Maximo 7.6.1.x End of Support – 9/30/2025 ;<5 months to go; Are you ready?

Projetech INTERPRO SOLUTIONS BPD ZENITH Peacock engineering EAM Swiss GmbH LeXco activeG

chris.winston@naviam.io https://www.linkedin.com/in/chriswinston IBM Champion 2024/2025

Agenda – MAS Navigation for the Maximo 7.6.x user

- Background
- Summary
- Basic Nav Differences
- New features
  - Operational Dashboard
  - Role based apps
  - Work Order Intelligence

Summary

- User Interface Changes
  - Old skins are no longer available – tivoli09, tivoli13, iot18
  - New skin is for MAS – only 1 available
  - Some system properties for UI are available; several UI related are gone
- Functionality differences?
  - Key items have moved
  - A minimal number of items are gone
- Perceived differences?
  - Look and feel
    - Location of fields and actions
    - Navigation

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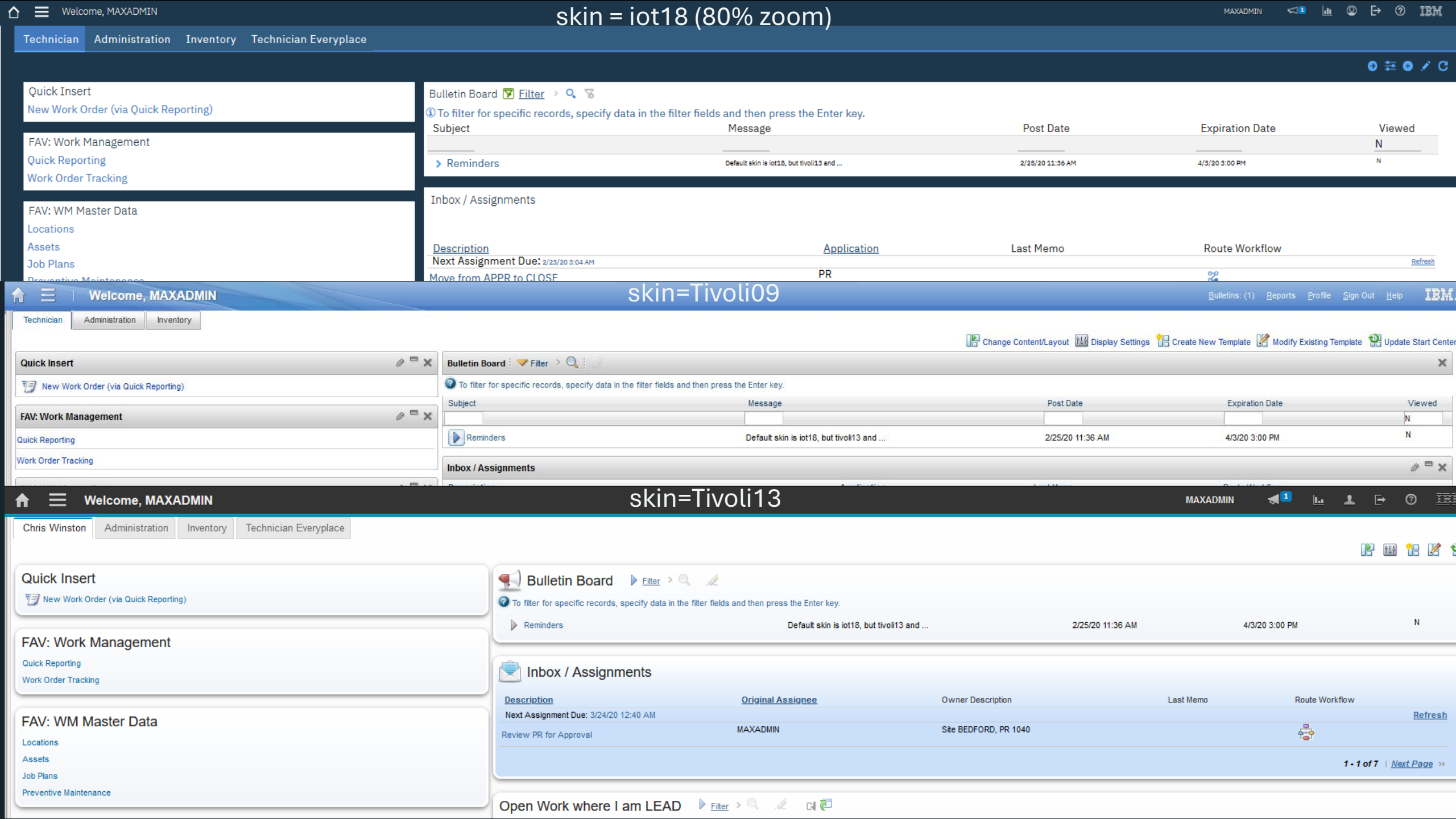
skin = iot18 (80% zoom)
Welcome, MAXADMIN
MAXADMIN
Technician
Administration
Inventory
Technician Everyplace
Quick Insert
New Work Order (via Quick Reporting)
FAV: Work Management
Quick Reporting
Work Order Tracking
FAV: WM Master Data
Locations
Assets
Job Plans
Bulletin Board
Filter
To filter for specific records, specify data in the filter fields and then press the Enter key.
Subject
Message
Post Date
Expiration Date
Viewed
Reminders
Default skin is iot18, but tivoli13 and ...
2/25/20 11:36 AM
4/3/20 3:00 PM
Inbox / Assignments
Description
Application
Last Memo
Route Workflow
Next Assignment Due: 2/23/20 3:04 AM
Refresh
Move from APPR to CLOSE
PR
skin=Tivoli09
Welcome, MAXADMIN
Bulletins: (1)
Reports
Profile
Sign Out
Help
Technician
Administration
Inventory
Change Content/Layout
Display Settings
Create New Template
Modify Existing Template
Update Start Center
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MAXADMIN
Chris Winston
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2/25/20 11:36 AM
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Description
Original Assignee
Owner Description
Last Memo
Route Workflow
Next Assignment Due: 3/24/20 12:40 AM
Refresh
Review PR for Approval
MAXADMIN
Site BEDFORD, PR 1040
1 - 1 of 7
Next Page
Open Work where I am LEAD
Filter

