

2013 WCMUG – Maximo For Mail



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Origins

- Built as a technology preview by IBM Yamato Lab 2010-2011.
- Meant to solve an OLC (Tokyo Disney) use case:
 - Need to get work orders to techs in the park for rapid turnaround of large volumes of short duration work.
- Maximo Architecture became involved in 2010 to help find betas (Sandia).
- Maximo Architecture placed package on ISM Library March 2011, taking responsibility for source, and support of early adopters. “Maximo for E-mail”
- Added to core product base in 7.5 fixpack 3 (7.5.0.3). “Email Interaction Setup”

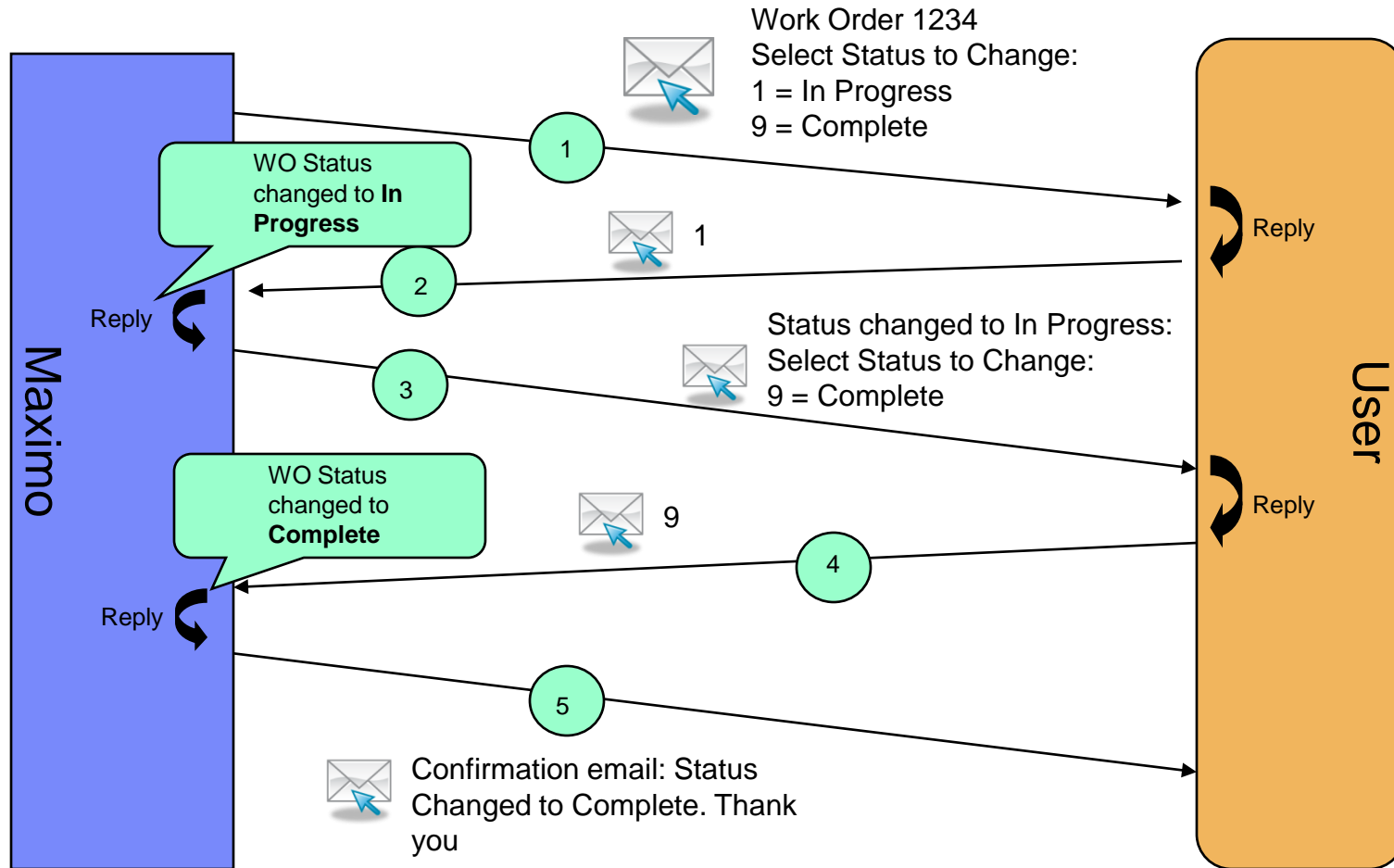
Email Interaction: The Basics

- New configuration application, defining how users can interact with Maximo records by email
 - Leverages the email listener, escalations, comm templates, roles
- Generates an initial outbound email based on any data condition, using escalations
 - User sends an email reply that can:
 - Change status
 - Accept/reject workflow assignment
 - Update Maximo record attributes
- Uses Maximo security and business objects
- Device independent

