

# Maximo 2018-2019 Completed Projects

## Completed March 2019

**Finance support: Create rules in Maximo that would prevent certain types of labor transactions to be saved.** Rules are needed to prevent transactions with a Start Date far in the future or far in the past. Having these rules in Maximo will prevent transactions from being entered in financial periods far outside of the current financial period, because when hours are entered far outside the current financial period, it misrepresents the labor hours in the current financial period, which affects financial budgeting reporting. Another rule that is needed is to prevent saving labor transactions greater than a specified number of regular or OT hours in one transaction. This is to prevent incorrect hours from being saved on WOs, thus decreasing the need for correcting entries or transfers. Ticket INC000002012491

**Supporting criteria:**

- High potential savings
- User impact/high customer satisfaction potential
- Project was 30% complete prior to working on the upgrade and then put on hold until after the upgrade.

## Completed February 2019

**User Experience: Make various enhancements in EZMaxMobile to reduce clicks, display helpful information, and promote ease of use.** Enhancements to include: 1) When adding a new row on Material Requisitions, change functionality so the Line Type defaults to "Material" instead of "Item". MRs for the Line Type "Material" are submitted more often than for specific Item numbers in the Item Master list, so this will reduce clicks for a large number of users. 2) On Consumables (Favorites) Lists, add the ability to filter by an Item # or a Description. This will eliminate scrolling through large lists in order to find a particular item to add to a MR. 3) On the Work Order Screen, add the "Spare Parts" button when the WO is written to an Asset. This button is currently displayed on the Assets screen; displaying it in this new location will reduce clicks and increase visibility. 4) Create buttons to view Saved Material Requisitions, Open Material Requisitions, Pending Orders, and Placed Orders for a particular WO on the WO screen. This will allow users to easily view order status and order details on specific WOs. 5) Sort Work Logs from newest to oldest, prior to this change Work Logs were not sorted in any particular order. Tickets INC000001882265, INC000001743408, INC000002328037, INC000002428459, INC000002434048

**Supporting criteria:**

- User impact/high customer satisfaction potential
- Maximum use of existing technology
- Existing project support (Jan/Feb EZMaxMobile Trainings)

## Completed November 2018

**Accessibility: Modify attachment icons in various Maximo applications.** Currently, the icon for adding an attachment and the icon that indicates an attachment exists on a record can be difficult to see, due to its size and light color. This impacts all users of Maximo, as users may be unaware of their ability to create an attachment or that an attachment exists on a record that they may need to reference. A successful solution would be to display an icon that is both larger in size and brighter color. Ticket INC000002301423.

**Supporting criteria:**

- User impact/high customer satisfaction potential
- Minimum impact on other processes
- Ease of implementation

# Maximo 2018-2019 Completed Projects

## Completed October 2018

### **Streamlining/FM Procurement Support: Add Vendor smart search capability in Maximo Desktop**

**Requisitions.** In Maximo Desktop Requisitions, when the user clicks "Select Value" from the Vendor field, if the user doesn't type the vendor description in exactly the way it is listed, the vendor does not come up in the search/filter. This impacts FM Procurement as it makes it difficult to find a vendor in the system. A successful solution would provide the ability to search vendors if only part of the vendor description is typed in a filter box. Ticket INC000002301636. This was resolved with the use of wildcards in Maximo search

#### **Supporting criteria:**

- User impact/high customer satisfaction potential
- Minimum impact on other processes
- Ease of implementation

**Bugs/issues since the April 2018 upgrade: Fix performance issues** when performing certain actions and with interfaces from other systems. Fix issues where Maximo email communications are randomly not being sent out. These issues are being address with changes to user-interface and utility servers. Ticket INC000002238323.

#### **Supporting criteria:**

- User impact/high customer satisfaction potential

### **Planning & Scheduling Project Support: Test a calendar view that InterPro Solutions (vendor) has available for EZMaxMobile.**

The user who is signed in should be able to tap on a particular day, and a list of WOs would be displayed where the Scheduled Start Date for their Labor Assignment is for that day. Then, the user could tap on a particular WO and it would open the WO. This would allow the tradespeople to sort by scheduled start date of their labor assignment so they could view their schedule in date/time order in EZMaxMobile in lieu of using a printed copy of their schedule. Ticket INC000002255545.

#### **Supporting criteria:**

- Existing project support
- High streamlining improvement potential
- Maximum use of existing technology
- Minimum impact on other processes

### **Streamlining Project/FM Procurement Support: Setup and load Grainger Vending Feed into Maximo**

via provided Excel file. Now, trades wants something out of vending machine. Type in WO #, and other info, take stuff needed. Middle of the month, Grainger sends spreadsheet with data person, WO, unit information. Procurement representatives currently reviews all of the transactions, manually creates the material charges on billable WOs into Maximo, and charges the Maintenance Account for consumable orders. This process takes approximately 8 hours per month. A task will be created to pull in the information automatically into Maximo. Ticket INC000001673050.