Welcome, MAXADMIN

MAXADMIN

skin = iot18 (80% zoom)

Technician | Administration | Inventory | Technician Everyplace

Quick Insert

New Work Order (via Quick Reporting)

FAV: Work Management

Quick Reporting

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FAV: WM Master Data

Locations

Assets

Job Plans

Preventive Maintenance

Report List

Failure Code Hierarchy

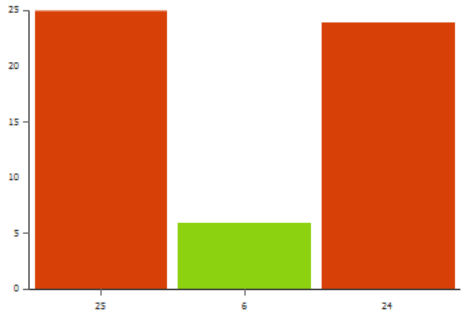
Cost by System

1 - 2 of 2

KPI Graph

Last Run: 2/26/20 11:39 AM Update

Status	Last Reading	Actual	Target	Variance
↑	0	25	5	20
↑	0	6	5	1
↑	0	24	5	19



Bulletin Board

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Inbox / Assignments

Description	Application	Last Memo	Route Workflow
Next Assignment Due: 2/23/20 3:04 AM			Refresh
Move from APPR to CLOSE	PR		

1 - 1 of 1

Open Work Where I am LEAD

Filter

Work Order	Description	Location	Asset	Reported Date	Reported By	Supervisor	Priority	Work Type
1013	Inspect and Repair Pump as Required	REPAIR	11470	1/18/97 2:00 PM	WINSTON	ED	5	CM
43011	11400 PM WORK	BR400	11400				2	PM

Set Chart Options

1 - 2 of 2

Open Work where my Person Group is Work Group

Filter

Work Order	Description	Location	Asset	Reported Date	Reported By	Supervisor	Lead	Priority	Work Type	Work Group
1005	Electric Cart Tune-Up	SHIPPING	12300	12/31/98 3:17 AM	Joe Jones	ED	WILSON	7	CM	1001
1042	Transfer cables from old pole to new pole	POLE300	52300	4/21/00 3:30 PM		ED	WILSON	3		1001
1043	Remove old pole	POLE300	52300	12/12/00 8:47 AM		ED	WILSON	3		1001
1004	Generator Overhaul	BR230	11230	12/31/98 10:50 AM	Dave Smith	MILLER	HUNTER	1	CM	MAINT

Set Chart Options

1 - 4 of 4

KPI List

Last Run: 2/26/20 11:39 AM Update

Status	KPI	Actual	Target	Variance
↑	Open Work for 'higher' Work Order Priority (7) at Bedford site	25	5	20
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KPI Graph

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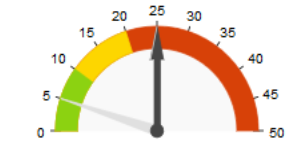
Open Work for 'higher' Work Order Priority (7) at Bedford site



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Welcome, MAXADMIN

skin=Tivoli09

Bulletins: (1) Reports Profile Sign Out Help IBM

Technician | Administration | Inventory

Change Content/Layout | Display Settings | Create New Template | Modify Existing Template | Update Start Center

Quick Insert

New Work Order (via Quick Reporting)

FAV: Work Management

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Work Order Tracking

FAV: WM Master Data

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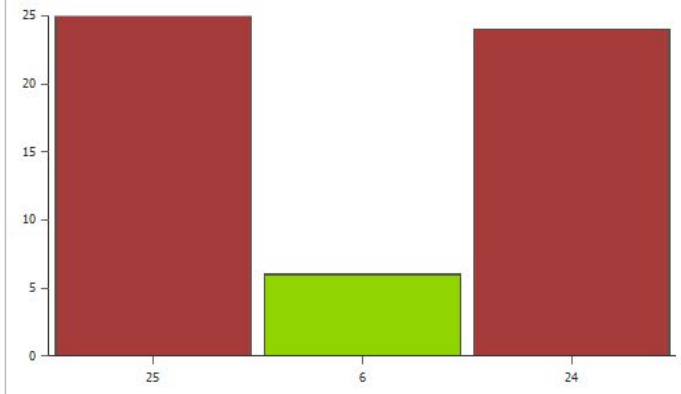

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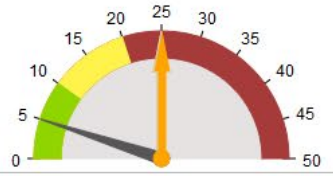

