Maximo Priorities  
June 27, 2018

Out of the ~42 open Remedy tickets for Maximo enhancements, the 15 items below are projects being actively worked on. Supporting criteria for selecting these were:

- User impact/high customer satisfaction potential
- Maximum use of existing technology
- High potential savings
- High streamlining improvement potential
- Minimum impact on other processes
- Existing project support
- Ease of implementation
- High probability of quick results
- Projects that were in progress and then put on hold in late 2017 due to upgrade efforts (and determined there is still a need).

Smaller tasks, such as minor configurations or setting changes will be merged with the larger projects below. As each project nears completion, open tickets will be re-evaluated, and it will be determined what to work on based on the supporting criteria and timelines of active projects, with agreement from the requestor(s), stakeholders and the Core User Group.

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1) Bugs/issues since the upgrade: Fix performance issues when performing certain actions and with interfaces from other systems. Fix issues where Maximo email communications are randomly not being sent out. Ticket INC000002238323.
   
   **Supporting criteria:**
   - User impact/high customer satisfaction potential
   
   **Estimated Completion:** June 2018

2) Customer support: Edit the wording in the automatic email from Maximo when a SR is cancelled to clarify who cancelled the SR or clarify that the UFR listed is the Primary UFR, not necessarily the UFR who cancelled the SR. Currently, the email only provides the Primary UFR information, but doesn’t indicate it is the primary UFR, which can be confusing to the customer. Ticket INC000002228029.
   
   **Supporting criteria:**
   - User impact/high customer satisfaction potential
   - Ease of implementation
   
   **Estimated Completion:** June 2018 - **Completed**

3) Audit: Create a Job Plan Variance report in Maximo. This report will compare hours on Job Plans to actual hours on Work Orders that reference those Job Plans. Having this information will provide us with the ability to create new job plans and modify existing job plans to reflect more accurate hours needed to perform the work. This will benefit FM's Planning and Scheduling initiative as it will allow more accurate scheduling to take place. Ticket INC000002065675.
   
   **Supporting criteria:**
   - Existing project support
   - Maximum use of existing technology
   
   **Estimated Completion:** June 2018 - **Completed**
4) **Streamlining/Data Clean-up:** Create a new site in Maximo Test, document procedures. Determine what is shared with the CORNELL site, and what isn't. Review all queries, CU reports, automation scripts, cron tasks & workflows to see what is site specific. Determine if and where it is hard coded, create a parameter for site. Review where Site ID exists in the database and make sure it is populated where it should be. See if a default site has been set in the database. This will facilitate implementations of Maximo for Cornell organizations outside of FCS. Ticket INC000001819593.

   **Supporting criteria:**
   - User impact/high customer satisfaction potential
   - Maximum use of existing technology
   - High streamlining improvement potential
   **Estimated Completion:** July 2018

5) **Enhancement/Streamlining:** EZMaxMobile: When tapping on the "Divided Route" button, show all stops on one page instead of having multiple pages. This will eliminate the need to scroll to the bottom of the page in order to click the "next page" button to select more route stops. Streamlining this process makes sense as the number of divided routes is increasing for like-work (exhaust fans, fan coils). Ticket INC000001917209

   **Supporting criteria:**
   - User impact/high customer satisfaction potential
   - Maximum use of existing technology
   - Ease of implementation
   **Estimated Completion:** July 2018

6) **Reporting:** EZMaxMobile: Update EZMaxMobile functionality so that when a work log is made against a task (either in Enter Task Readings or on the Step itself), along with creating the work log on the main work order with the prefix of the task number, it simultaneously creates a log in the task work order without the prefix. This will allow for reporting to show comments made to a task and be bound to a specific reading on that task. The Condition Monitoring OBIEE model allows for reporting on observations made against the task WOs, but the logs are now only showing on the parent WO in Maximo. This change will allow accurate Condition Monitoring reporting as it would display data at the relevant level. Ticket INC000001307808

   **Supporting criteria:**
   - Ease of implementation
   - Maximum use of existing technology
   - High probability of quick results
   **Estimated Completion:** July 2018