#### **Supporting criteria:**

- High potential savings
- High streamlining improvement potential
- Project was 50% complete prior to working on the upgrade and then put on hold until after the upgrade.

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**Streamlining/EZMaxMobile User Support: Remove completed Child Work Orders from the user's Work Order List in EZMaxMobile.** Currently, when tradespeople are assigned to a Parent WO, all of the child work orders are displayed in their WO list until the Parent WO is completed, even if the user has completed their assignment(s) on some of the children WOs. With this change, when the user has completed their assignment(s) on children WO(s), those WOs would no longer show in their child WO list. This will help the user track what work they have completed and what they haven't, and they will not need to scroll through all of the children WOs they have already completed to determine the remaining work to be done. Ticket INC000002275178.

**Supporting criteria:**

- High streamlining improvement potential
- User impact/high customer satisfaction potential
- Minimum impact on other processes

**Streamlining/Data Clean-up: Make aesthetic and field changes to the Facility Coordinator Database in the Maximo Locations application.** These changes involve narrowing column widths to reduce scrolling needed to see all of the data, eliminating the need to type free-form text, and providing clean, searchable data. Summary of changes 1) Column sizes are sized more appropriately for the content displayed. 2) When a "Responsibility Level" is chosen, the Resp. Level Description will automatically populate in the adjacent column. 3) The Responsibility Description field was changed from a free-form text field to a field with Drop Down choices for selecting. Ticket INC000002030128

**Supporting criteria:**

- User impact/high customer satisfaction potential
- Project was 75% complete prior to working on the upgrade and then put on hold until after the upgrade
- Ease of implementation

### Completed September 2018

**Reporting: Update Maximo reports to accurately show work logs made against a task.** This will allow for reporting to display comments bound to a specific reading on that task. Recent changes in Maximo now appropriately show work logs made against a task either in Task Readings or directly on the Task. This change will allow accurate Condition Monitoring reporting to display data at the relevant level. Ticket INC000002295386.

**Supporting criteria:**

- Existing project support
- Maximum use of existing technology

**Streamlining/UFR Support: Add a notification on Service Requests for assets under warranty.** In the Work Order Tracking application, when a Work Order is created with an Asset associated to it that is under warranty (has a Warranty date in the future), a "caution" triangle icon appears, with a message about the warranty. However, this notification does not currently appear in the Service Request application under the same circumstances. This impacts UFRs entering SRs for particular assets, as having the warranty notification may be helpful in their decision to submit the SR. A successful solution would display the warranty message on SRs at the time an asset number with a future warranty date is added to the SR. Ticket INC000002313680.

**Supporting criteria:**

- Maximum use of existing technology
- User impact/high customer satisfaction potential
- Minimum impact on other processes
- High streamlining improvement potential

## Maximo 2018-2019 Completed Projects

**Streamlining: Add GL Accounts to CC Asset Locations** in Maximo. This is the final stage of a project to add GL Accounts to all Maximo Asset Locations. Endowed and SCL Asset Locations were completed in 2017. Currently, when SRs are created for CC Locations in Maximo, the Maintenance GL Account does not automatically populate, since most CC Asset Locations do not have a GL Account populated. This affects UFRs in that they must manually enter the Maintenance GL account for all SRs for maintenance work before workflowing a SR to FCS. A successful solution will allow the auto-population of the Maintenance GL Account on SRs when the CC Location is entered. **Selection criteria:** Existing project support, High streamlining improvement potential, maximum use of existing technology, minimum impact on other processes. Ticket INC000002257135.

**Supporting criteria:**

- Existing project support
- Maximum use of existing technology
- User impact/high customer satisfaction potential
- Ease of implementation
- Minimum impact on other processes

**Billing support: Create rules that prevent any type of charge (labor, material, service, or tool) to be saved on a Parent WO** in Maximo. GL Accounts are typically not on parent WOs, so if there are charges entered and saved on Parent WOs, errors occur with the billing system, preventing billing to run until it is fixed. There is currently a rule in EZMaxMobile that prevents transactions to be saved on Parent WOs. The proposal is to create a rule in Maximo that prevents charges from being saved on Parent WOs when the Parent WO was created from a Route on a PM. A rule must also be created to not allow MRs, PRs, POs to be created on a Parent WO that was created from a Route on PM. In either case, if a user tries to do what is prevented, an error message will also be displayed. Problem Statement: The problem of charges being entered on Parent WOs affects finance and facility stakeholders. When finance runs billing, and charges are on a Parent WO and a GL account is missing on the Parent WO, it prevents billing from running, and time must be spent researching where the costs must be allocated. This problem also affects facility stakeholders in that they aren't seeing correct costs on assets and locations in their facility(s) when the charges are billed on the Parent WO. The impact is costs are not being tracked against the appropriate asset or location. A successful solution would allow a more efficient way to enter costs against the appropriate asset or location. Ticket INC000002223194.