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New Work Order (via Quick Reporting)

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FAV: WM Master Data

Locations

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KPI Graph of Open Work Counts for Priorities 7, 8, and 9

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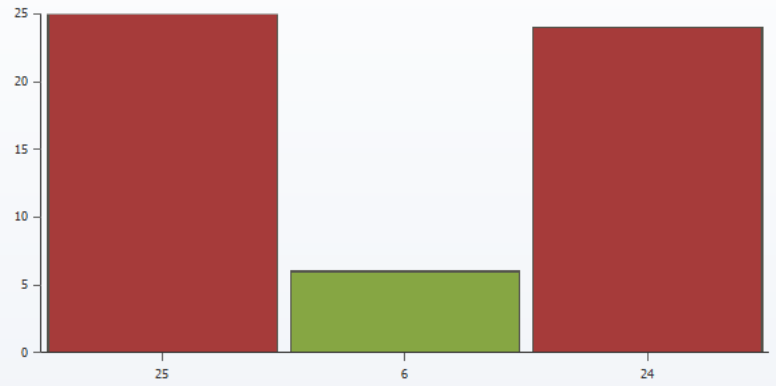

Bulletin Board

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Reminders	Default skin is iot18, but tivoli13 and ...	2/25/20 11:36 AM	4/3/20 3:00 PM	N

Inbox / Assignments

Description	Original Assignee	Owner Description	Last Memo	Route Workflow
Next Assignment Due: 3/24/20 12:40 AM				Refresh
Review PR for Approval	MAXADMIN	Site BEDFORD, PR 1040		

1 - 1 of 7 | Next Page >>

Open Work where I am LEAD

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KPI List of Counts for Open Work for priorities 7, 8, and 9

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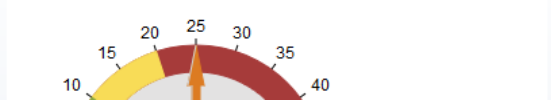

