HANDY WORKFLOW CONFIGURATIONS

Best Practices and Recommendations

Presented by Stephen Hume, MaxTECH Chair

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Stephen Hume

Stephen has been working with IBM Maximo for over ten years in a variety of industries (Oil and Gas, Utilities). He has taught Maximo courses to end users for both Technical and Functional audiences and chairs the MaxTECH User Group.

Background

Over the course of 10+ years of working with Maximo, I have created, updated, redesigned and implemented several complex workflows for both work orders, procurement, incident management, inventory, assets, PMs and custom applications in Maximo.
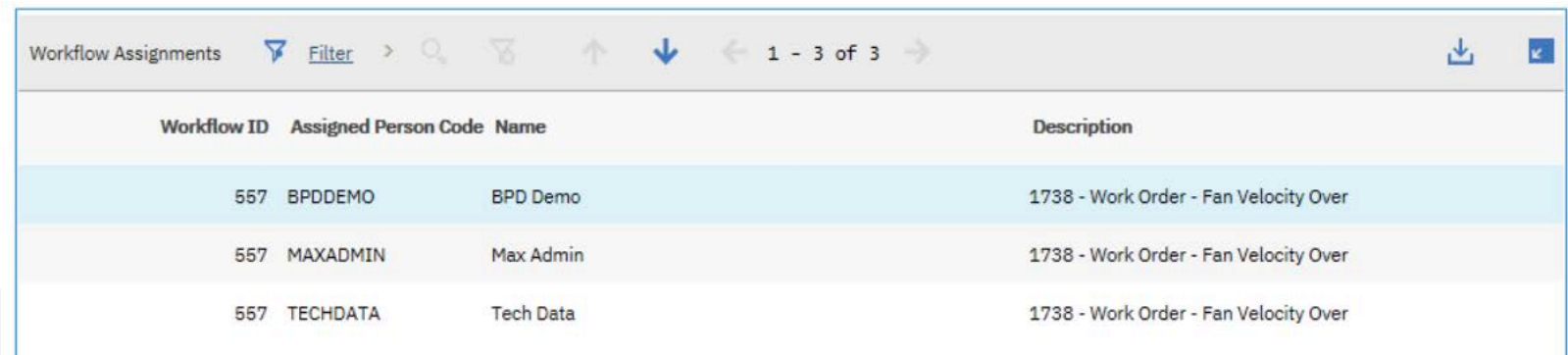
During that time. I have found some very worthwhile configurations that have helped business users adopt the workflows and business processes more readily.

This presentation will highlight some of those key configurations.

Assignments in a Table

In one scenario, the users would often need to view the workflow assignments in order to see who was currently assigned to a work order. Rather than taking several mouse clicks to view the workflow assignments dialog, a table was added to the very bottom of the Work Order main tab which would show whoever is currently assigned to the workflow.

One useful thing which was displayed in this table was the Workflow ID which makes filtering for the workflow in the Workflow Administration application much simpler. If there were no active workflow assignments, this table would be empty.

Workflow ID	Assigned Person Code	Name	Description
557	BPDDEMO	BPD Demo	1738 - Work Order - Fan Velocity Over
557	MAXADMIN	Max Admin	1738 - Work Order - Fan Velocity Over
557	TECHDATA	Tech Data	1738 - Work Order - Fan Velocity Over

How to Set it Up

How to set it up:

1. Open WOTRACK in application designer, click on the work order main tab, scroll to the bottom and add a new section, as well as a table in that section.
2. In the table add three additional table columns.
3. For the properties of the table give it the title of Workflow Assignments and put WFASSIGNMENT in the Relationship field. Also make the input mode for this table "read only".
4. The four attributes to display (from left to right) are WFID, ASSIGNCODE, ASSIGNEE.DISPLAYNAME, DESCRIPTION.

