Presentation topics and outline

• What is Workflow and what are its benefits?
• Best practices and common pitfalls
• The components of Maximo Workflow
• Live Demonstration
• Q & A
What is Maximo Workflow?

• Workflow automates the routing of Maximo records
• Assigns records (e.g. a PO) as tasks to users
• Modifies records based on conditions
• Implementation-specific data checking and enforcement
What is Maximo Workflow? - continued

- Virtually any record in Maximo can be handled through Workflow
- Workflow is a standard component in v6 and v7 of Maximo
Common uses of Workflow

- Purchase Order approval assignments
- Service Request handling, assignments and Work Order creation
- Management of Change in Petrochemical and Oil & Gas industries*
- Email notification at specific Status changes on PRs, POs, SRs, etc.
The Benefits of Maximo Workflow

• Apply and enforce your *specific* business rules to the handling of records
• Automatically assigns records to specific individual(s) based on which stage of the process the record is
• Escalates records based on conditions, such as time elapsed to respond
• Assignment notifications can be performed by email (particularly useful for people who do not log into Maximo on a regular basis)

Workflow enables and enforces records to flow according to your specific business processes
DO

- Get sufficient training
- Get help from experts for your first implementation – however small
- First, formally design, map and agree on the business process to be automated
- Use Workflow to automate repetitive steps or data entry
Best Practices and Common Pitfalls

DON’T

• Overcomplicate – don’t build in any more complexity than **absolutely** required
• Annoy the users – don’t create assignments on records people already work with on a daily basis (e.g. caution against using Workflow for Work Orders)
• Reinvent the wheel – don’t use Workflow where existing Maximo tools, a Result Set, Saved Query or other, simpler solutions suffice
Components of Maximo Workflow

**Maximo Applications used:**

- The people involved: Roles, Person, Person Groups
- Email notifications: Communication Templates
- Manipulating records: Actions
- Workflow configuration and administration: Workflow Designer, Workflow Administration
Components of Maximo Workflow -

*Workflow Designer*

Task node: Inbox assignment with Positive or Negative Result

Condition node: System evaluates a condition with a binary True or False result and then routes the record accordingly

Manual Input node: Prompts the user with multiple options and then routes the record accordingly
Components of Maximo Workflow - continued

**Workflow Designer**

- **Interaction** node: Launch a Maximo application to guide the user through structured interaction with the record
- **Wait** node: Pause until a value on the record changes to a specific value
- **Subprocess** node: Launch another workflow process within this process
- **Stop** node: Stops the process
Live Demo...
Thank you for your attendance.
Are you looking for information or assistance on Maximo Workflow?

Contact us at
info@ontracksconsulting.com or Frank directly at (780) 916-3639

Any Questions?