

IBM Sustainability Software

Maximo Mobile Lab Guide

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This guide is intended for an instructor-led classroom setting, where the instructor will guide the candidates through each step and explain every step, in details.

1. Login to MAS Manage

- Use the login credentials to login to Maximo Application Suite, and then launch Manage. Verify that you've got access to all functional modules in Maximo.

2. Create a labor record with your user ID

- Navigate to the Labor application and create a new labor record using your own user ID.
- Add a craft to your labor record. For example – ELEC (Electrician – 1st class)
- Select Calendar as DAY, and shift as DAY -> Save the record.

The screenshot displays the 'Labor' application interface within the IBM Maximo Application Suite. The top navigation bar shows 'IBM Maximo Application Suite' and 'Manage'. The main header is 'Labor'. On the left, there is a sidebar with a search bar and a list of 'Common Actions' and 'More Actions'. The 'Common Actions' include 'New Labor', 'Save Labor', 'Clear Changes', 'Change Status', and 'Create Report'. The 'More Actions' include 'View History', 'View Crew Assignments', 'View Assigned Work', 'Zero Year to Date Hours', 'Create Labor Inventory Location', 'Attachment Library/Folders', 'Duplicate Labor', 'Delete Labor', 'Add to Bookmarks', and 'Run Reports'. The main form area has tabs for 'Labor', 'Crafts', 'Qualifications', 'Work Zones', 'Map', and a dropdown menu. The 'Labor' tab is active, showing fields for '* Labor', '* Person', 'Work Site', 'Work Location', 'Labor Inventory Site', 'Labor Inventory Location', 'Start Location', and 'End Location'. Each field has a search icon or a dropdown arrow. On the right side, there are additional fields: 'Organization' (EAGLENA), 'Status' (ACTIVE), 'Work Type', 'Supervisor', 'Crew Work Group', 'Location Refresh (in seconds)', and 'Save Location with Work Order?' (a toggle switch).

3. Create a Work Order

- Create a workorder from the WO Tracking application.
- Select an asset, Work type and Failure Class for the WO.

The screenshot displays the IBM Maximo Application Suite interface for the 'Work Order Tracking' application. The left sidebar contains a 'List View' button and a search bar. Below the search bar is a 'Common Actions' section with buttons for 'New Work Order', 'Save Work Order', 'Clear Changes', 'Change Status', 'Select Owner', 'Take Ownership', 'Approve Work Order', 'Initiate Work Order', 'Complete Work Order', and 'Close Work Order'. The main area shows the 'Work Order' form with the following fields:

- Work Order:** 1201
- Location:** PUMPHOUSE5
- Asset:** AH005
- Configuration Item:** (empty)
- Parent WO:** (empty)
- Classification:** (empty)
- Site:** BEDFORD
- Class:** WORKORDER
- Work Type:** CM
- GL Account:** (empty)
- Failure Class:** PUMPS
- Problem Code:** (empty)

- Use a job plan to create tasks inside the WO and set the WO Priority.
- Associate an Inspection Form to the WO.









The screenshot displays the IBM Maximo Application Suite interface for the 'Work Order Tracking' application, showing the 'Work Order' form with the 'Job Details' and 'Asset Details' sections. The left sidebar contains a 'List View' button and a search bar. Below the search bar is an 'Available Queries' dropdown and a 'Common Actions' section with buttons for 'New Work Order', 'Save Work Order', 'Clear Changes', 'Change Status', 'Select Owner', 'Take Ownership', 'Approve Work Order', 'Initiate Work Order', 'Complete Work Order', 'Close Work Order', and 'Create Report'. The main area shows the 'Work Order' form with the following fields:

- Job Details:**
 - Job Plan:** JP11430
 - Job Plan Revision #:** 0
 - PM:** (empty)
 - Safety Plan:** (empty)
 - Contract:** (empty)
 - Inspection Form:** 1006
 - Inspection Result:** (empty)
- Asset Details:**
 - Asset Up?:** ☒
 - Warranties Exist?:** ☐
 - SLA Applied?:** ☐
 - Charge to Store?:** ☐
 - Current Value:** (empty)
 - Health:** 33

- Add planned labor of the same craft selected for your labor record.