There are other attributes in the workflow assignment table that you might want to display; the four above are the most common requested by users.
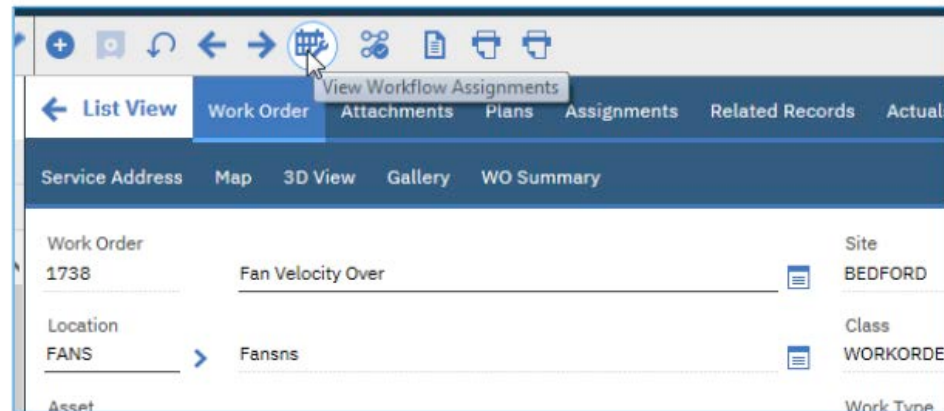
Add a Show Assignments Button

Another alternative to showing workflow assignments in a table in the application is to add a toolbar button which with one click will show the workflow assignments dialog. This option is a little easier for the user to use than trying to go through the select action menu to see the same dialog.

How to Set it Up

1. In application designer in the wotrackapplication select action add/modify toolbar menu.

2. Add Option ASSIGNWF at position 37, sub position 0, an image to associate with this option is nav_icon_assignlabor.gif. Also make sure that you select MAIN as the tabs for this option.

3. Doing this alone will not result in the Icon appearing in the work order application. It is necessary to add this option to a system property as well. In the System Properties application, find the property mxe.webclient.show on Toolbar, then add ASSIGNWF to the list of events that can be shown on a toolbar. Save your changes and do a live refresh.

Now when you go to the work order application, you will see the icon which looks like a building and a wrench, which when clicked will show the workflow assignments dialog for the work order.

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Re-Assign to Me (Override WF Assignments)

For another organization, the Maintenance Managers wanted to have the ability to override workflow assignments so that they would not need to contact IT support every time they needed to take over a person's workflow assignment.

This was done by adding a toolbar button to the work order application which would override all active workflow assignments with the person who clicks the button.

How This Was Set Up

1. Create a new workflow for the work order object. It is a simple workflow with just a single action
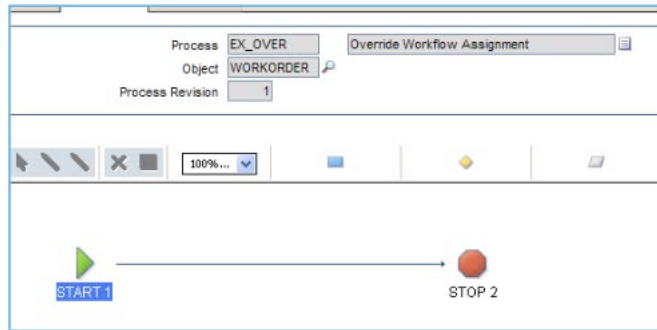
2. An action also needs to be created with the following information.Type: Set ValueValue: &personid&Parameter/Attribute WFASSIGNMENT.assigncode

3. Attach the action to the line in the workflow

4. Save the workflow and edit workflow go buttons to add the new workflow to a separate button.
    Example: Application: WOTRACK Process Name: EX_OVER (or whatever you have called the workflow process)
    Description: Override Workflow Assignment, Toolbar Icon: nav_icon_assignlabor.gifActive Icon: nav_icon_assignlabor_disabled_active.gif

How This Was Set Up

Note: with this solution all active workflow assignments are assigned to the person who clicks the icon. This can end up with multiple assignments for the same work order for the same person, but the users were satisfied with that solution.

Creating Re-enterable Workflows

Firstly, for this topic to make sense, you will need to know what I mean by 're-enterable'. What I mean is that the workflow can be stopped and restarted, and when it restarts it will go to the correct spot in the workflow.

The way this came about was a project I was working on where the work order workflow was well set up from start through finish, assuming that nothing ever went wrong, and the workflow would never need to be stopped for any reason whatsoever. In that case, when the route workflow icon was clicked for the "stopped workflow", the system did not know where to place the work order in workflow, so it just fell through to the end of the workflow and did nothing.

