Section 4: Workflows & Escalations in Maximo

Q1. What is a Workflow in Maximo?

A workflow in Maximo automates business processes by routing records (like Work Orders, Purchase Requisitions) through different stages based on conditions.

It defines roles, actions, approvals, notifications.

Workflows ensure compliance with business rules.

Example Scenario (Interview Style):

■ *"In my project, I designed a workflow for Work Order approval. When a WO was created, it routed to the Supervisor. If approved, it went to the Manager; otherwise, it returned to the user with comments."*

Q2. What are the main components of a Workflow?

1. Start/Stop Nodes – Entry and exit points.
2. Interaction Nodes – Manual input from users.
• Task → Assigns work to a user/role.
• Wait → Waits until a condition is met.
3. Action Nodes – System performs actions automatically.
• Change Status, Set Value, Automation Script call.
4. Condition Nodes – Branching based on conditions (Yes/No).
5. Subprocess Nodes – Call another workflow from the main workflow.
6. Communication Nodes – Send notifications (email).

Q3. How do you start a Workflow in Maximo?

Workflows can be triggered in two ways:
• Manually – From the application (e.g., Start Workflow button in Work Order app).
• Automatically – Configured using Workflow Administration (e.g., auto-start on record creation).

Q4. How do you handle conditional routing in a Workflow?

Use a Condition Node.

Conditions are defined using Conditional Expressions.

Based on True/False, the record takes different paths.

Example:

If Work Order Priority = 1 → Route to Manager for approval.

Else → Route to Supervisor.

Q5. What is the difference between a Task Node and an Action Node in Workflow?

Task Node → Requires human action (approval, review, input).

Action Node → System performs an automatic action (status change, attribute update, run script).

Q6. How do you integrate Automation Scripts with Workflows?

Create an Action Launch Point script.

Reference the Action inside Workflow.

Example Scenario:
- *I created an Action script to automatically assign Supervisor = User's Manager. This action was called in Workflow before sending for approval.*

Q7. What are Escalations in Maximo?

Escalations are background processes that monitor records based on conditions and perform actions if conditions are met.

They run on a schedule (like cron).

Actions can be → send notifications, change status, invoke scripts.

Example Scenario:
- *In my project, an escalation checked for Work Orders pending approval for more than 48 hours. It sent reminder emails to the approver and escalated to the Manager.*

Q8. What are the components of an Escalation?

1. Condition – Defines which records to monitor.
2. Schedule – Defines how often escalation runs.
3. Escalation Points – Define conditions & actions (status change, notification, script).
4. Actions – The tasks to perform.

Q9. Can Workflow and Escalation work together?

Yes ■.

Workflow automates business processes in real-time.

Escalation monitors conditions in the background.

Example:

Workflow → Route Work Order for approval.

Escalation → Send reminder if WO is not approved in 48 hours.

Q10. How do you test a Workflow in Maximo?

1. Create a test record (e.g., new Work Order).
2. Start the Workflow manually.
3. Check logs (systemout.log) for errors.
4. Use Workflow Designer → Validate the process before activation.
5. Use Workflow Administration → View record's current workflow assignment.

Q11. How do you troubleshoot a Workflow issue?

Check if Workflow is Active.

Verify if the user has the required role assignment.

Use Workflow Administration to trace the workflow path.

Check Conditional Expressions.

Review systemout.log for script or action errors.

Q12. Real-Time Example: Workflow & Escalation

■ *"In one project, we had a requirement where Purchase Requisitions above $50,000 required CFO approval. I designed a Workflow with conditional routing:*

If amount ≤ 50,000 → Route to Manager.

If amount > 50,000 → Route to CFO.

Additionally, I created an Escalation that checked every 24 hours if the PR was still pending approval. If yes, it sent a reminder email to the approver. This ensured no critical requisition was delayed."