Tasks for Work Order 1201 (1 - 6 of 8)



Sequence		Task	Summary	Estimated
▼	10		Check pump operation.	 0:2
▼	20		Check pump float switch.	 0:3
▼	30		Check housing for leaks.	 0:1
▼	40		Replace mechanical seal.	 1:0
▼	50		Replace contactor & clean contactor cor	 1:0
▼	60		Inspect impeller for wear	 0:1
1 - 6 of 8				 

1 - 6 of 8

Labor

Materials

Services

Tools



Labor (1 - 2 of 2)



Actions

Task		Crew Type	Craft	Skill Level	Vendor
▼	🔍	>	ELECT	>	FIRSTCLASS 🔍
▼	🔍	>	MECH	>	FIRSTCLASS 🔍
1 - 2 of 2					◀ ▶

1 - 2 of 2

- Add planned materials.

Labor

Materials

Services

Tools



Materials (1 - 5 of 5)



Actions

Task		Item	Description				Quantity	
▼		🔍	XMP-3000	ⓘ	➤	Gasket- B330	📄	1.00
▼		🔍	LF777	ⓘ	➤	Filter, Oil	📄	1.00
▼	40	🔍	11453	ⓘ	➤	Seal, Mechanical, Self Aligning- 1 In ID	📄	1.00
▼	50	🔍	11241	ⓘ	➤	Contactor, Renewal Kit	📄	1.00
▼	60	🔍	XMP-9500	ⓘ	➤	Gasket- AR46	📄	1.00
1 - 5 of 5								

1 - 5 of 5

- Approve the WO.

4. Create an assignment for your user ID

- Assign the WO to yourself.
- Additionally, also assign one of the tasks from the same WO to yourself.

The screenshot displays the IBM Maximo Assignment Manager interface. The top navigation bar includes the IBM Maximo Application Suite logo and a 'Manage' tab. The left sidebar contains a search bar and a list of navigation items. The main content area is titled 'Assignment Manager' and features a 'Work List' section with a table of work orders. Below this, there is a 'Labor' section with a table of labor assignments. The interface includes various action buttons and filters to manage the assignment process.

Work List (1 - 8 of 10)

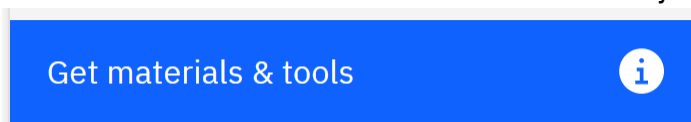
Work Order	Task	Description	Labor	Craft
1201				
1201	10	Check pump operation.		
1201	20	Check pump float switch.		
1201	30	Check housing for leaks.		
1201	40	Replace mechanical seal.		
1201	50	Replace contactor & clean contactor compartment.		
1201	60	Inspect impeller for wear		
1201	70	Record amperage and voltage with motor operating.		
1201	90	Inspect main disconnect and all electrical.		

Labor List (1 - 1 of 1)

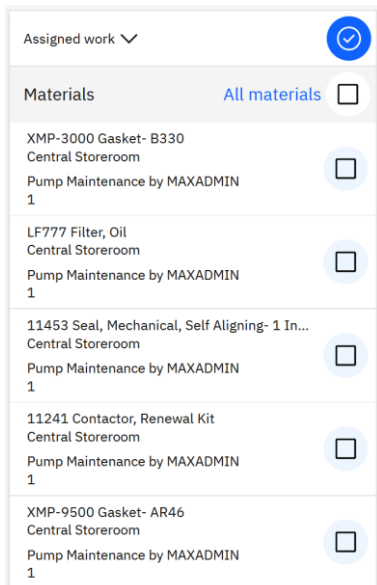
Labor	Name	Craft	Skill Level	Vendor
maxadmin				
MAXADMIN	MAXADMIN	ELECT	FIRSTCLASS	EMI

5. Open the Technician role-based application

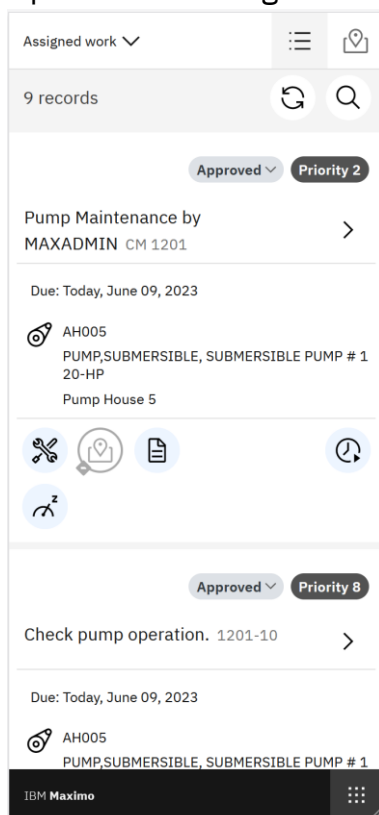
- Click on “Get materials & Tools”. Note this only shows up the first time you login.