The way to make the workflow "re-enterable" is to add a set of status checks to the workflow, and when certain statuses are encountered place the work order in the correct spot.

Creating Re-enterable Workflows

- The screenshot on the left is of a well-structured Maximo workflow. It has the status checks down the left-hand side, and then to the right of each status - the actions required for that place in the business process.

- Also note, this model does not use workflow assignments at all, so has built in logic to check that the correct person, or correct group of people are workflowing the object at that particular status.

- This status-based workflow design will work with or without using workflow assignments.
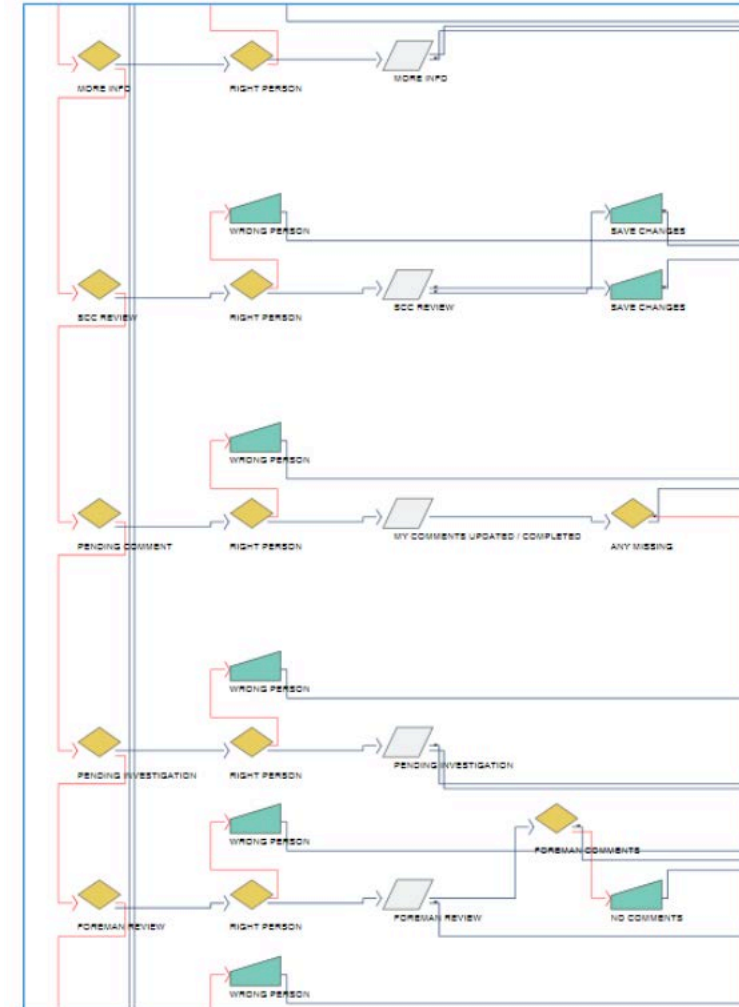
Workflows Without Assignments

In the previous configuration, a workflow that did not use assignment nodes was shown. The benefit of using this option is that multiple people can be responsible for moving the object through the business process. Also, it means that if a person is on leave, or has left the company, there will not be a slew of workflow assignments that need to be given to someone else.

Converting a workflow that has assignments (using Task Nodes) to one that does not use task nodes is not a simple thing to achieve, but once completed, it can make the business much happier with the flexibility.

Note: Instead of using the INBOX on a Start Center to view workflow assignments, resultsets are added to the start center breaking the work orders into their status groupings.
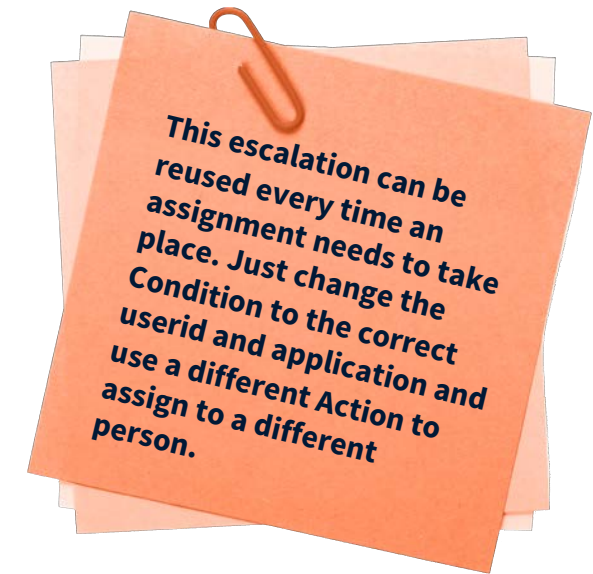
Reassign Workflow Assignments Using Escalation

