

maximo enterprise suite

Maximo

Product Description Guide

mro software™

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This guide is intended to provide you with a description of the modules and applications that are delivered in Maximo, one of the Maximo Enterprise Suite of products.

A number of applications and modules have been added to Maximo to enhance the experience and benefits of traditional EAM users.

This guide is provides a brief description of each application, organized by module name.

Administration:

- **Organizations** – Used to setup the organizations and sites to be used within Maximo.
- **Classifications** – Used to create classifications and establish an overall classification hierarchy.
- **Bulletin Board** – Used to create, post and view messages as well as to broadcast information to users of the Maximo system.
- **Communication Templates** – Used to create and manage generic communication templates that Maximo users can leverage to standardize frequently used e-mail communications (also known as notifications).
- **Calendars** – Used to indicate working time for equipment, craft and labor records for an organization and its associated sites.
- **Sets** – Used to create a framework for sharing item and company (vendor) data across multiple organizations.
- **Work View** – Used to make queries available for display in the Result Set portlet of a Maximo user's Start Center.

Assets:

- **Assets** – Used to store asset numbers and corresponding information such as parent, location, vendor, up/down status, and maintenance costs for each asset.
- **Locations** – Used to enter and track locations for assets and organize these locations into logical hierarchical systems or network systems.
- **Meters** – Used to add or modify meter definitions. Meter definitions include names for the meters as well as sets of attributes that describe the meters.
- **Meter Groups** – Used to define a logical grouping of meters that will exist in a meter group. Meter groups represent a collection of meters that will be used together multiple times.
- **Condition Monitoring** – Used to define unlimited measurement points for assets, and to specify alarm limits and associated work to be performed after reaching those limits.
- **Failure Codes** – Used to build and display failure hierarchies, which help you construct accurate histories of the failures that affect your assets and operating locations.

Configuration:

- **Domains** – Used to maintain lists of defined values that appear in drop-down lists (sometimes referred to as value lists).
- **Database Configuration** – Used to create or modify the objects and attributes used by Maximo applications.
- **Application Designer** – Used to create new applications (clones and custom applications) or to tailor the pages of an existing Maximo application.
- **Cron Task Setup** – Used to manage cron tasks. Cron tasks are behind-the-scene jobs set to run automatically and on a fixed schedule.
- **Workflow**
 - **Workflow Designer** – Graphical application that is used to create a series of paths for records to flow through, called a workflow process.
 - **Roles** – Used to manage roles within Maximo.
 - **Workflow Administration** – Used to view and modify assignments within Workflow, Escalation and SLA processes.
 - **Actions** – Used to manage the administrative functions of creating actions and action groups within Workflow, Escalation, and Service Level Agreement (SLA) processes. Actions are scheduled events that occur when a record leaves a Workflow node.
- **E-Mail Listener Configuration** – Used to receive and process incoming e-mail messages.
- **Escalations** – Used to automatically monitor critical processes across your enterprise. The primary goal of Escalation Management is to ensure that critical tasks are completed on time, such as those defined in service level agreements.

Contracts:

- **Purchase Contracts** – Used to create, modify, and view contracts with outside vendors.
- **Lease/Rental Contracts** – Used to define the overall terms and conditions of the agreement between a vendor and a customer regarding one or more rotating assets.
- **Labor Rate Contracts** – Used to define multiple labor rates for specific crafts and skills, and optionally labor records. Within the Labor Rate Contract application you can manage outside labor and the corresponding rates.
- **Master Contracts** – Used to associate many contract types for a particular vendor. A Master Contract defines the relationship with a vendor and contains terms and conditions that apply to the contracts created and listed under it.
- **Warranty Contracts** – Used to maintain one or more assets for an outside service provider for a fixed fee, or regularly scheduled payment over a time period; or to track warranty information for multiple assets or locations by time or meter.
- **Terms & Conditions** – Used to maintain a library of terms and conditions that can be added to a purchasing document or contract. These terms can contain information such as liability concerns, shipping and handling details, or delivery time expectations.

Financial:

- **Chart of Accounts** – Used to establish general ledger (GL) account fields in Maximo with definitions equivalent to those used with the rest of your financial data processing system.
- **Currency Codes** – Used to define currency codes and to specify which codes can be used in Maximo.
- **Exchange Rates** – Used to set up exchange rates used for converting currencies in Maximo.

