

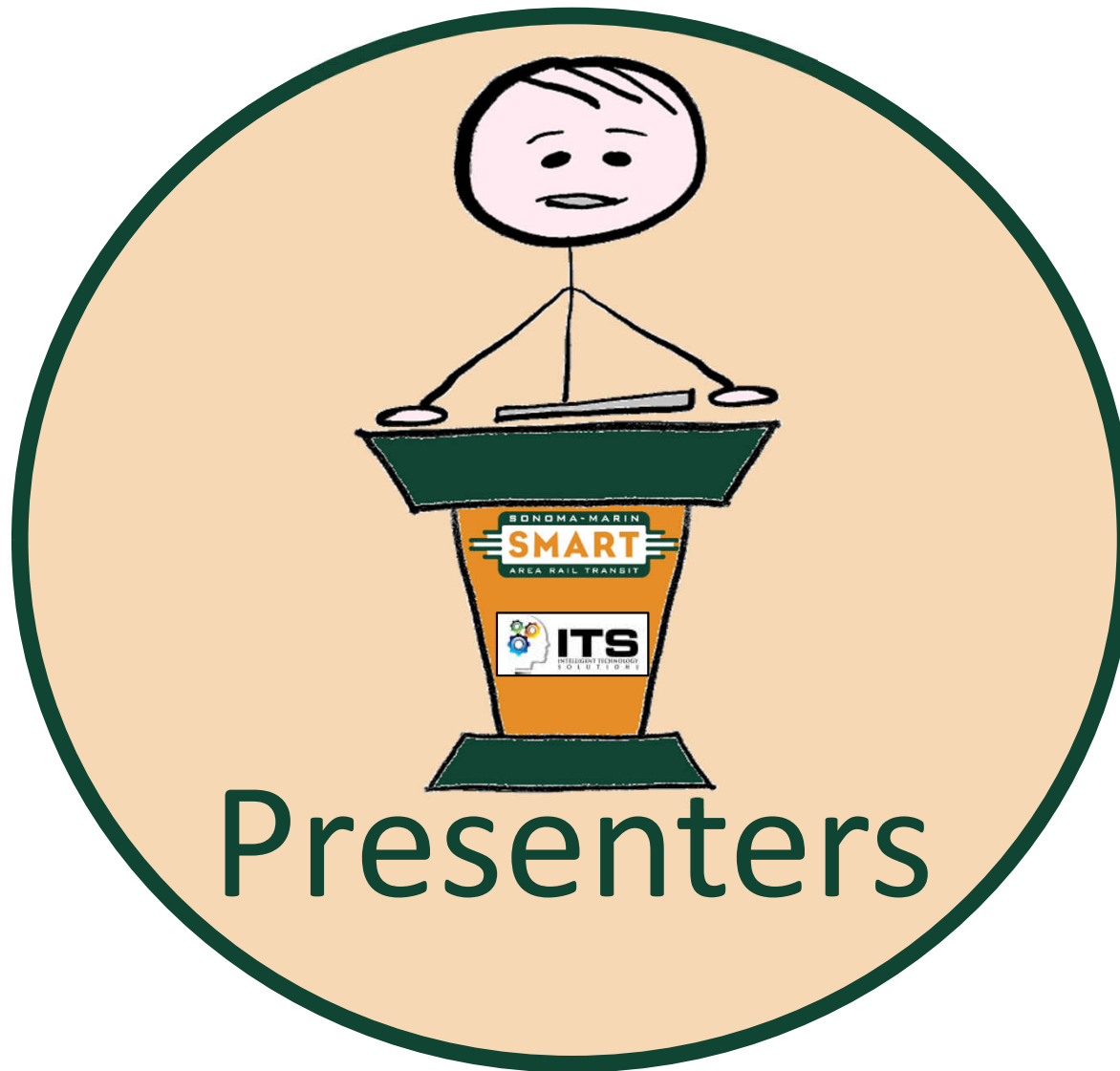
Pacific Maximo User Group Meeting

IMPROVING CUSTOMER SERVICE USING MAXIMO EMAIL LISTENER



Accepting customer requests via email simplified. Flexibility, and tailored capabilities. Joining with Escalations and Communication can be a powerful process enhancer!

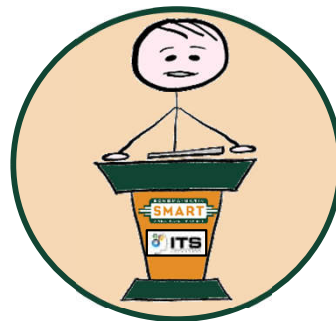




Presenters



TILIANNE TANNER



TIM FERRILL



PRESENTER – TILIANNE TANNER



- Railroad Information Systems Specialist with Sonoma-Marín Area Rail Transit (SMART).
 - » 2 years as SMART's Maximo system administrator
 - on 7.6
 - » 21 years as SCWA Maximo system administrator
 - Maximo v3 through the v4s and jumped to v7s
 - » NorCal Maximo User Group member since first meeting in 2007
 - » Maximo User Group presenter multiple times
 - » MaximoWorld 2019 Presenter
 - » Bachelors in Public Administration
 - University of San Francisco
 - » Toastmasters CC, ALB