7) **Billing support:** Turn billing back on for trades labor against CM/PM account (reversing changes made with Project Monarch). This will save approximately 4 hours a week and reduce the risk of errors. When Project Monarch was implemented for FY17 (which was to turn off the billing for EN & SCL labor transactions against the CM/PM account, in an effort to reduce internal billings), many of the accounts were also modified. This time, accounts will not need to change. At that time, mark-up was changed from 17% to 0%. This time, mark-up will remain at 0%. The proposal is to turn this billing back on to begin billing the first month of FY19 (July 2018). Current state: On WOs where the GL Account is the CM/PM maintenance account, EN & SCL labor do not bill, but CC labor bills, and all materials bill. The problem we are trying to solve: There is not an easy way to get P/L reports, now that some CM/PM labor transactions are billed, and others aren't. In KFS, Finance can't run one P/L report for FM, they have to get the data from various sources and consolidate it. Hours are tracked against the CM/PM account and can be reported on through Maximo reporting, but you have to make sure you are looking at the right data (billed = departmental, unbilled = CM/PM, do not include CC labor). This increases risks of errors since people need to be very careful about queries they are running in order to not duplicate any
transactions, while making sure everything that should be included is included, in order to create a combined report with KFS data. Ticket INC000002256445.

**Supporting criteria:**
- High potential savings
- High streamlining improvement potential
- Ease of implementation
- Minimum impact on other processes

**Estimated Completion:** July 2018

8) **Billing support:** Determine a way to prevent any type of charge (labor, material, service, tool) to be saved on a Parent WO in Maximo. GL Accounts are typically not on parent WOs, so if there are charges entered and saved on Parent WOs, errors occur with the billing system, preventing billing to run until it is fixed. There is currently a rule in EZMaxMobile that prevents transactions to be saved on Parent WOs. The proposal is to create a rule in Maximo that prevents charges from being saved on Parent WOs when the Parent WO was created from a Route on a PM. A rule should also be created to not allow MRs, PRs, POs to be created on a Parent WO that was created from a Route on PM. In either case, if a user tries to do what is prevented, an error message will also be displayed. Problem Statement: The problem of charges being entered on Parent WOs affects finance and facility stakeholders. When finance runs billing, and charges are on a Parent WO and a GL account is missing on the Parent WO, it prevents billing from running, and time must be spent researching where the costs must be allocated. This problem also affects facility stakeholders in that they aren’t seeing correct costs on assets and locations in their facility(s) when the charges are billed on the Parent WO. The impact is costs are not being tracked against the appropriate asset or location. A successful solution would allow a more efficient way to enter costs against the appropriate asset or location. Ticket INC000002223194.

**Supporting criteria:**
- High potential savings
- High probability of quick results

**Estimated Completion:** July 2018

9) **Planning & Scheduling Project Support:** Provide the ability for tradespeople to view work in the order of their schedule in EZMaxMobile. This includes making the Scheduled Start Date sortable in the EZMaxMobile Work Order list screen. This would allow the tradespeople to sort by scheduled start date of their labor assignment so they could view their schedule in date/time order in EZMaxMobile in lieu of using a printed copy of their schedule. Ticket INC000002149833.

**Supporting criteria:**
- Existing project support
- High streamlining improvement potential
- Minimum impact on other processes

**Estimated Completion:** July 2018 – On Hold due to the complexity of programming vs. benefit received, because the calendar view (Item 10) should provide the same benefit this would provide.

10) **Planning & Scheduling Project Support:** Test a calendar view that InterPro has available for EZMaxMobile. The user who is signed in should be able to tap on a particular day, and a list of WOs would be displayed where the Scheduled Start Date for their Labor Assignment is for that day. Then, the user could tap on a particular WO and it would open the WO. This would allow the tradespeople to sort by scheduled start date of their labor assignment so they could view their schedule in date/time order in EZMaxMobile in lieu of using a printed copy of their schedule. Ticket INC000002255545.