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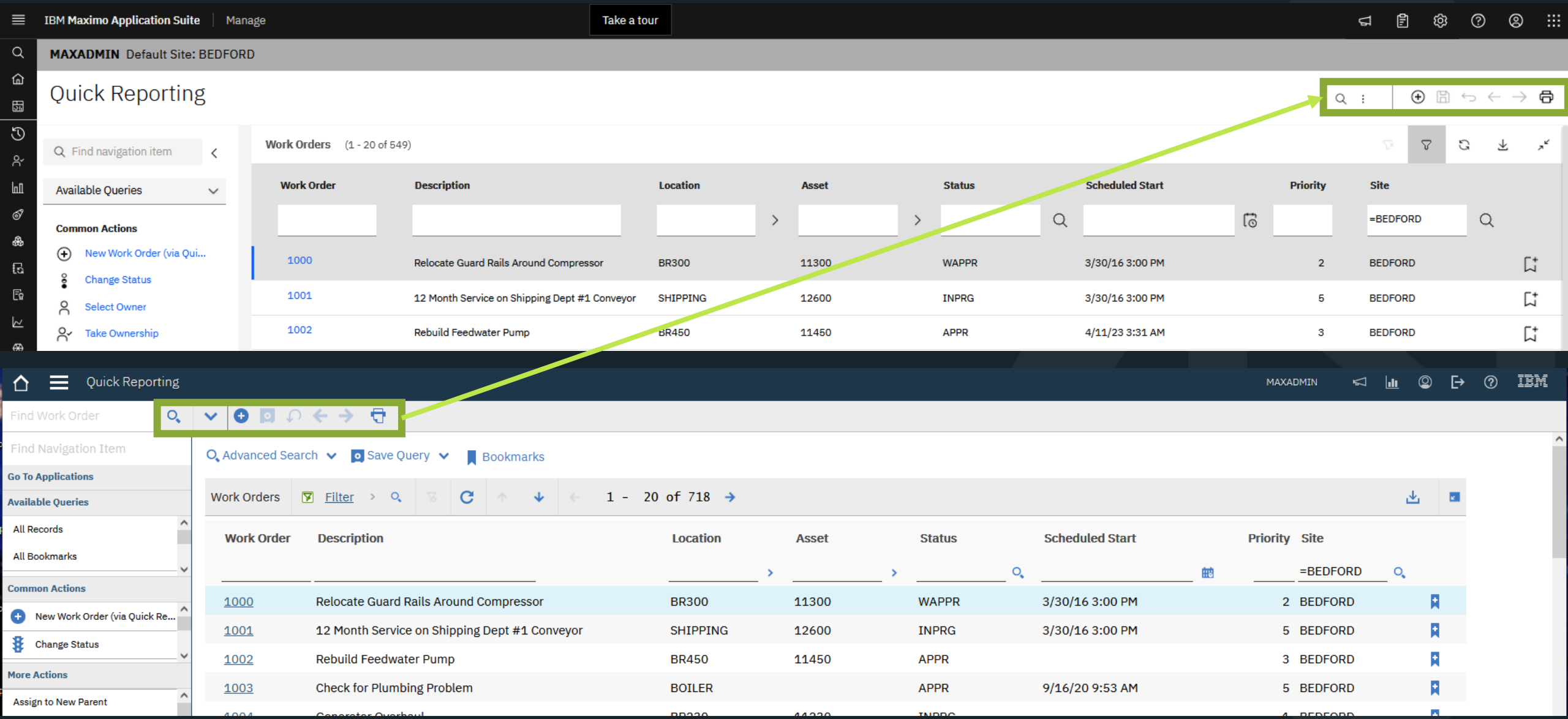
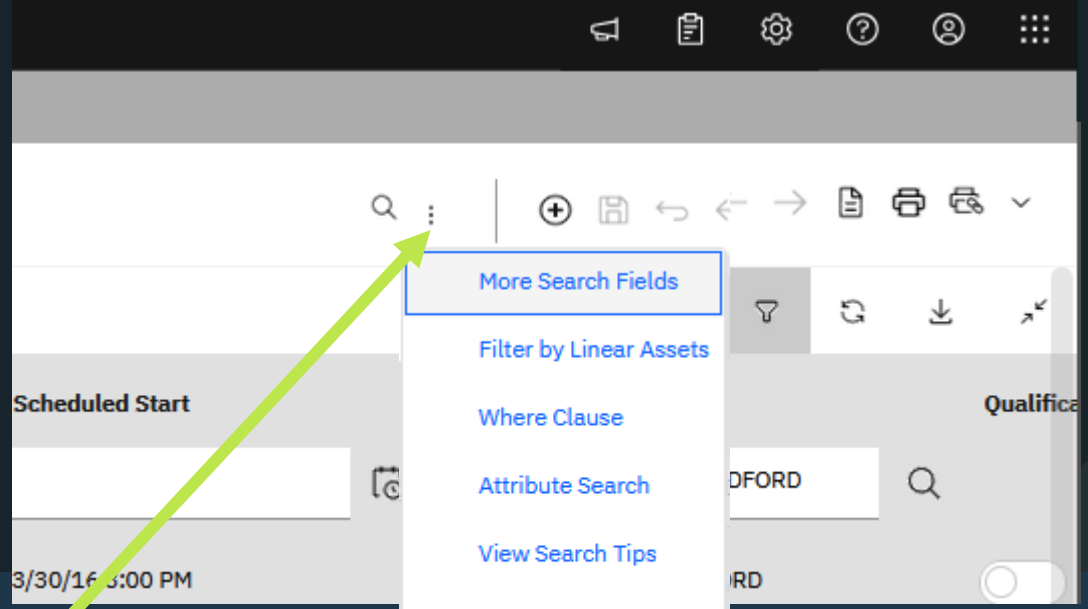