PRESENTER – TIM FERRILL

- Solutions Consultant with ITS (Intelligent Technology Solutions)
 - » 18 years of Maximo experience as a Maximo Administrator and Consultant
 - » IBM Certified Maximo Asset Management v7.6 Functional Analyst
 - » Focus on Business Analysis and Process Improvement, Data Analysis and Reporting, and System Customization
 - » Experience with a variety of industries (Government, Utilities, Transportation, etc.) and disciplines (HVAC, Plumbing, Electrical, Fire Suppression, IT)
 - » Published Author with Microsoft Press, and contributing writer with several publications (PC Magazine, CSO Online, Network World)





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About



and



ITS
INTELLIGENT TECHNOLOGY
SOLUTIONS



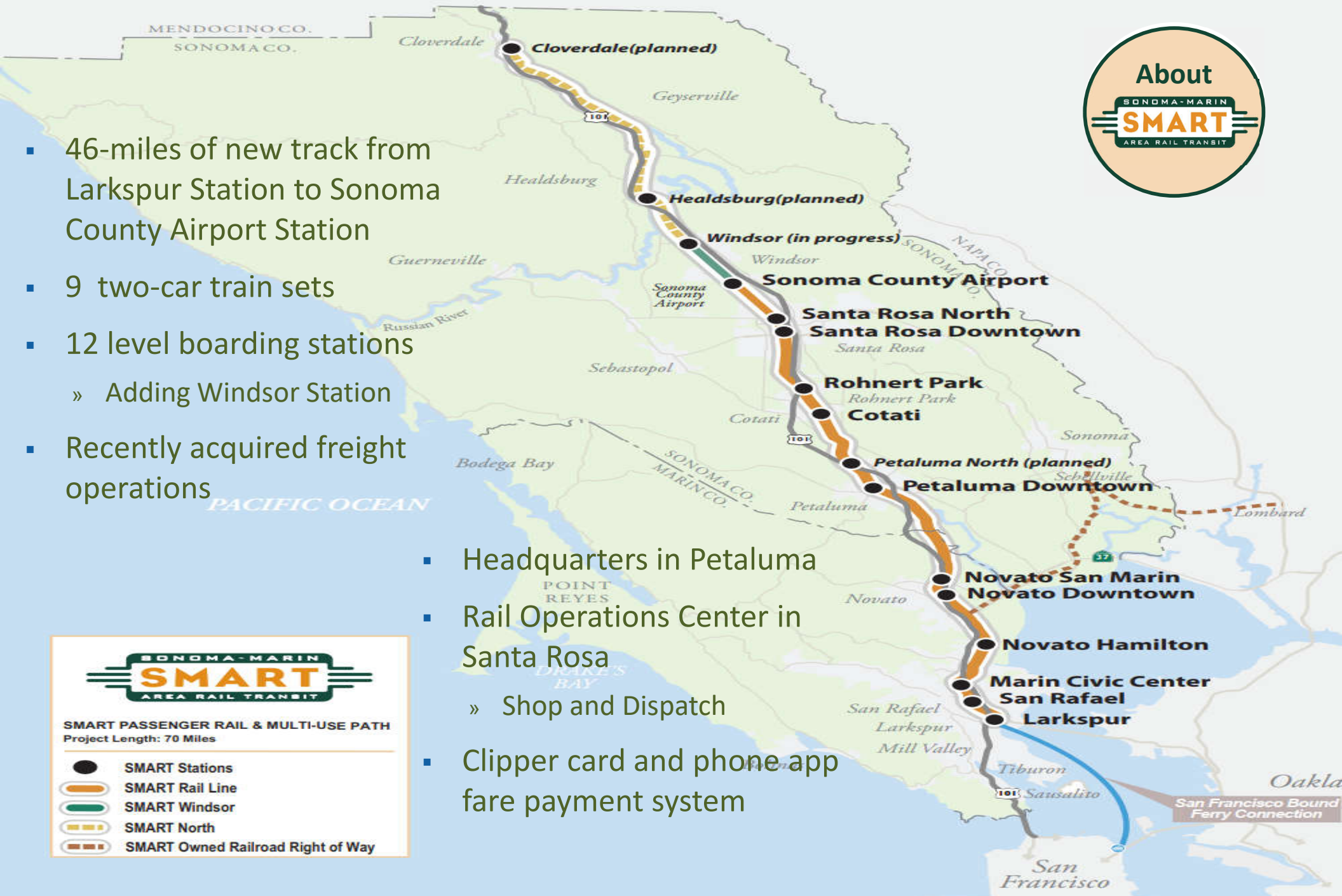
SMART || SONOMA-MARIN AREA RAIL TRANSIT

SONOMA-MARIN AREA RAIL TRANSIT (SMART)

- 46-miles of new track from Larkspur Station to Sonoma County Airport Station
- 9 two-car train sets
- 12 level boarding stations
 - » Adding Windsor Station
- Recently acquired freight operations



- Headquarters in Petaluma
- Rail Operations Center in Santa Rosa
 - » Shop and Dispatch
- Clipper card and phone app fare payment system



SMART'S MAXIMO TRANSPORTATION

Work Orders

- Preventative Maintenance (scheduled)
- Corrective Maintenance (unscheduled)

Email Listener

- I.T. Service Requests
- Setting up for Facilities, Signals, and Track Departments.