Use case example – WO Status Change

- Mobile worker receives notification of an approved job he is the owner of, based on escalation and comm. template
- Mobile worker replies to email, setting work order in progress, and making other edits e.g. new target dates
- E-mail listener processes the update, replies to user with a prompt for the next step in the defined chain of events
- Mobile worker replies to the email, choosing to set the work order to complete with a memo
- Maximo sends confirmation email that the email cycle is complete on that record

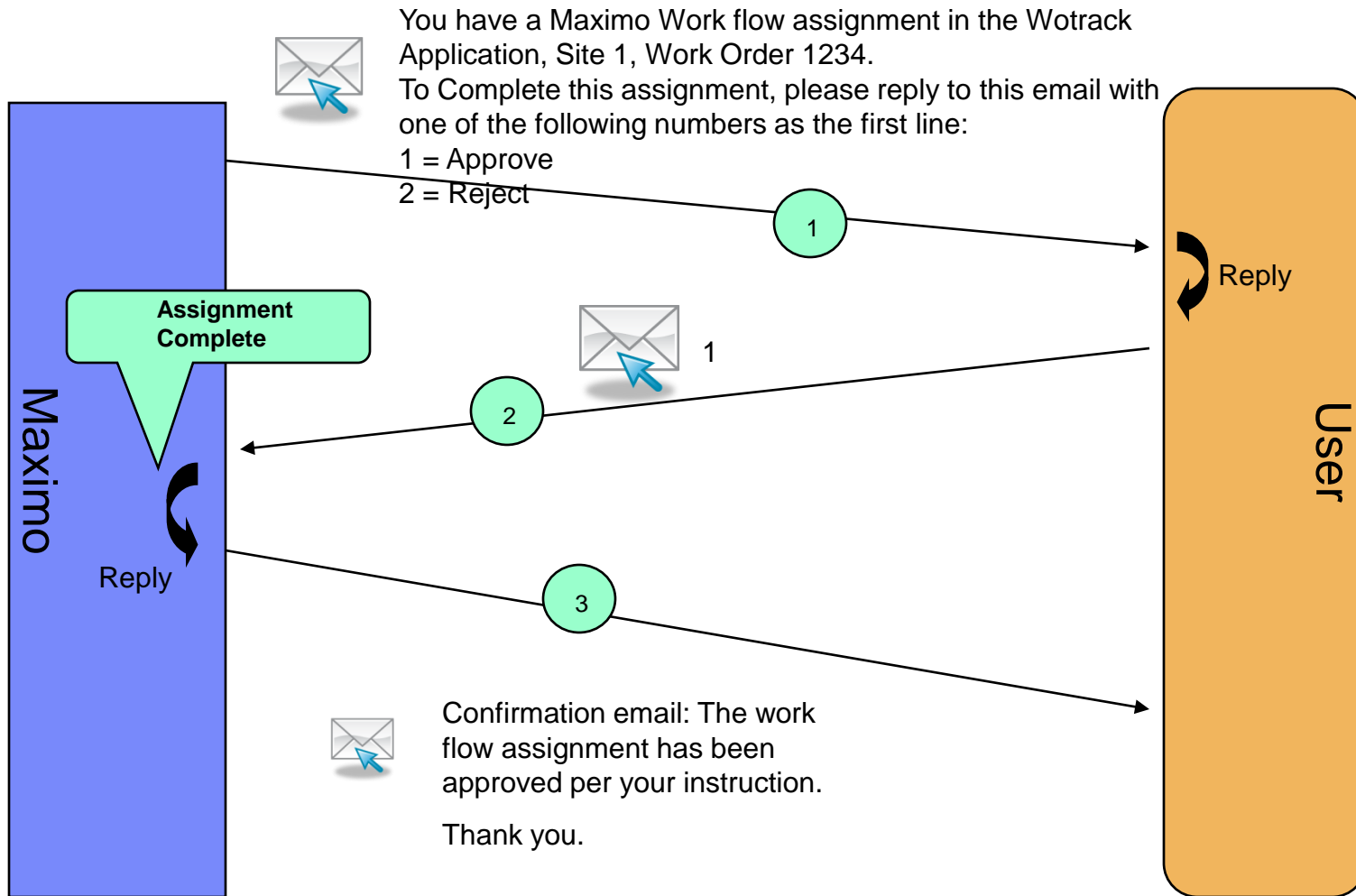
Work Order Status change - In this example, the expected email exchange between server and user consists of five emails:



Use case example 2 – Workflow assignment

- A new Service Request enters Workflow
- The ‘approval’ task is assigned to a supervisor role
- The person acting in that role receives email with information about the SR, and accept/reject actions
- The supervisor accepts the SR for approval
- The E-mail listener processes the update, routing the workflow on its accept action to the next downstream task
- Maximo sends confirmation email to the user that the accept action was processed

Workflow - In this example, the expected email exchange between Maximo for E-mail and user consists of three emails as shown below.



New App sets up messaging rules

The screenshot displays the 'E-mail Operation Configuration' web application. The browser window title is 'E-mail Operation Configuration - Windows Internet Explorer'. The address bar shows the URL: `http://localhost:9080/maximo/ui/?event=loadapp&value=mfmailcfg&uisessionid=1`. The application interface includes a search bar, a 'Select Action' dropdown, and a 'Configuration' tab. The configuration fields are:

- Configuration: MFVO
- Maximo for E-mail WorkOrder Status: Maximo for E-mail WorkOrder Status
- Workflow Process: [empty]
- Object: WORKORDER
- The WORKORDER Table
- Active?

Below the configuration fields are two tables:

Object Status Change Configurations

Status	Description	Attributes
APPR	Approved	STATUS,SITEID,WONUM,SCHEDSTART,SCHEDFINISH
INPRG	In Progress	STATUS,SITEID,WONUM,SCHEDSTART,SCHEDFINISH