If people never left an organization or never changed jobs at a company then there would never be any need to re-assign workflow assignments from one person to the next.

In the past, it has always been an arduous manual task of identifying all the workflow assignments for the person that has left. Finding out who they should now be assigned to and then using the workflow administration application to go through all the active workflow assignments one at a time to do the re-assignment.

There must be a better way! Fortunately, this can be done with an escalation and an action. The Escalation will only need to run once as it will update all active assignments.

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How this can be Achieved

1. Create an action to set the value of the assign code to the new userid

   Action: XXXWINS.   reassign to WINSTON
   Object: WFASSIGNMENT
   Type: Set Value
   Value: 'WINSTON'
   Parameter/Attribute: assigncode

2. Then create an escalation to run 1 time (after it runs just de-activate it).

   Escalation: XXXWFREASSIGN –reassign workflow assignments
   Applies To: WFASSIGNMENT
   Condition: WFID != 0 and assignstatus= 'ACTIVE' and assigncode= 'WILSON' and app = 'WOTRACK'
   Schedule: 1m
   Escalation Points, click new row but do not enter anything
   Actions: New row add XXXWINS.

3. Activate the Escalation and when it has run, deactivate it. All of WILSON's work

   order workflow assignments will now be assigned to WINSTON.

This escalation can be reused every time an assignment needs to take place. Just change the Condition to the correct userid and application and use a different Action to assign to a different person.

Display Last Workflow Memo in Application

In the past, workflow memos have been recorded by people, but to find the memo meant going through the workflow history, opening each line up to see if there was a memo or not. In the case where there were tens or even hundreds of workflow events in the history, it was difficult if not impossible to find the Memo, let alone make sure it was the latest memo to be entered.

I recently came across this solution at one shop where they had done a simple configuration which would show in the work order application the latest workflow memo, even if the workflow assignment had been completed.

Last Workflow Memo: NO LONGER MAINTAINING ASSET
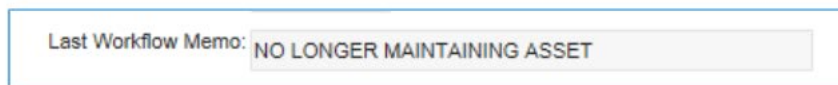
How this can be Implemented

1. Go to the database configuration application and add the following relationship to the workorder object.
   - Relationship: LATESTWFMEMO
   - Where Clause: ownertable= 'WORKORDER' and ownerid= :workorderid and memo is not null and transid in (select max(transid) from wftransactionwhere ownerid= :workorderid and memo is not null)
   - Child Object: WFTRANSACTION
   - Remarks: Get just the latest workflow message for the work order.

2. Then in application designer for the WOTRACK application add a text field to the work order main tab (wherever you would like the memo field to appear.
   - Attribute: LASTWFMEMO.MEMO
   - Label: Last Workflow Memo
   - Input Mode: Readonly

Last Workflow Memo: NO LONGER MAINTAINING ASSET

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Add Colors to your Workflows