Assets and Locations

- Meters
- Specification Templates
- Tools

Operator Log (from HSE)

Purchasing

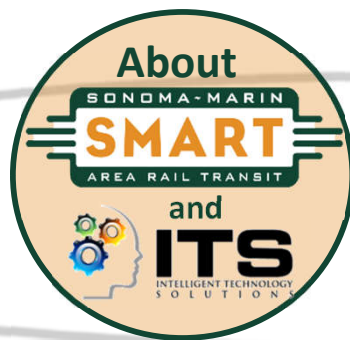
Inventory

Invoicing

Future Additions

- Condition Monitoring
- Maximo Mobile





AGREEMENT



- Liaison

- Projetechno MAAS Cloud Service
- IBM Software Licensing



- Software Support
 - Consultations
 - Reports
 - Configuration changes
 - Workflow



INTELLIGENT TECHNOLOGY SOLUTIONS

- IBM Gold Partner
- Current and Former client list includes multiple Fortune 500 companies, as well as Sonoma County Water Agency and Sonoma-Marín Area Rail Transit



Founded in 1999

- Provides a wide range of services including business consulting, on-demand Maximo support and administration, system development, analytics and reporting, and software licensing
- Offers MaxAware – a system monitoring solution built specifically for Maximo





1: Original
SMART I.T.
"Requests"

2: The Best
Solution for
SMART I.T.

3: Email
Listener Setup
Components

4: Initial Setup
Overview
ITS - SMART

5: ITS Considers
Troubleshooting
and Security

6: Listener
Opportunities
and R.O.I.
at SMART



1: Original SMART I.T. “Requests”

ORIGINAL I.T. SERVICE REQUESTS

- Peoples' memories
- Note pads
- 3x5 cards
- Sticky notes
- Texts / Teams
- In meeting mentions
- Excel spread sheets
- Word documents
- Phone Calls
- White boards
- Drive-by requests



MANY SOURCES LED TO LAGS OR LOSS IN SERVICE



ORIGINAL SMART I.T. SERVICE REQUESTS

- Hard to track and follow through with all requested work
- Unable to see the requests for the I.T. team
- Clumsy to divvy out to team
- Created work orders manually when escalating

CAUSE: NO FORMAL PROCESS IN PLACE FOR RECEIVING I.T. TICKETS



DIFFICULTIES IN CAPTURING REQUESTS

- Call centers with staff:
 - » Require trained individuals
 - » Subject to:
 - Data entry errors
 - Requirements lost in translation

- Third party tools:
 - » Expensive
 - » Require integration

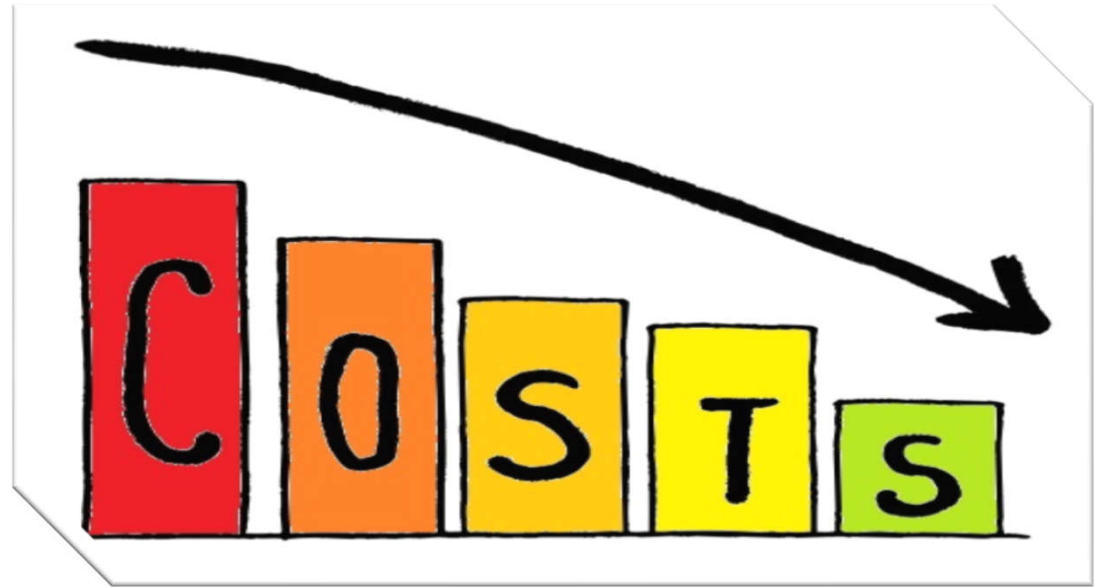


- Customers creating tickets directly in Maximo:
 - » Licensing burdens
 - » User access management ramifications

2: The Best Solution for SMART I.T.