Selection Values for APPR

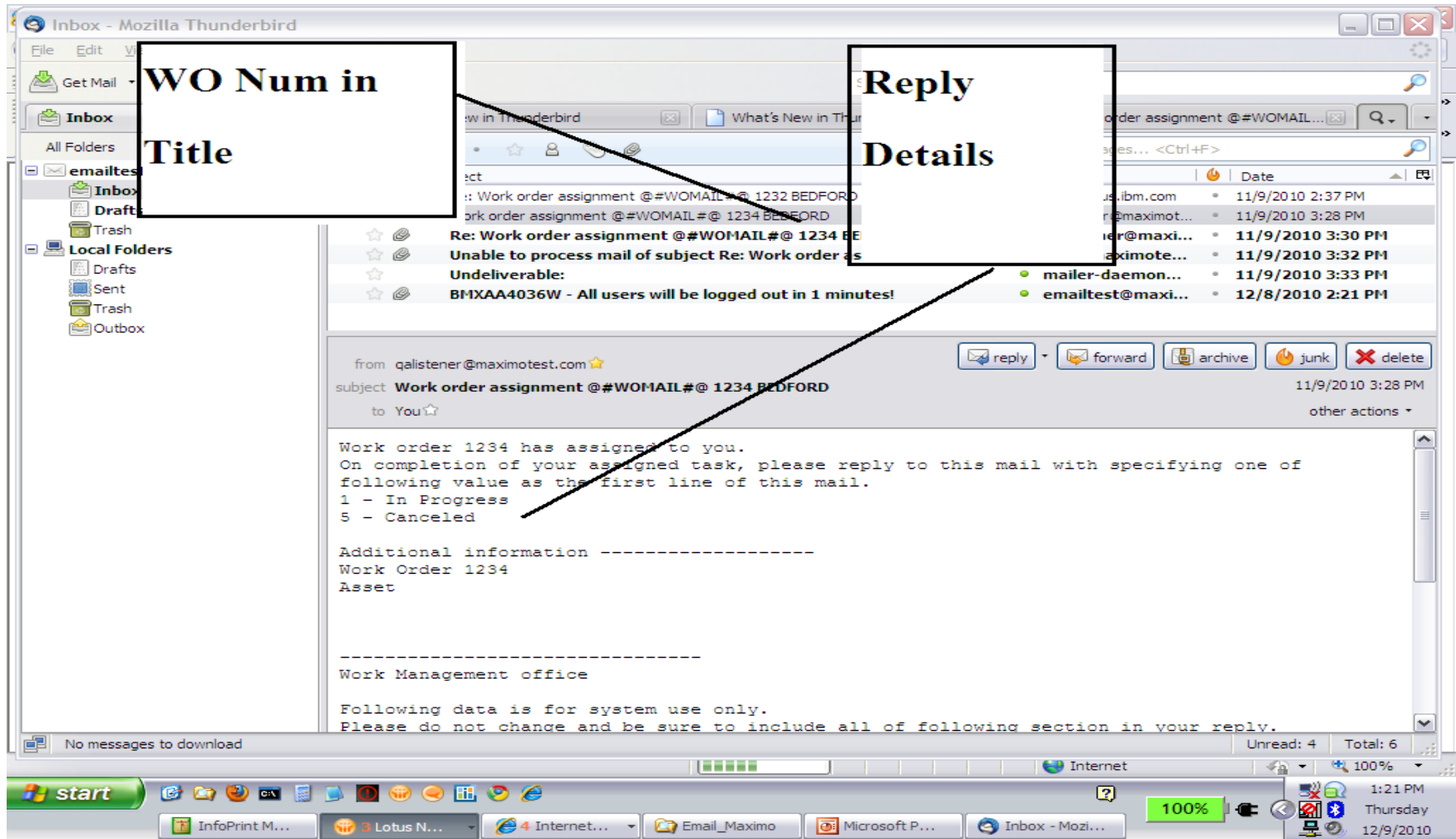
Selection Value	Target Status	Description
1	INPRG	In Progress
2	COMP	Completed

The bottom of the screenshot shows the Windows taskbar with the Start button, several application icons, and the system tray displaying the time as 6:49 PM.

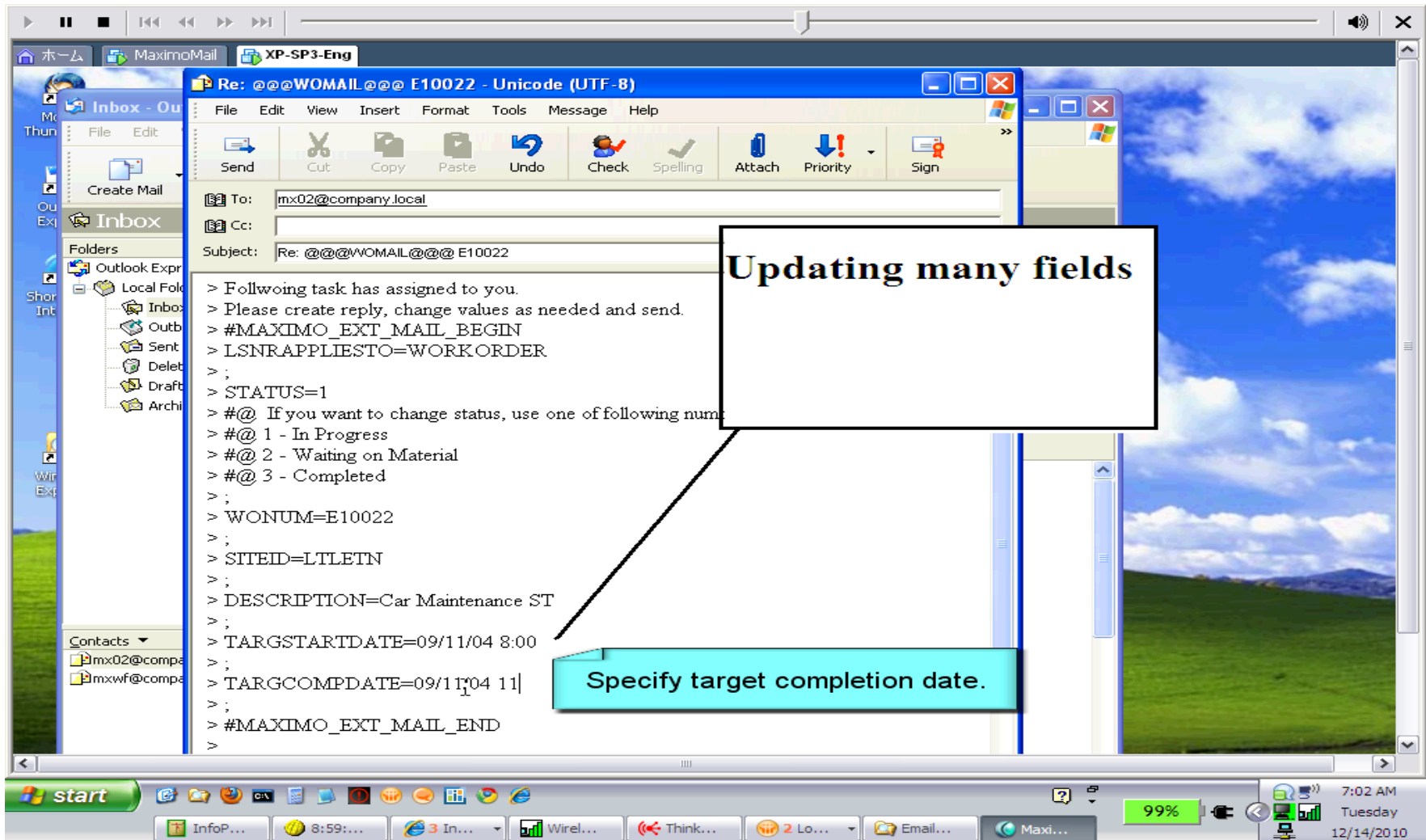
Leverages existing apps, user privileges