Depending on what materials are required for your assigned work, the materials will show up on the screen. Check the corresponding boxes to indicate that the technician has collected these items from the warehouse before proceeding to the work order location.



- Open the WO assigned to your ID. Notice the task also shows up as an Assignment.



- Click on “Start Work”



On clicking on the button, the timer will get started.

Work order

Pump Maintenance by MAXADMIN CM 1201

Approved ▼ **Priority 2**

Details

June 09, 2023 at 5:11 am
June 09, 2023 at 7:11 am
3 hours
Scheduled dates and duration

Asset and location

Up ↑

AH005
PUMP,SUBMERSIBLE, SUBMERSIBLE PUMP # 1 20-HP
Pump House 5

IBM Maximo

- Change the status to IN PROGRESS.

Change status

Select a status

Completed COMP	<input type="radio"/>
Waiting on approval WAPPR	<input type="radio"/>
Canceled CAN	<input type="radio"/>
In progress INPRG	<input type="radio"/>
Waiting to be scheduled WSCH	<input type="radio"/>
Closed CLOSE	<input type="radio"/>
Waiting on material WMATL	<input type="radio"/>
Waiting on plant cond WPCOND	<input type="radio"/>

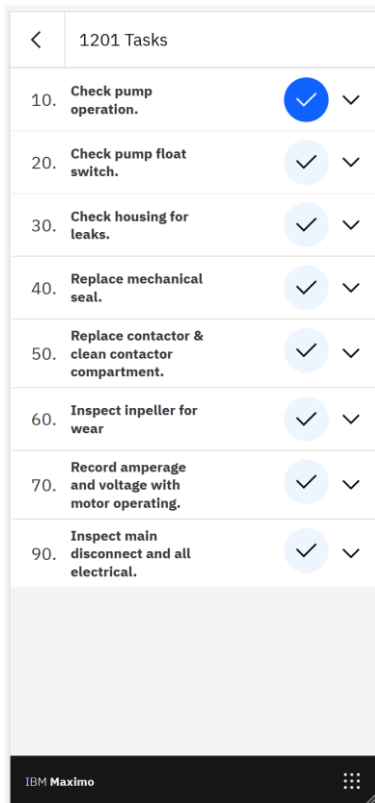
Add a comment (optional) 0/50

Add a comment about the status change

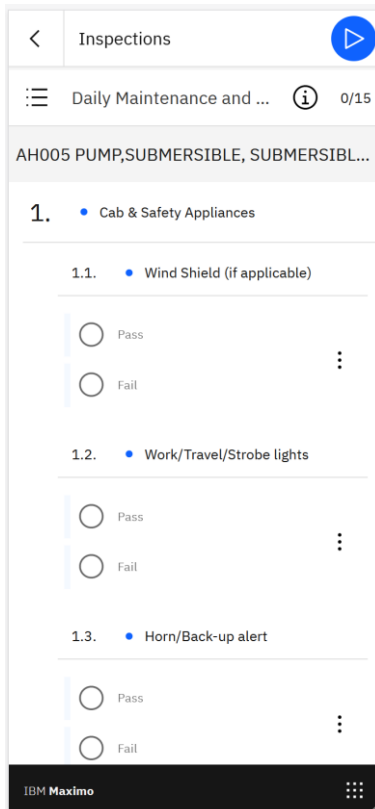
- Click on the TASK icon to open the list of tasks on this WO.



The list of tasks will show up.