MAXIMO EMAIL LISTENER SOLUTION

- Setup straightforward
- Initial record creation
- Updates to record
- Immediate ROI
 - » Tuning current functions
 - » Introducing more capabilities



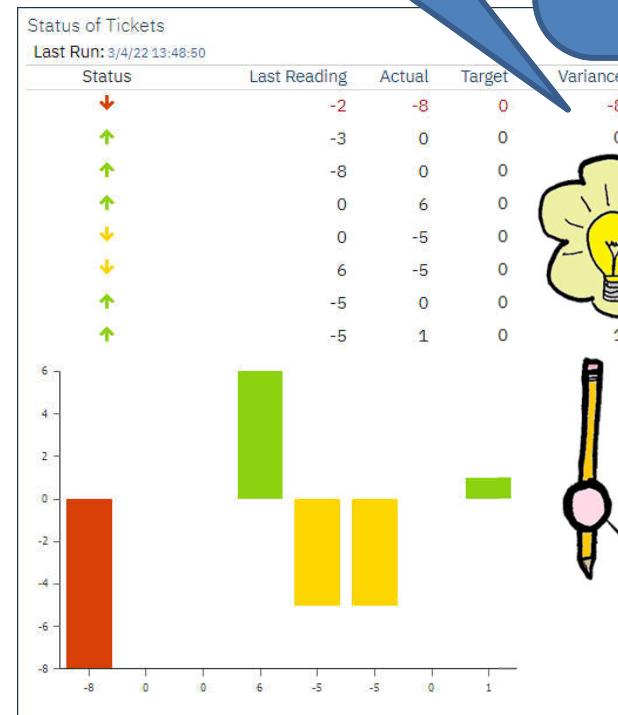
- Saves time and resources:
 - » Fields filled automatically
 - » Templated communications
 - » Search ability in list view
 - » Licensing relief

SMART I.T. EMAIL LISTENER OVERVIEW

- All service requests routed through 'HelpDesk'
- All IT has access to the email.
- All replies are from staff in I.T.
 - » Replies from HelpDesk would create a new ticket.
- I.T. Start Center has graphs:
 - » Current and pending requests
 - » KPIs for ticket status

"Please email HelpDesk."

"If it's not a ticket – it doesn't exist."



3: Email Listener Setup Components

EMAIL LISTENER COMPONENTS

**Organization's
dedicated email**

Person/User Records

Come into play
depending on
your security
settings

Email Listener

Record that defines the email
mailbox to be monitored, and
configures (at a high level)
how messages are handled

Cron Task

Defines the schedule
used to periodically
check the mailbox for
new messages

MAXIMO

Workflow

Default workflow
(LSNRBP) included to
handle basic email
processing, can be
extended to customize
record creation as needed

Communication Templates

Default templates included for various
notifications and inbound email
processing, can be customized and
extended for branding purposes or to
include additional information

4: Initial Setup Overview ITS - SMART

INITIAL SETUP BY USERS

- Decide:
 - » service request auto fill fields
 - » work process
 - who gets
 - what notifications
 - when
- Create department email address:
 - » HelpDesk@Agency.Org
 - » Add who has access