- Initial outbound email is kicked off by escalation
- Messages are constructed as communication templates
- E-mail listener processes the update, replies to user with a prompt for the next step in the defined chain of events
- Updates are processed as if by logged-in user

Email received by mobile worker



Mobile worker replies with updates



Re: @@@WOMAIL@@@ E10022 - Unicode (UTF-8)

To: mx02@company.local

Cc:

Subject: Re: @@@WOMAIL@@@ E10022

> Following task has assigned to you.
> Please create reply, change values as needed and send.
> #MAXIMO_EXT_MAIL_BEGIN
> LSNRAPPLIESTO=WORKORDER
> ;
> STATUS=1
> #@ If you want to change status, use one of following number
> #@ 1 - In Progress
> #@ 2 - Waiting on Material
> #@ 3 - Completed
> ;
> WONUM=E10022
> ;
> SITEID=LTTLETN
> ;
> DESCRIPTION=Car Maintenance ST
> ;
> TARGSTARTDATE=09/11/04 8:00
> ;
> TARGCOMPDATE=09/11/04 11|
> ;
> #MAXIMO_EXT_MAIL_END
>

Updating many fields

Specify target completion date.

start

InfoP... 8:59:... 3 In... Wirel... Think... 2 Lo... Email... Maxi...

99%

7:02 AM
Tuesday
12/14/2010

Integration with Workflow

- In the E-mail Operation Configuration, select an active workflow process for the object. Then the appropriate nodes may be chosen for notification in the email cycles.

The screenshot displays the 'E-mail Operation Configuration' web application. The configuration fields are as follows:

- Configuration: WFWO (Work order multi-level approval in email)
- Workflow Process: MFWO (Work order approval process - for email)
- Object: WORKORDER (The WORKORDER Table)
- Active?

The 'Workflow Assignment Configurations' table shows the following data:

Node	Title	Attribute to store value	Attributes
2	FIN APPR1		
4	FIN APPR2		
8	SAFETY		

The 'Selection Values for 2' table shows the following data:

Selection value	Accept	Store the value to attribute	Description
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2	<input type="checkbox"/>	<input type="checkbox"/>	

Conclusion: configurable email scenarios

- Status changes
 - Simple, using numeric reply on reply line only
 - Advanced, by editing the email reply body
 - allowing attribute updates as well
- Workflow approve or reject
 - Simple, using numeric reply on reply line only
 - Advanced, by editing the email reply body
- Simple vs. advanced is a person id pref

Questions?