*** WARNING *** There are actions for this bulletin which have not been completed.You can decide with the next workflow action how you wish to proceed.
<b> Hit the Workflow Icon again to make your choice.<b>
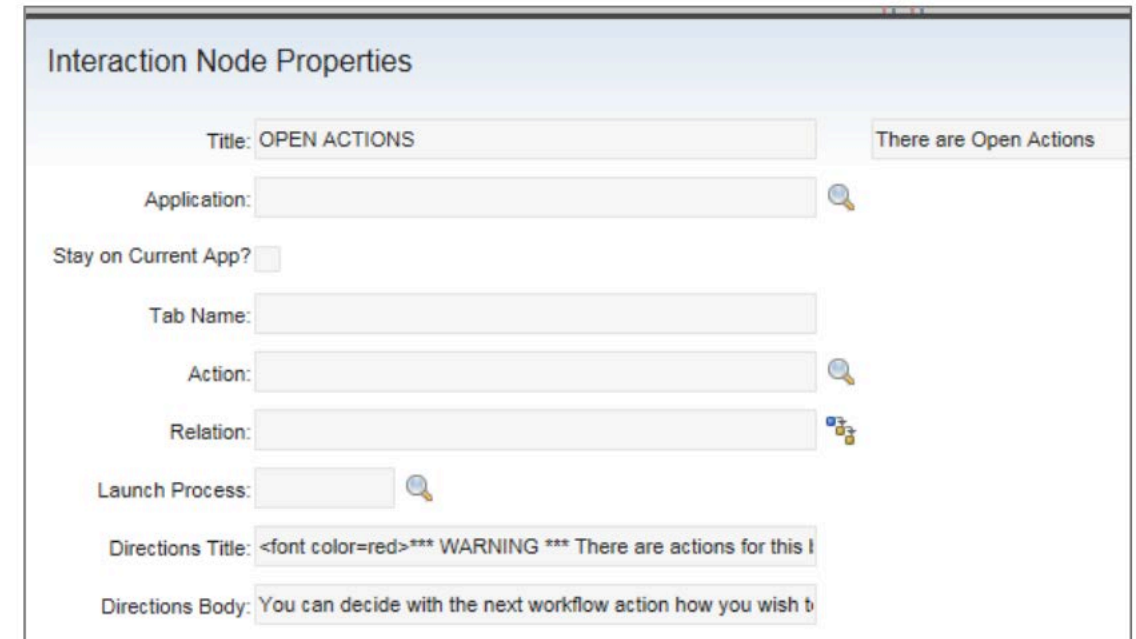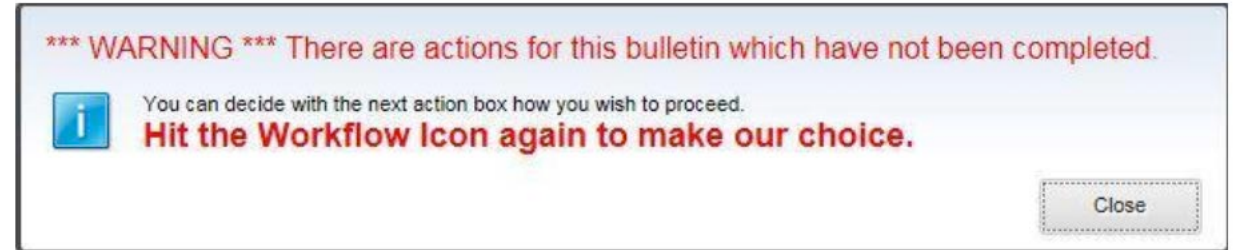
THANK YOU!

Success! You have learned the following skills through this training class:

- How to create a new custom application against an existing Maximo Object
- How to create relationships and use those relationships to display data from related tables
- How to create a table of related data in an application
- How to add new signature options
- How to create an action triggered automation script
- How to add a pushbutton to an application to trigger an action
- How to give access to the pushbutton through security
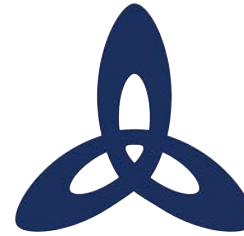
Ask us a technical question:

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MaxTECH is the first ever dedicated Maximo Technical User Group aimed at Maximo Administrators, Developers and Technical Support staff.

It is a great place for users to ask and answer technical questions, learn from each other, collaborate and help improve Maximo in your organization.

MaxTECH was founded in 2017 by BPD Zenith and is chaired by Maximo Consultant Stephen Hume. We host several events every year (Calgary, St. Louis, MaximoWorld, Houston, MUWG, Northern California MUG, Maximo UK & Ireland User Group) including digital events.

MaxTEACH is a free online user group designed to go in depth into a Maximo topic.

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