Email = Service Request

Title = Summary

Body = Details

HelpDesk@ = WorkGroup: HelpDesk

From = Reported By: Person

Pictures = Attachments

Notify Help Desk Dept

INITIAL SETUP BY SERVICE PROVIDER

← List View Listener E-mail Processing

E-mail Address: HelpDesk@Agency.org Help Desk Active? ☐

• E-mail Password: ***** • Protocol: imaps Port: 993

Mail Server: _____

• E-mail Folder: INBOX STARTTLS? ☐

Administrator E-mail: HelpDesk@Agency.org

E-mail Processing

• Preprocessor: psdi.common.emailstner.Preprocessor E-mail Deleted? ☐

• Object Key Delimiter: ## Age Threshold: _____

• Workflow Process: LSNRBP > Age Unit of Measure: _____

E-mail Processing Frequency Queue-based Processing

• Schedule: 5m,***** Queue-based Processing? ☐

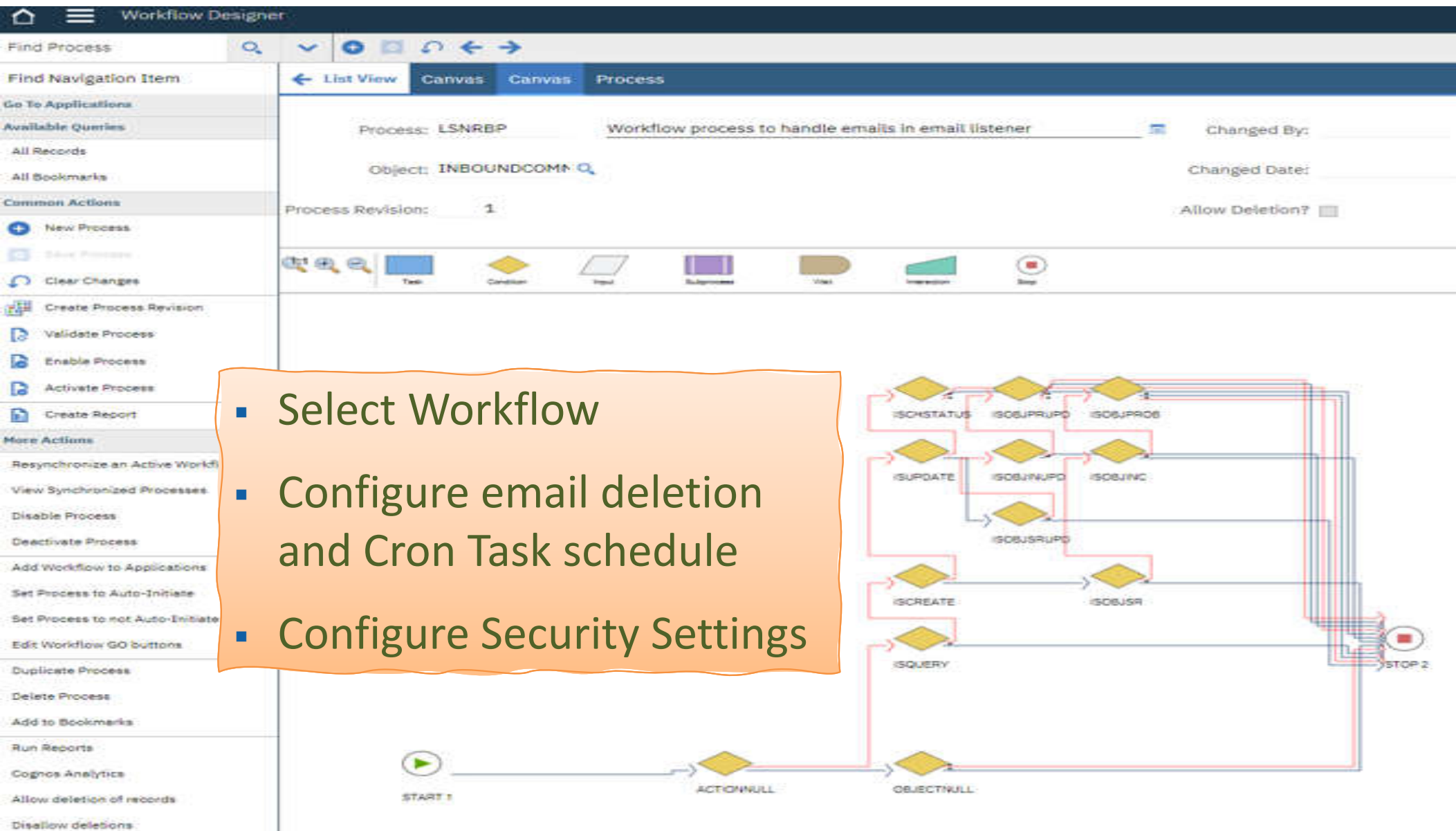
Cron Task Name: LSNRCRON Queue Connection Factory: _____

Cron Task Instance: LSNR3302 Processing Queue: _____

- Create Email Listener
- Configure Mailbox Authentication



INITIAL SETUP BY SERVICE PROVIDER



ENHANCED SETUP FOR MANAGING REQUESTS

- Create saved public queries
- Add Results Sets and KPIs to department Start Centers.



5: ITS Considers Troubleshooting and Security



TROUBLESHOOTING

- Typical Issues:
 - » Connectivity to the mailbox
 - » Problem with processing (reading) the email
- Check E-mail Processing tab of the E-mail Listener
 - » recent messages
 - » processing errors

Home E-mail Listeners

Find Mail Server

Find Navigation Item

Go To Applications

Available Queries

All Records

All Bookmarks

Common Actions

+ New Listener Definition

Save Configuration

Clear Changes

More Actions

Security Settings

Purge Staging Records

Activate/Deactivate Listener

Duplicate Listener

Delete Listener

Add to Bookmarks

List View Listener E-mail Processing

E-mail Address: HelpDesk@Agency.org Help Desk

Mail Server: Outlook.office365.com

E-mails Filter 1 - 3 of 3

Send From	Subject	Created Date	Object Name	Action	Status
=donotreply@emaximo.com					=ERROR,=INVALID
▼ donotreply@emaximo.com	Error creating staging table entry for ad	10/17/19 18:40:51			INVALID
> donotreply@emaximo.com	Error creating staging table entry for ad	3/16/21 07:23:18			INVALID
> donotreply@emaximo.com	Error creating staging table entry for ad	3/22/21 06:03:36			INVALID

E-mail Details

Send To: HelpDesk@Agency.org

CC:

bcc:

Send From: donotreply@emaximo.com

Person Identifier: MAXADMIN

Reply To: donotreply@emaximo.com

Subject: Error creating staging table entry for address HelpDes

Send Date: 10/17/19 18:35:49

Received Date: 10/17/19 18:35:53

Changed Date: 10/17/19 18:40:51

Changed By: MAXADMIN

Status: INVALID

Error: The inbound communication subject line is either blank or too long. Edit the subject line to continue.

