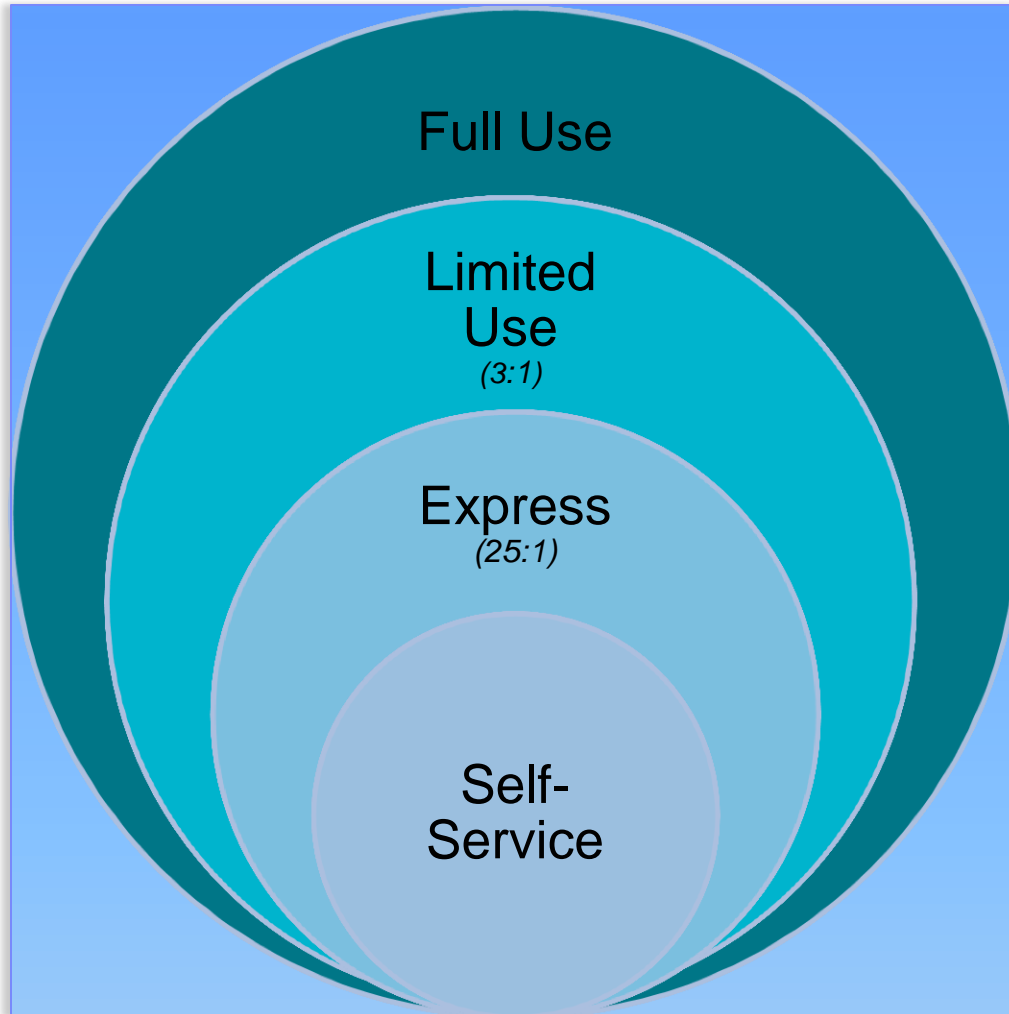
Maximo Adapter for SAP

Maximo Adapter for Oracle

Maximo Adapter for Primavera

Maximo Adapter for MS Project

IBM

Levels of Entitlement For Maximo Asset Management & Industry Solutions

Full Use

Limited Use
(3:1)

Express
(25:1)

Self-Service

All Modules and Applications within the system available

$$$$

Access to 3 modules within Maximo (*excludes administrative*)

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View and run reports, Change Status, Update Work orders assigned to me

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Create and view my Requests, Requisitions, Incidents, View my Assets

No charge

At least 1 Full Authorized License is required for every 3 Limited Use licenses.
At least 1 Full Authorized License is required for every 25 Express Use licenses.

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Maximo Entitlement Details – Modifications as of Sept 2012

1. **SR/DR Licenses no longer require entitlement**
   – Increases Maximo use
   – Reduces Administrative overhead

2. **Limited Use Licenses available for Industry Solutions**
   – Extend use of Industry Solution capabilities
   – Trade-up part numbers now available for Limited Use Industry Solutions

3. **Express Use License to address Technician and Management use cases**
   – Allows managers/supervisors read-only and reporting access across the system and status change rights
   – Allows technicians to update work orders assigned to them
   – 25:1 (Express to Authorized) ratio
   – Available for core, industry solutions and some add-ons.

1. Self Service Requestor/Desktop Requisitions (SR/DR)

- **License Changes**
  - Individuals that are using the Program solely for the following purposes or are using only the following functions of the Program do not require entitlements to the Program:

    Entering service requests and viewing the status of their service requests. Viewing information on assets they own. Creating and viewing requisitions, viewing templates and viewing drafts via the Desktop Requisitions application.

- Viewing assets they own includes any assets that are available to that user through security rights.

2. Limited Use User for Industry Solutions

- Language Added to all Industry Solution Licenses: If the Program is designated as "Limited Use User", Licensee cannot use more than three (3) modules within the IBM Maximo Asset Management program, excluding the Administration, Integration, Security, and System Configuration modules, <u>per Licensee's Enterprise</u>.