**Supporting criteria:**

- High potential savings
- High probability of quick results

### Completed July 2018

**Enhancement/Streamlining: When tapping on the "Divided Route" button in EZMaxMobile, show all stops on one page instead of having multiple pages.** This will eliminate the need to scroll to the bottom of the page in order to click the "next page" button to select more route stops. Streamlining this process makes sense as the number of divided routes is increasing for like-work (exhaust fans, fan coils). Ticket INC000001917209

**Supporting criteria:**

- User impact/high customer satisfaction potential
- Maximum use of existing technology
- Ease of implementation

## Maximo 2018-2019 Completed Projects

**Reporting: Update EZMaxMobile functionality so that when a work log is made against a task (either in Enter Task Readings or directly on the Task), it creates a log on the task work order.** This will allow for reporting to show comments made to a task and be bound to a specific reading on that task. The Condition Monitoring OBIEE model allows for reporting on observations made against the task WOs, but the logs are now only showing on the parent WO in Maximo. With this change, Maximo out of the box logic will display (roll up) the logs from the task work orders to the associated work order. This change will allow accurate Condition Monitoring reporting as it would display data at the relevant level. Ticket INC000001307808

**Supporting criteria:**

- Ease of implementation
- Maximum use of existing technology
- High probability of quick results

**Streamlining/Data Clean-up: Create a new site in Maximo Test, document procedures.** Determine what is shared with the CORNELL site, and what isn't. Review all queries, CU reports, automation scripts, cron tasks & workflows to see what is site specific. Determine if and where it is hard coded, create a parameter for site. Review where Site ID exists in the database and make sure it is populated where it should be. See if a default site has been set in the database. This will facilitate implementations of Maximo for Cornell organizations outside of FCS. Ticket INC000001819593.

**Supporting criteria:**

- User impact/high customer satisfaction potential
- Maximum use of existing technology
- High streamlining improvement potential

**Billing support: Turn billing back on for trades labor against CM/PM account** (reversing changes made with Project Monarch). This will save approximately 4 hours a week and reduce the risk of errors. When Project Monarch was implemented for FY17 (which was to turn off the billing for EN & SCL labor transactions against the CM/PM account, in an effort to reduce internal billings), many of the accounts were also modified. This time, accounts will not need to change. At that time, mark-up was changed from 17% to 0%. This time, mark-up will remain at 0%. The proposal is to turn this billing back on to begin billing the first month of FY19 (July 2018). Current state: On WOs where the GL Account is the CM/PM maintenance account, EN & SCL labor do not bill, but CC labor bills, and all materials bill. The problem we are trying to solve: There is not an easy way to get P/L reports, now that some CM/PM labor transactions are billed, and others aren't. In KFS, Finance can't run one P/L report for FM, they have to get the data from various sources and consolidate it. Hours are tracked against the CM/PM account and can be reported on through Maximo reporting, but you have to make sure you are looking at the right data (billed = departmental, unbilled = CM/PM, do not include CC labor). This increases risks of errors since people need to be very careful about queries they are running in order to not duplicate any transactions, while making sure everything that should be included is included, in order to create a combined report with KFS data. Ticket INC000002256445.

**Supporting criteria:**

- High potential savings
- High streamlining improvement potential
- Ease of implementation
- Minimum impact on other processes

# Maximo 2018-2019 Completed Projects

## Completed June 2018

**Customer support: Revise the wording in the automatic email from Maximo when a SR is cancelled** to clarify who cancelled the SR or clarify that the UFR listed is the Primary UFR, not necessarily the UFR who cancelled the SR. Currently, the email only provides the Primary UFR information, but doesn't indicate it is the primary UFR, which can be confusing to the customer. Ticket INC000002228029.

**Supporting criteria:**

- User impact/high customer satisfaction potential
- Ease of implementation

**Audit: Create a Job Plan Variance report in Maximo.** This report will compare hours on Job Plans to actual hours on Work Orders that reference those Job Plans. Having this information will provide us with the ability to create new job plans and modify existing job plans to reflect more accurate hours needed to perform the work. This will benefit FM's Planning and Scheduling initiative as it will allow more accurate scheduling to take place. Ticket INC000002065675.

**Supporting criteria:**

- Existing project support
- Maximum use of existing technology

*\*Criteria for selecting active projects:*

User impact/high customer satisfaction potential; Maximum use of existing technology; High potential savings; High streamlining improvement potential; Minimum impact on other processes; Existing project support; Ease of implementation; High probability of quick results; Projects that were in progress and then put on hold in late 2017 due to upgrade efforts (and determined there is still a need).

Bug fixes and smaller tasks, such as minor configurations or setting changes will be merged with the larger projects above. As each project nears completion, other open Remedy tickets will be re-evaluated, and active projects will be determined based on the supporting criteria and timelines of other active projects, input from stakeholders and the Core User Group, and high-level direction and prioritization from the Maximo Steering Committee.