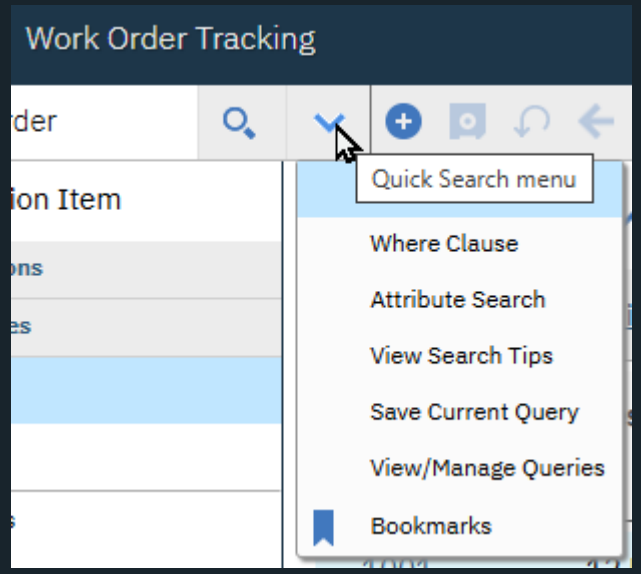
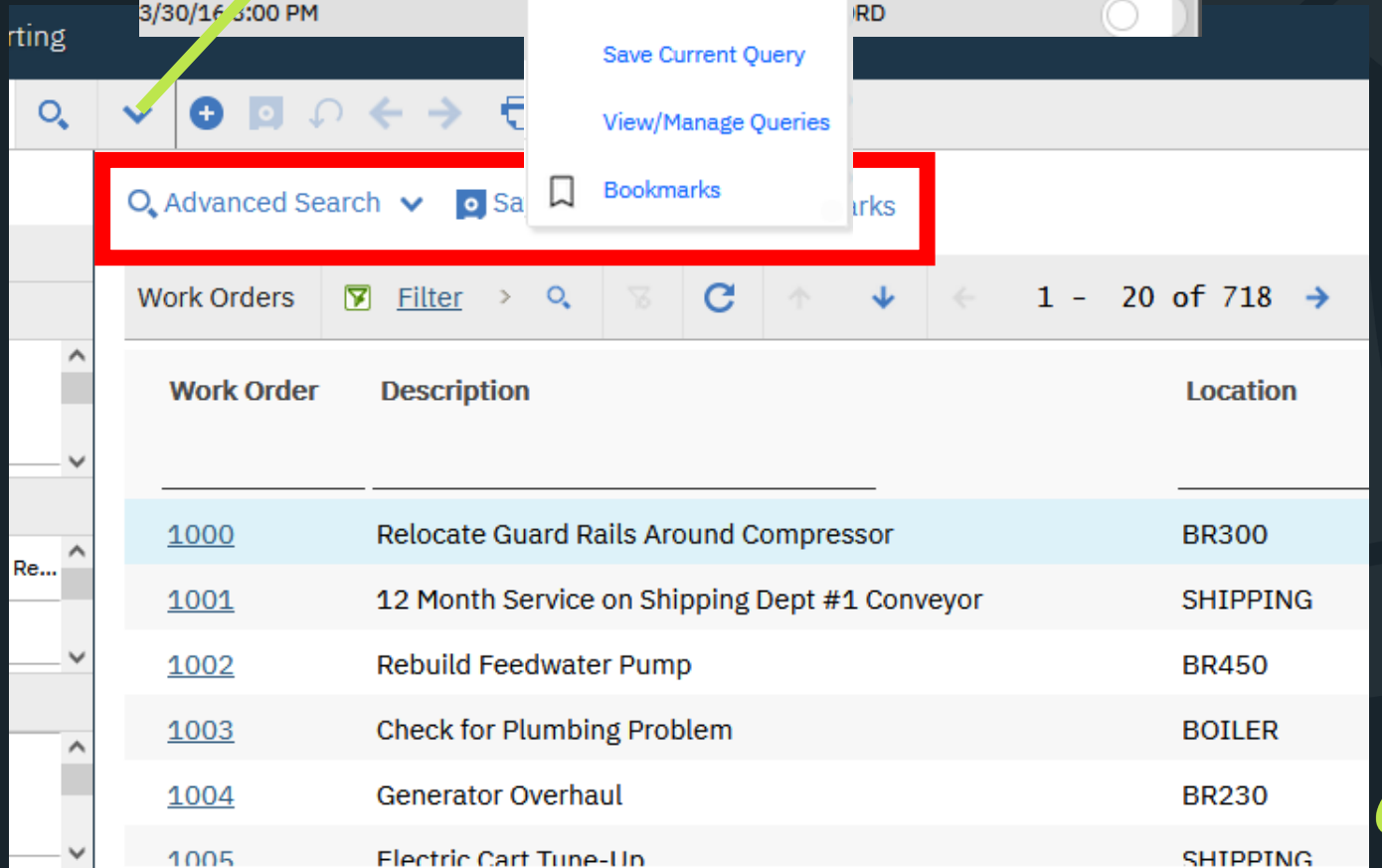
Toolbar has moved, but it is still there