- Select from all but Administrative Modules: Assets, Change, Contracts, Financial, Inventory, Planning, Preventive Maintenance, Purchasing, Release, Service Level, Task Management, Work Orders

- Industry Solution Modules can be selected
  - Nuclear - Configuration Change, Operational Management, Permits
  - Utilities – Compatible Units
  - Oil & Gas - Change, Operations, Service Desk
  - Transportation – Consists, Data Import, Motor Pool, Warranties, Maintenance Codes

- 3:1 (Limited to Authorized) Ratio

- Limited Use users also have access granted by an Express user

3. Express Use User

- Intended for:
  - Managers/Supervisors for viewing information and making approvals.
  - Technicians/Field workers who are performing maintenance and need to look at WO tasks, update failure codes, post actuals and change status.

- License Changes
  - If the Program is designated as "Express Use User", Licensee is entitled to access the Maximo Asset Management program solely for the purpose of running and viewing reports, read only view of records, approval of records and updates to Work Orders that have been assigned to the Licensee.

- Express users can make updates using the Work Order Tracking, Quick Reporting, Activities and Tasks or Labor Reporting applications.

- "Assigned" can be based on Supervisor, Labor, Craft, Lead, Crew, Work Group, Crew Work Group, Owner, Owner Group, Service, Service Group or Self-Assigning (eg. selecting 'next' work order from queue)

- 25:1 (Express to Authorized) Ratio

Express Entitlement

- Clarifying Language in the online license usage guidelines (http://www-01.ibm.com/software/tivoli/products/usage.html)

- Access rights
  - All Maximo Industry Solutions
  - IBM Maximo Asset Configuration Manager
  - IBM Maximo Linear Asset Manager
  - IBM Maximo Service Provider

- Add-on products that require specific entitlement for use with a Maximo Express License:
  - IBM Maximo Spatial Asset Management (excluding Utilities)
  - IBM Maximo Calibration (excluding Nuclear or Life Sciences)
  - IBM Maximo Mobile
  - IBM Maximo Everyplace

View of 7.5 License Metrics

	Authorized			Asset	Install	Server
	Authorized	**Limited Use**	**Express User**			
Maximo Asset Management	X	X	X			
Maximo Industry Solutions	X	X	X			
Maximo Add-ons	X					
Asset Configuration Mgr	X			X		
Spatial/Internal Service Provider	X				X	
Adaptors	X					X
Mobile Object Access	X					

KEY [   ] = New Type

Questions?

FAQ for Express Use License

- **Q: What applications can Express users change status in?   Just Workorders?**
  - **A:** No, it's not just workorders. A status can be changed in any application that has a status, like PR, PO, WO or any industry solution application or add-on application.

- **Q: The language states 'updates to work orders assigned to the licensee' - PM's and other work orders are often assigned to a craft or crew or a manager/supervisor who will then assign the work to one of their crew members. Is this still covered as an Express User?**
  - **A:** Yes, the language 'assigned to the Licensee' does not have to mean an individual; it can be a craft or crew.

- **Q: Can Express users create new WO's when it is follow-up work?**
  - **A:** Yes

- **Q: Does the express license enable a user to create a new work order via Quick Reporting (i.e. the mechanic has been assigned to the job (in real life, not in yet Maximo), carried it out, but needs to report his findings after the fact by reporting it in Quick Reporting (no SR or Work order is created prior to the work)**
  - **A:** Yes

- **Q: Can that follow-up WO be created for the original asset the WO/PM was intended for but also any other related asset in or around the original asset?**
  - **A:** Yes

- **Q: Are the ratios a minimum requirement?   Do I need to sell no less than 25 express users for every authorized?**
  - **A:** No, the ratio is a ceiling, not a minimum.

FAQ for Express Use License

- **Q: The ratios of 25:1 for express and 3:1 for limited use…can a single full use license be used as the basis for both or do they need to be separate?   Do I need 2 authorized, one for the 3 limited and 1 for the 25 express?**
  - **A:**   No, a single authorized license can be applied to both.   One authorized, 3 limited and 25 express.

- **Q: Does the express license give the user access to Labor reporting (and thereby post hours against work orders)**
  - **A:** A technician can update WO's assigned to them using the Work Order tracking application, Labor Reporting, Quick Reporting, Activities and Tasks, or a clone of one of those applications.

- **Q: Can an Express user enter meter readings?**
  - **A:** YES, through one of the work order applications.

- **Q: Can an Express user move/modify Assets?**
  - **A:** YES, through one of the work order applications

- **Q: Can an Express user enter failure codes?**
  - **A:** YES, through one of the work order applications

FAQ for Express Use License

- **Q: Can an Express user build out job plans?**
  - **A:** No

- **Q: Maximo for Service Providers has a "license sync" for the number of Authorized/Limited Maximo users, do we need to apply this sync also on the number of Express Users ?**
  - **A:** No, no license sync required for Express users

- **Q: Can the Maximo Spatial Add-on license be sold as an add-on to an Express users?**
  - **A:** Yes, as long as they are accessing Maximo under the guidelines of Express usage.

- **Q: Can the Maximo Calibration Add-on license be sold as an add-on to an Express users?**
  - **A:** Yes, as long as they are accessing Maximo under the guidelines of Express usage.

- **Q: Can Express Users access data from Industry Solutions, and Linear?**
  - **A:** Yes, as long as they are accessing Maximo under the guidelines of Express usage.