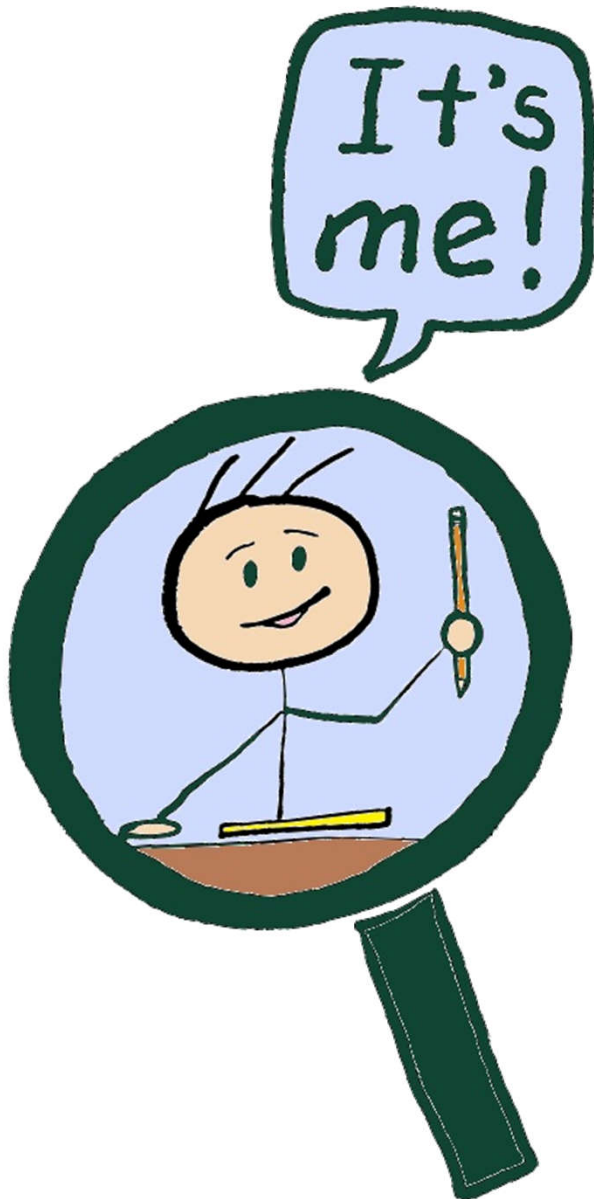
Advanced users:

Diagnose connection issues using
TestEmail.bat file on server

More information available here:
<https://ibm.co/3CnHXvD>



MAXIMO SECURITY CONSIDERATIONS



- Email address used to identify the Person and User
 - » By default a Person record must exist
 - Disabled by using the `mxe.lsnr.validateperson` System Property
 - » If a User is found then permissions are evaluated for that user
 - » If no User is found the Cron Task user is used
- More information available here: <https://ibm.co/3IVKRdo>

6: Listener Opportunities and R.O.I. at SMART

OPPORTUNITIES FOR IMPROVEMENT:



'Reply all' from HelpDesk@agency.org creates a new ticket.

- » Remove HelpDesk email address in the To: field
- » Set up a DoNotReply@Agency.Org for the emails.

Screenshots or pictures become:

- » Blank boxes in the details box
- » Double attachments
- » If email signature has a logo, it becomes an attachment twice also
- » We go to original ITHelp email for screenshots
 - forward from 'me' not helpdesk



To automatically update tickets:

- » It costs a license
- » Requires carefully formatted responses
 - **BETTER TO HAND UPDATE**