Quick Search Menu

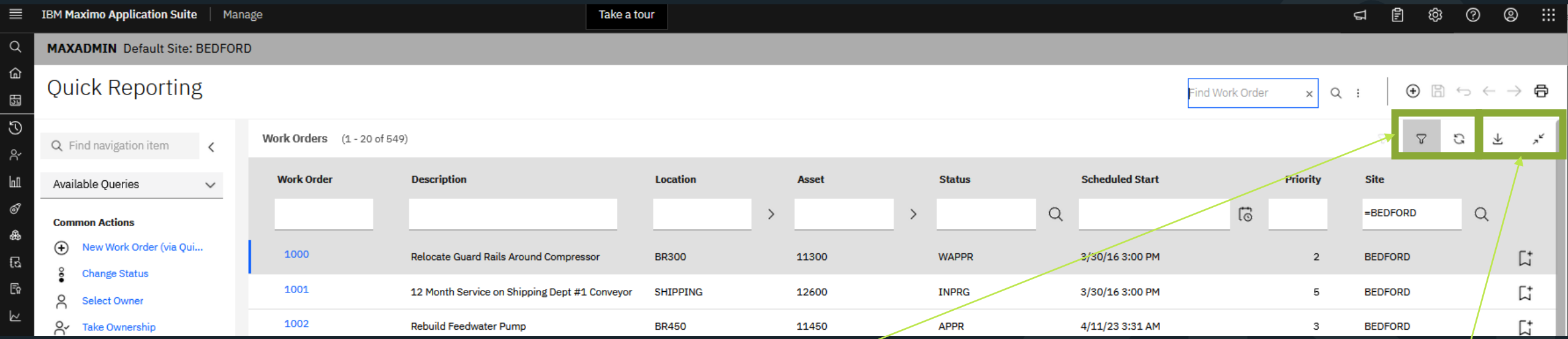


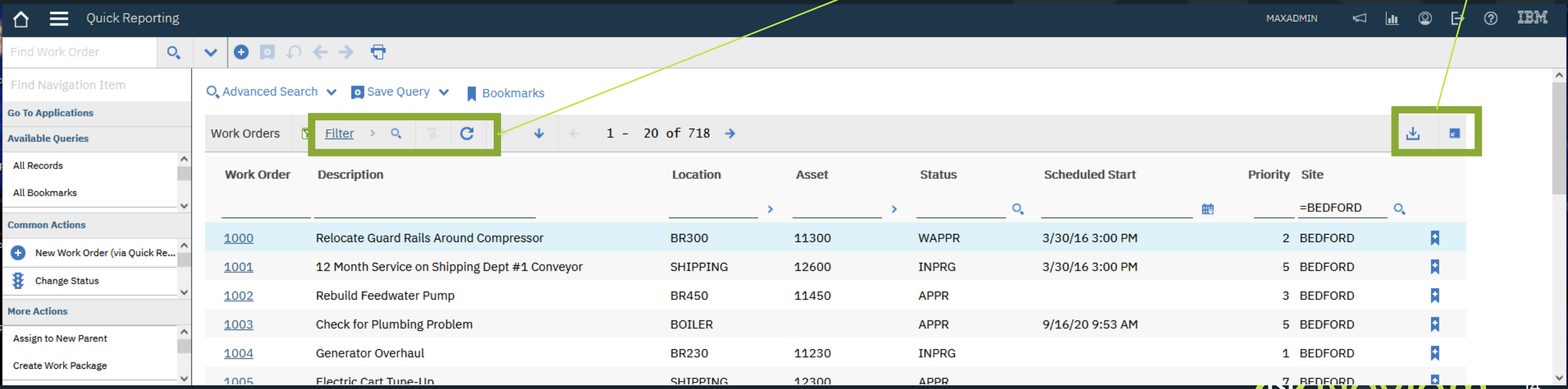




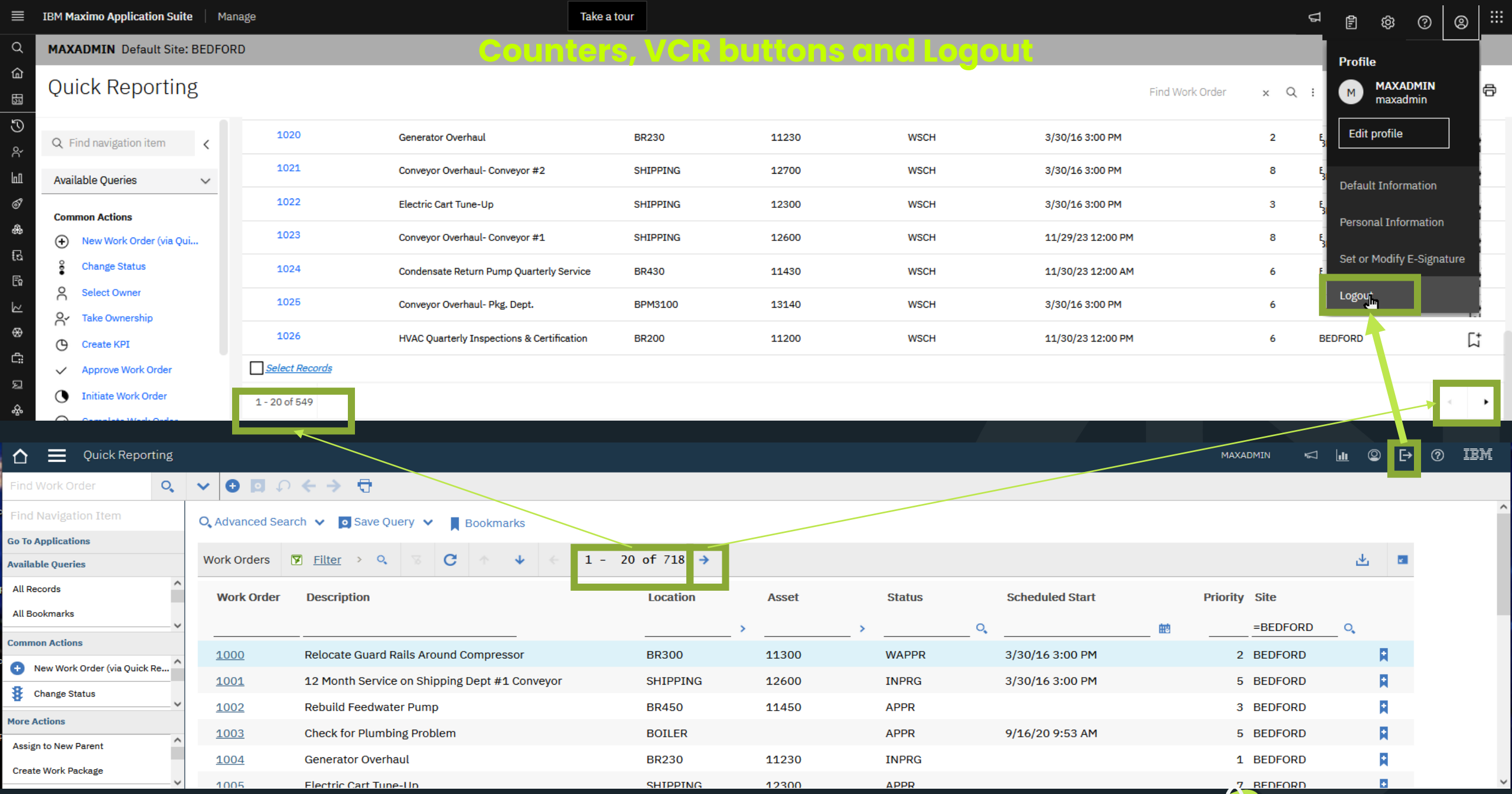