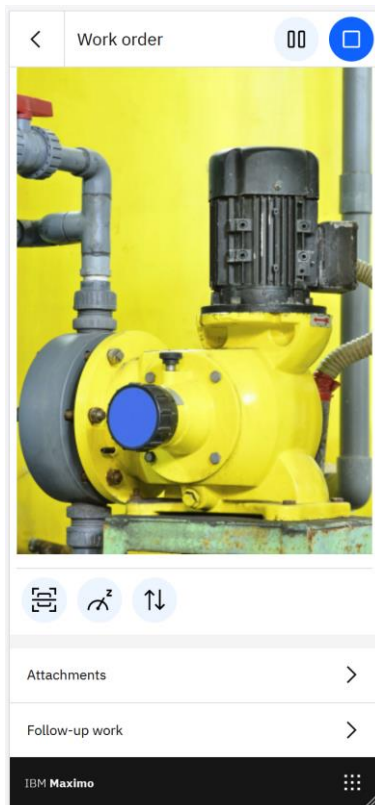
- Click on the INSPECTION icon to launch the inspection created for this WO.



Start the inspection and then complete the inspection questions.

- Mark the asset for downtime.
Scroll down to the Asset Details section and look for this icon





Click on the icon, to log downtime.

- Add a work log for the work order.
Click on the work log icon.



This would open the logging screen. Enter your log and post it.

×

Work log

Today, June 09, 2023

MAXADMIN

This is a sample work log from the mobile device.

Add a note

0/100

↕

➤

- Collect remaining materials or request for additional material.
Click on this icon to open the planned materials screen.



Click on the 3-dots on the top right corner to find the option to request for additional materials.

×

Materials

⋮

Materials

Get reserved items >

XMP-3000 Gasket- B330 Central Storeroom	Request materials	🛒
LF777 Filter, Oil Central Storeroom	1.00	
11453 Seal, Mechanical, Self Aligning- 1 In... Central Storeroom	1.00	
11241 Contactor, Renewal Kit Central Storeroom	1.00	
XMP-9500 Gasket- AR46 Central Storeroom	1.00	

Use this screen to request for additional materials.

<

Material request

✓

Materials list

+

Add materials

Request details

• Required date

M/D/YY

📅

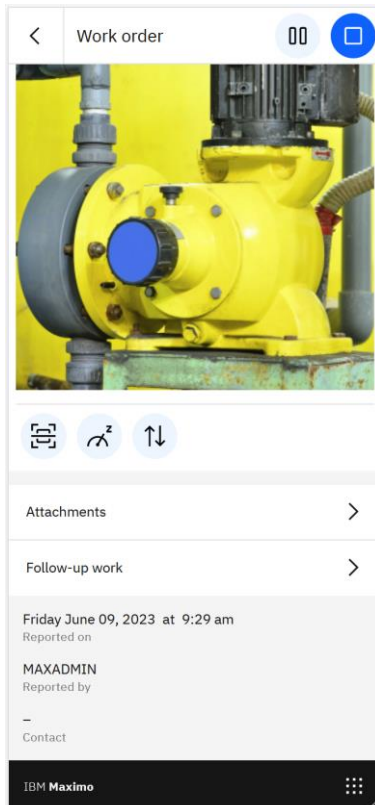
Priority

1

Drop to

- Attach relevant docs/images for the WO.

On the main WO details screen, scroll down to find the attachments option.

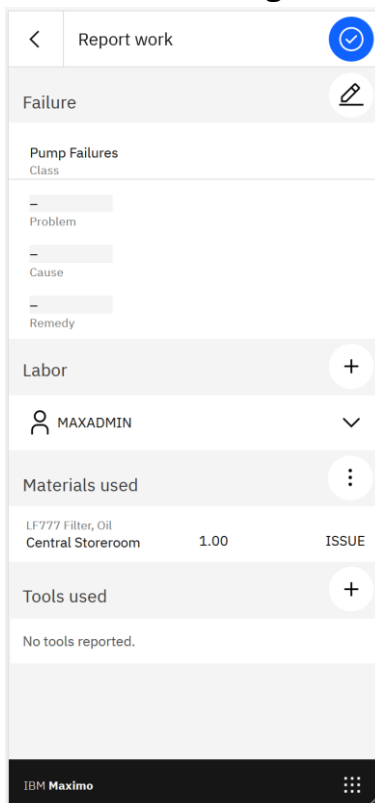


Open the Attachment section and upload any readable file of your choice.

- Click on the REPORT WORK icon.



This screen allows a lot of functionality for the technicians, like failure reporting, logging labor hours, adding actual materials used, actual tools used, and complete the WO.



- Proceed to complete the WO.

Click on the COMPLETE WORK icon and confirm your labour hours to complete the WO.



- Validate all changes made in the WO Tracking application.