SMART'S RETURN ON INVESTMENT

Improved user friendliness

- » Send an email from anywhere

Improved percentage of work logged

Improved transparency

- » tickets visible to organization

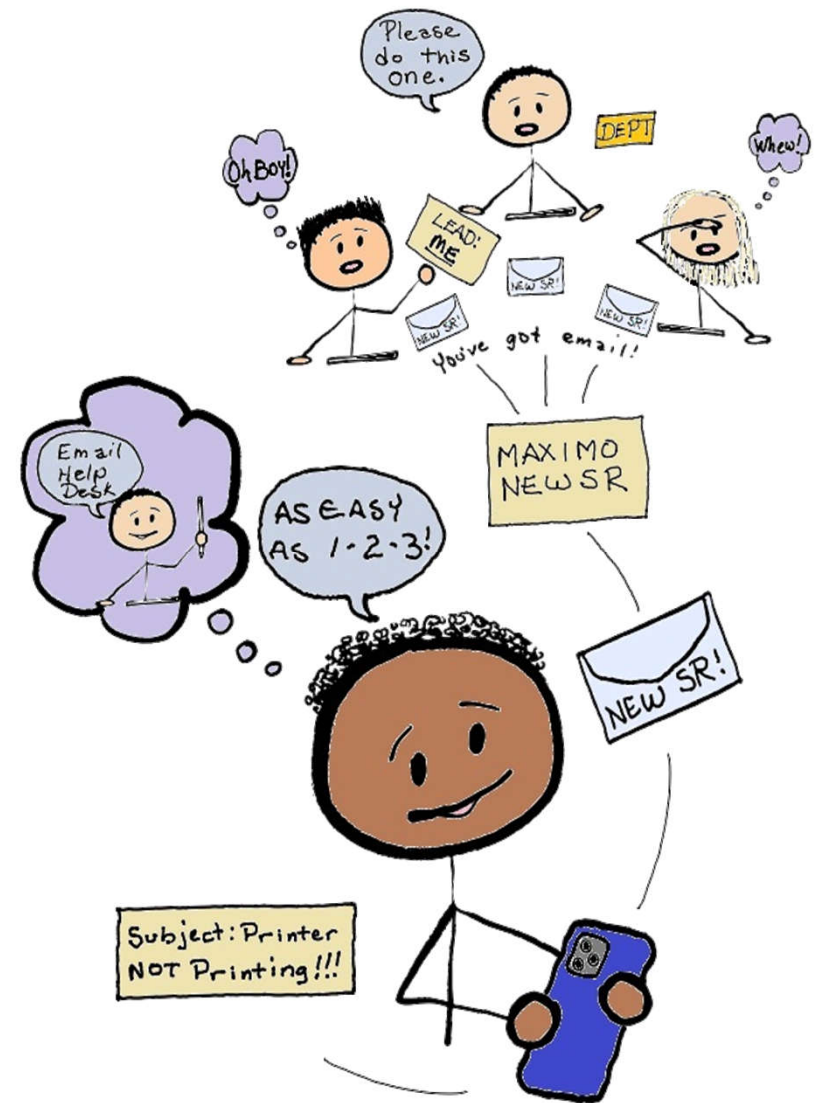
Improved tracking

- » writing updates in tickets

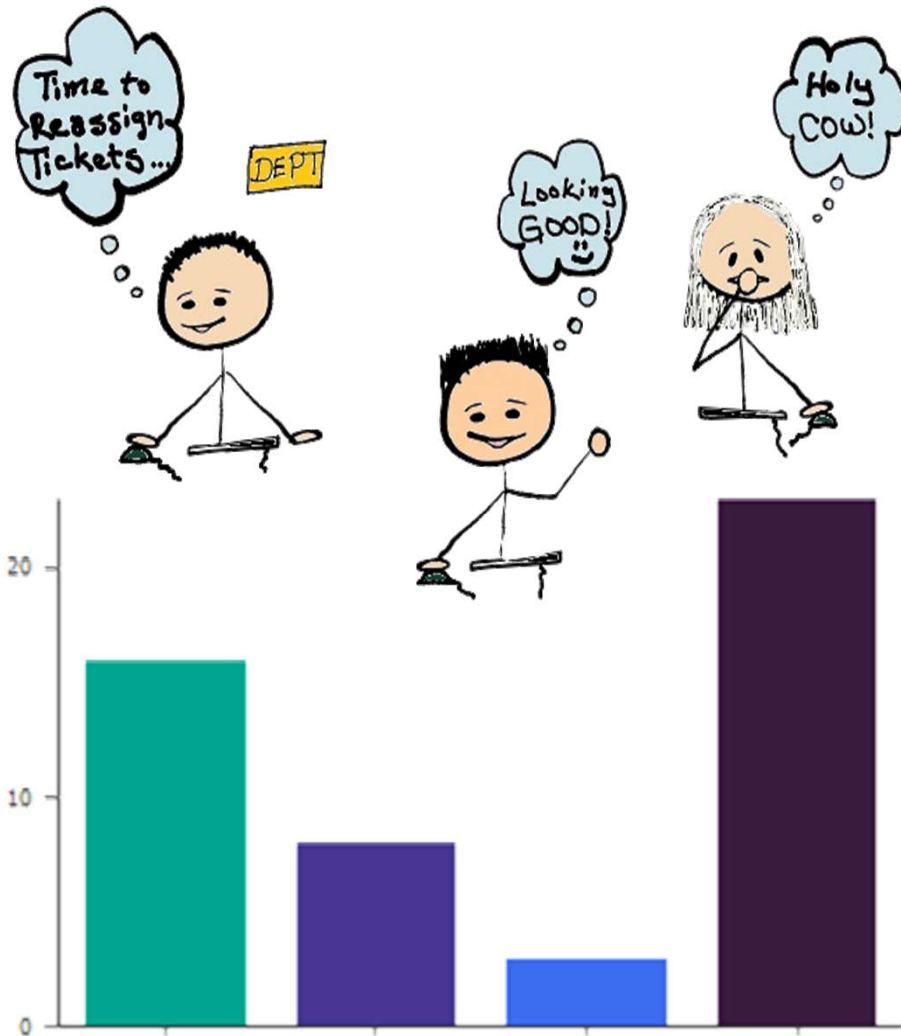
Improved historical information

Improved metrics

- » locations, assets, and resources



SMART'S RETURN ON INVESTMENT



Reduced team managing time

- » Using Start Center
- » Using list view
- » Changing lead field

Reduced correspondence time

- » Automated notifications and replies
 - To department and customers

Reduced escalation time

- » Service request to work order

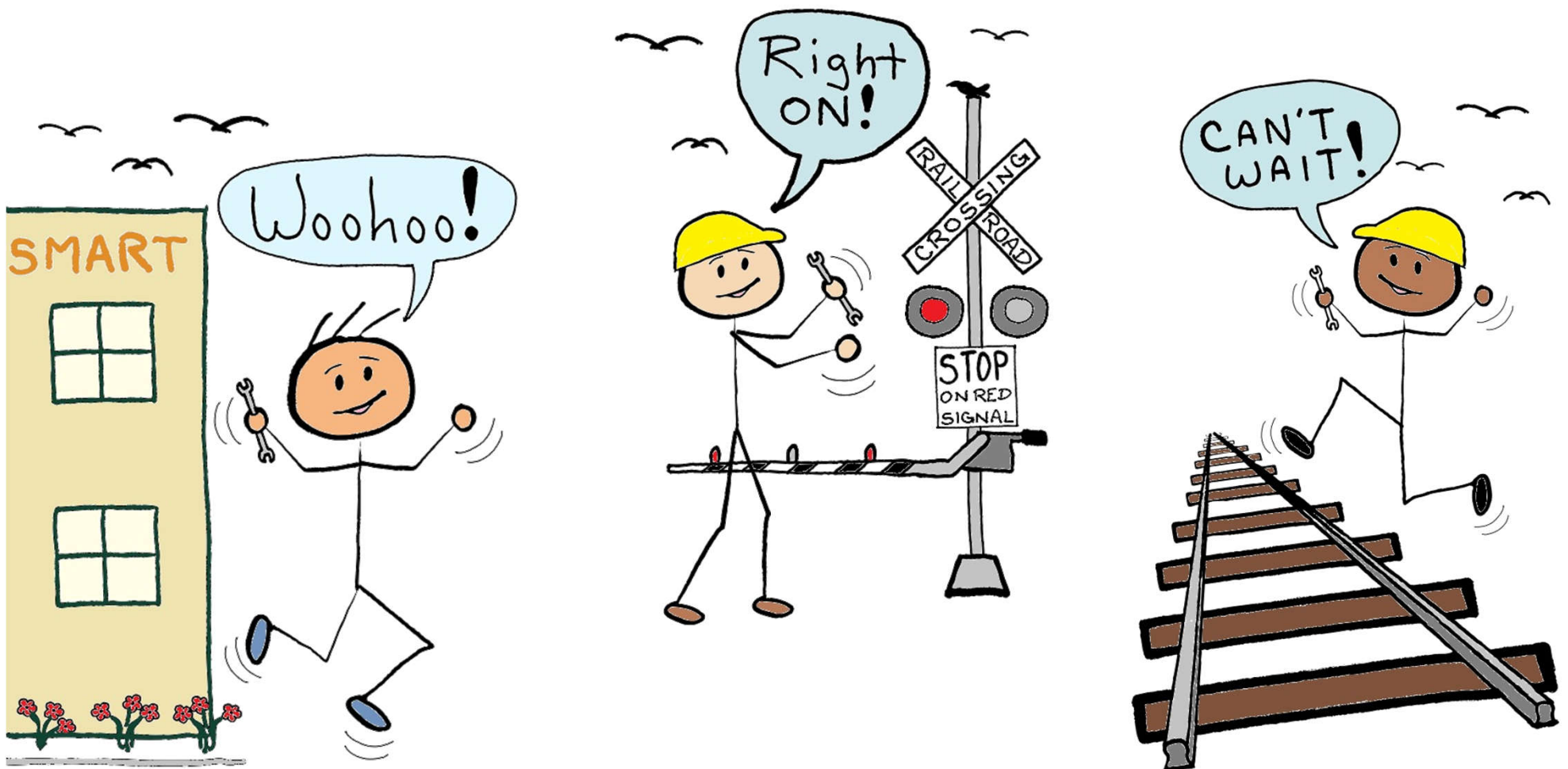
Reduced "drive-by" requests

Reduced logging time

Reduced loss of requests

EVERYONE WANTS WHAT SMART I.T. HAS

Implementing for Facilities, Signals, and Track departments.





Pacific Maximo User Group Meeting

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Accepting customer requests via email simplified, flexibility, and tailored capabilities, joining with Escalations and Communication can be a powerful process enhancer!

March 27, 2022

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DIFFICULTIES IN CAPTURING REQUESTS

- Call centers with staff:
 - Require trained individuals
 - Subject to:
 - Data entry errors
 - Requirements lost in translation
- Third party tools:
 - Expensive
 - Require integration
- Customers creating tickets directly in Maximo:
 - Licensing burdens
 - User access management notifications

Costs

MAXIMO EMAIL LISTENER SOLUTION

- Setup straightforward
- Initial record creation
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 - Tuning current functions
 - Introducing more capabilities

Costs

- Saves time and resources:
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"Please email HelpDesk."

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EMAIL LISTENER COMPONENTS

Organization's dedicated email

Person/User Records