Naviam

Filter, Download & Show/Hide

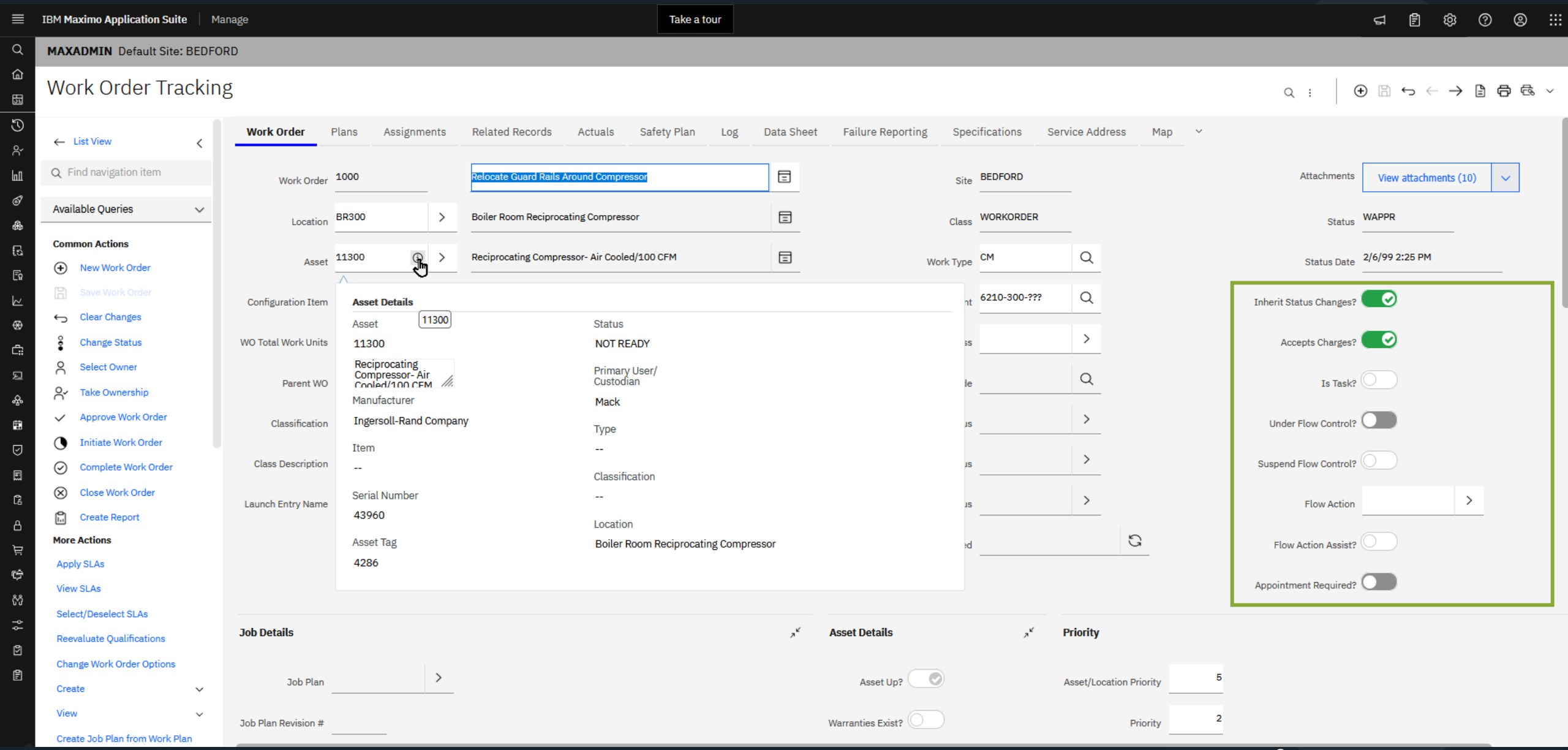




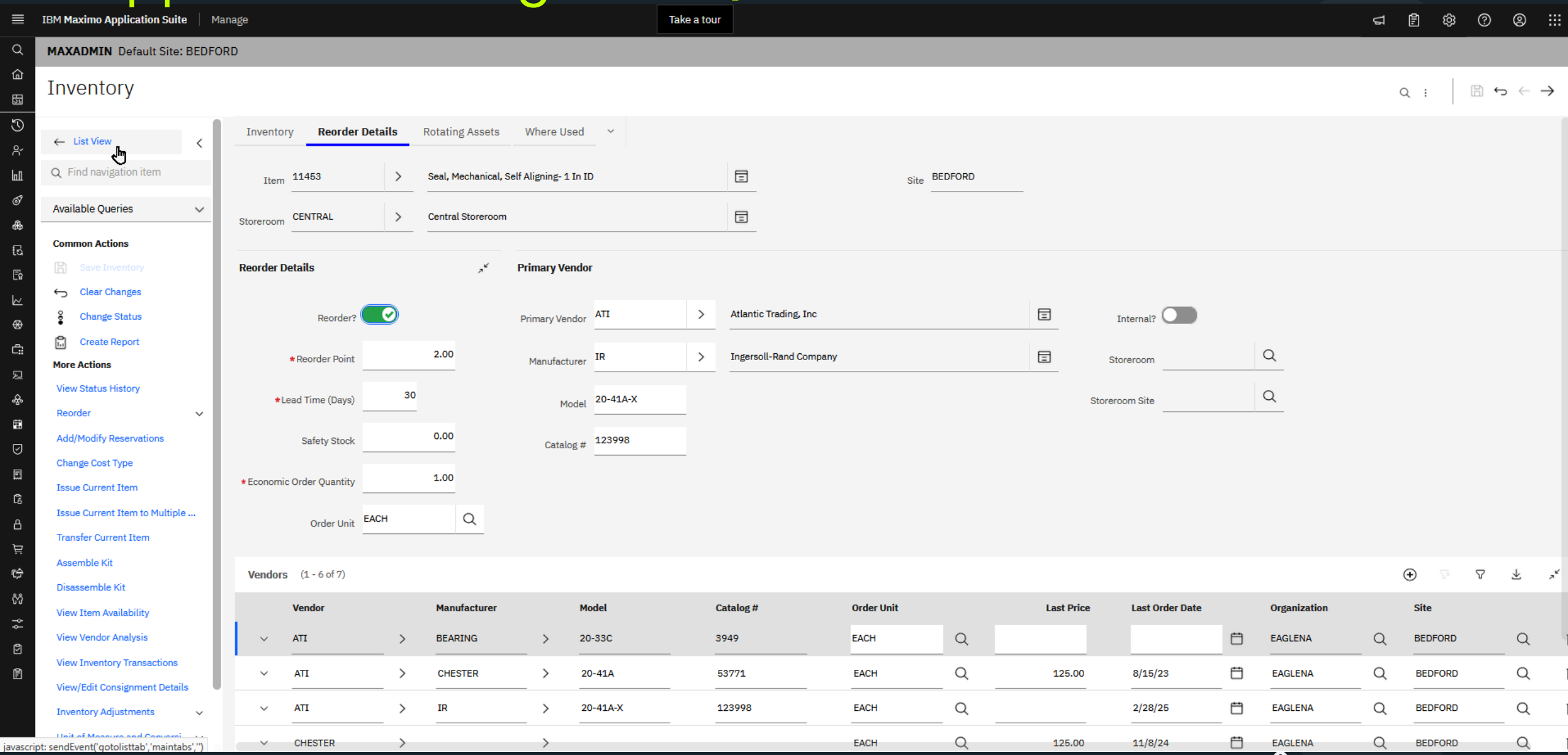