**Supporting criteria:**
- Existing project support
- High streamlining improvement potential
Maximo Priorities
June 27, 2018

- Maximum use of existing technology
- Minimum impact on other processes
  
  **Estimated Completion:** July 2018

11) **Streamlining/Data Clean-up:** Make aesthetic and field changes to the Facility Coordinator Database in the Maximo Locations application. These changes involve narrowing column widths to reduce scrolling needed to see all of the data, eliminating the need to type free-form text, and providing clean, searchable data. Summary of changes 1) The “Role” column was made narrower. 2) When a “Resp. Level” is chosen, the Resp. Level Description will automatically populate in the adjacent column. 3) The Responsibility Description field was changed from free form text field to have Drop Down choices for selecting. Ticket INC000002030128

  **Supporting criteria:**
  - User impact/high customer satisfaction potential
  - Project was 75% complete prior to working on the upgrade and then put on hold until after the upgrade
  - Ease of implementation
  
  **Estimated Completion:** July 2018

12) **Streamlining:** Add GL Accounts to CC Asset Locations in Maximo. This is the final stage of a project to add GL Accounts to all Maximo Asset Locations. Endowed and SCL Asset Locations were completed in 2017. Currently, when SRs are created for CC Locations in Maximo, the Maintenance GL Account does not automatically populate, since most CC Asset Locations do not have a GL Account populated. This impacts UFRs in that they will need to manually enter the Maintenance GL account for all SRs requiring the Maintenance GL account before workflowing a SR to FCS. A successful solution will allow the auto-population of the Maintenance GL Account on SRs when the CC Location is entered. **Selection criteria:** Existing project support, High streamlining improvement potential, maximum use of existing technology, minimum impact on other processes. Ticket INC000002257135.

  **Supporting criteria:**
  - Existing project support
  - Maximum use of existing technology
  - User impact/high customer satisfaction potential
  - Ease of implementation
  - Minimum impact on other processes
  
  **Estimated Completion:** July 2018

13) **Finance support:** Create rules in Maximo and EZMaxMobile that would prevent certain types of labor transactions to be saved. Rules are needed to prevent transactions with a Start Date far in the future or far in the past. Having these rules in Maximo will prevent transactions from being entered in financial periods far outside of the current financial period, because when hours are entered far outside the current financial period, it misrepresents the labor hours in the current financial period, which affects financial budgeting reporting. Another rule that is needed is to prevent saving labor transactions greater than 12 regular or 12 OT hours in one transaction. This is to prevent incorrect hours from being saved on WOs, thus decreasing the need for correcting entries or transfers. Ticket INC000002012491

  **Supporting criteria:**
  - High potential savings
  - User impact/high customer satisfaction potential
  - Project was 30% complete prior to working on the upgrade and then put on hold until after the upgrade.

  **Estimated Completion:** August 2018

14) **Streamlining Project:** Setup and load Grainger Vending Feed into Maximo via provided Excel file. Now, trades wants something out of vending machine. Type in WO #, and other info, take stuff needed. Middle of the month, Grainger sends spreadsheet with data person, WO, unit information. Procurement representatives
currently reviews all of the transactions, manually creates the material charges on billable WOs into Maximo, and charges the Maintenance Account for consumable orders. This process takes approximately 8 hours per month. A task will be created to pull in the information automatically into Maximo. Ticket INC000001673050.

Supporting criteria:
- High potential savings
- High streamlining improvement potential
- Project was 50% complete prior to working on the upgrade and then put on hold until after the upgrade.

Estimated Completion: August 2018

15) Streamlining Project: Create a way for Procurement to manage consumables lists. Currently, any changes to the trade-specific consumables lists are made by CIT. This is not a good use of CIT’s time as it is not programming support is it modifying lists of items. There is also a wait time for the change to be made depending on other IT priorities. An interface is being designed so FM Procurement can manage the lists of items as needed. Ticket INC000001916088.

Supporting criteria:
- High potential savings
- High streamlining improvement potential
- Project was 40% compete prior to working on the upgrade and then put on hold until after the upgrade.

Estimated Completion: October 2018