Communication Templates

Workflow

MAXIMO

INITIAL SETUP BY USERS

- Decide:
 - service request auto fill fields
 - work process
 - who gets
 - what notifications
 - when
- Create department email address:
 - HelpDesk@Agency.Org
 - Add who has access

Email = Service Request

Title = Summary
Body = Details
HelpDesk@WorkArea/HelpDesk
From = Reporter/By: Person
Picture=Attachments
Notify Help Desk Dept

INITIAL SETUP BY SERVICE PROVIDER

HelpDesk@Agency.org

Help Desk

Create Email Listener

Configure Mailbox Authentication

INITIAL SETUP BY SERVICE PROVIDER

Select Workflow

Configure email deletion and Cron Task schedule

Configure Security Settings

ENHANCED SETUP FOR MANAGING REQUESTS

- Create saved public queries
- Add Results Sets and KPIs to department Start Centers

MAXIMO SECURITY CONSIDERATIONS

It's me!

- Email address used to identify the Person and User
- By default a Person record must exist
 - Disabled by using the new Invalidated Person System Property
- If a User is found then permissions are evaluated for that user
- If no User is found the Cron Task user is used
- More information available here: <https://ibm.co/3NVRldo>

TROUBLESHOOTING

- Typical Issues:
 - Connectivity to the mailbox
 - Problem with processing (reading) the email
- Check E-mail Processing tab of the E-mail Listener
 - recent messages
 - processing errors

Advanced errors
Diagnose connection issues using mailtool and fix any errors
More information available here: <https://ibm.co/3NVRldo>

SMART'S RETURN ON INVESTMENT

- Improved user friendliness
 - Send an email from anywhere
- Improved percentage of work logged
- Improved transparency
 - tickets visible to organization
- Improved tracking
 - writing updates in tickets
- Improved historical information
- Improved metrics
 - locations, assets, and resources

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EVERYONE WANTS WHAT SMART I.T. HAS

Implementing for Facilities, Signals, and Track departments.

SMART

Woshoo!

Rings on!

Can't wait!