Inventory:

- **Item Master** – Used to define items that will be stocked in your storerooms. You group these items in an item set, which can then be shared by the organizations using that item set.
- **Service Items** – Used to define and manage purchased services.
- **Tools** – Used to manage information about the tools used to perform work. Tools are typically non-consumable items for which you charge an hourly rate for their use.
- **Stocked Tools** – Used to manage existing tools in storerooms.
- **Inventory** – Used to enter, display and update information on each inventory item.
- **Issues & Transfers** – Used to issue or transfer items from storerooms, or to return items to storerooms.
- **Condition Codes** – Used to create and maintain a master list of condition codes for a particular item set.
- **Storerooms** – Used to add and maintain information about storeroom locations, as well as view the items stocked within a storeroom.

Planning:

- **Job Plans** – Used to create a detailed description of how a job is to be performed.
- **Safety Plans** – Used to create a detailed plan of how to service assets or locations safely.
- **Routes** – Used to list related work assets that are considered “stops” along an inspection or maintenance route.

Preventive Maintenance:

- **Preventive Maintenance (PM)** – Used to create, modify and view preventive maintenance plans for work assets. PM records are templates for work orders or for other PMs.
- **Master PM** – Used to create and modify master PMs, which are templates for other PM records.

Purchasing:

- **Purchase Requisitions** – Used to ask the purchasing department to order materials or services.
- **Purchase Orders** – Used to purchase materials or services from an internal supplier or an external vendor.
- **Receiving** – Used to receive materials into inventory and record the receipt of services.
- **Invoices** – Used to record invoices and match against purchase orders and receipts for approval.
- **Request for Quotations** – Used to request and manage vendor quotations.
- **Companies** – Used to manage data on manufacturers, vendors, and other companies that do business with you.
- **Company Master** – Used to create company master records that belong to a particular company set.
- **Terms & Conditions** – Used to maintain a library of terms and conditions that can be added to a purchasing document or contract. These terms can contain information such as liability concerns, shipping and handling details, or delivery time expectations.

Reporting:

- **KPI Manager** – Used to create Key Performance Indicators (KPIs) to track critical performance variables over time.
- **Report Administration** – Used to create reports, generate and preview request pages, add parameters, display reports as toolbar icons, email reports, or specify a schedule for running a reports.

Resources:

- **People** – Used to maintain records of people.
- **Person Groups** – Used to maintain person groups. A person group consists of people, who may or may not be workers.
- **Crafts** – Used to maintain craft records.
- **Labor** – Used to maintain labor group records.
- **Qualifications** – Used to create qualifications and certification requirements for qualifications.

Safety:

- **Safety Hazards** – Used to define hazards that exist in the workplace and associate related safety precautions.
- **Safety Precautions** – Used to define precautions that can be taken against hazards in the workplace.
- **Lock Out/Tag Out** – Used to create a detailed description of how to take work assets out of service or how to place them back in service, to ensure a safe work environment.
- **Safety Plans** – Used to create a detailed plan of how to service assets or locations safely.

Work Orders:

- **Work Order Tracking** – Used to plan, review, and approve work orders for assets and locations.
- **Labor Reporting** – Used to report the type and total number of hours of work that was performed by external contractors or internal employees.
- **Quick Reporting** – Used to report work on open work orders or small jobs.
- **Assignment Manager** – Used to dispatch urgent work and schedule future work requirements.
- **Service Requests** – Used to create, view, and resolve service requests from customers.

Self-Service/Service Request:

- **Create Service Requests** – Used by self-service users to create new service requests.
- **View Service Requests** – Used by self-service users to view existing service requests.

Security:

- **Security Groups** – Used to grant access to sites, applications and menu options. A user is assigned to one or more groups to gain access to the system.
- **Users** – Used to add and manage Maximo users.

Maximo Options:

Desktop Requisitions:

- **Create Requisition** – Used to create a new desktop purchase requisition.
- **View Requisition** – Used to view existing purchase requisitions.
- **View Templates** – Used to view a requisition that was previously saved as a template.
- **View Drafts** – Used to view a requisition that was previously saved as a draft during the create requisition process.

Maximo Enterprise Adapter – Used to generate integrations and web services for Maximo.

Maximo ERP Adapters (Oracle or SAP) – Used to integrate Maximo to Oracle or SAP systems.

Maximo e-Commerce Adapter – Used to enable buyers to dynamically collaborate with their suppliers, partners and electronic marketplaces.

Maximo Mobile Suite – Used to provide workers access to Maximo remotely from hand-held computing devices.

Maximo Calibration – Used to manage the calibration of test and measurement instrumentation.

Maximo Navigator – Used to accelerate the ability to locate and identify needed parts.

Maximo Project Manager – Used to enable planners/schedulers to manipulate Maximo data within Microsoft Project.