Counters, VCR buttons and Logout



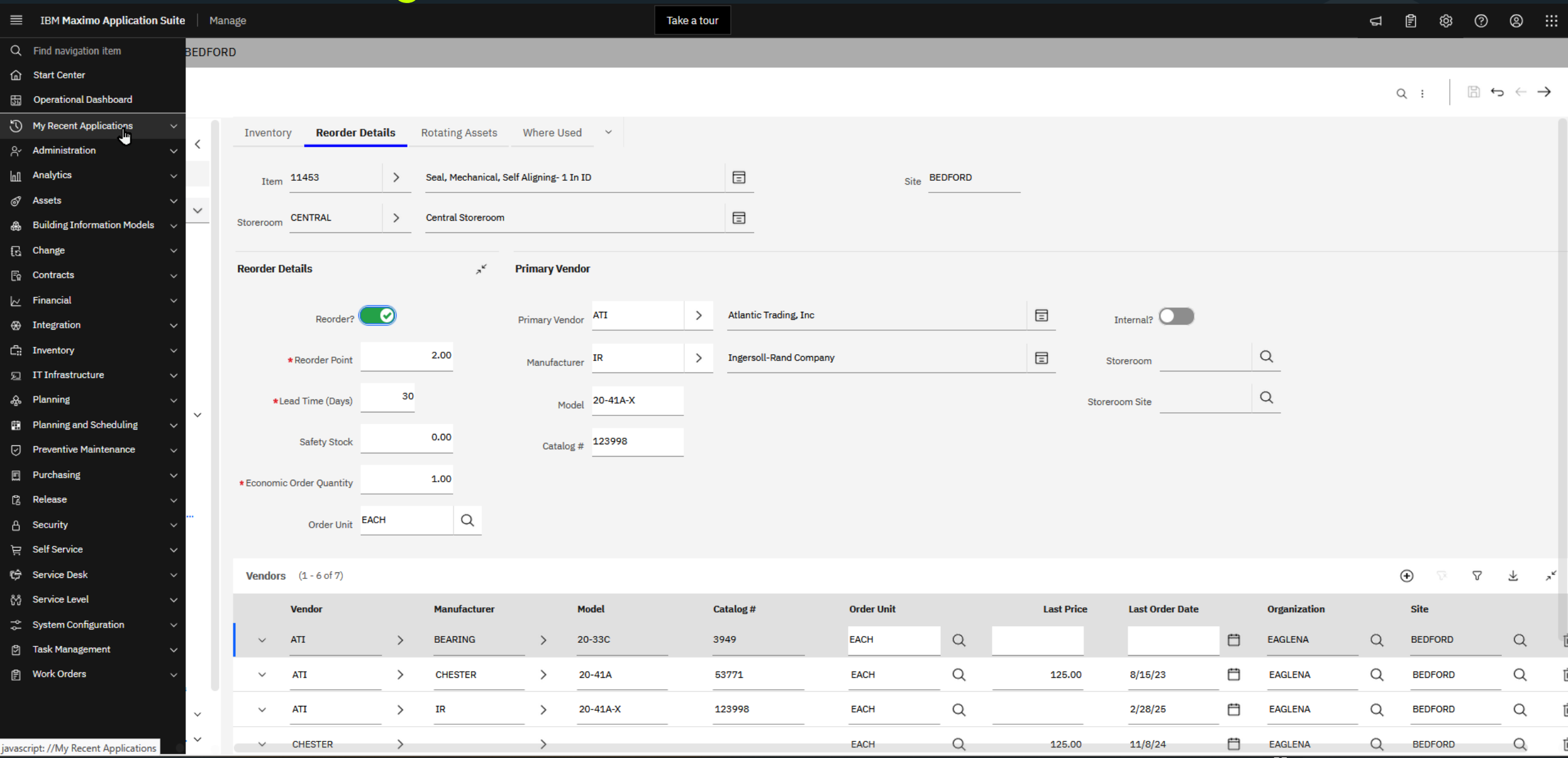
Toggles instead of checkboxes



Application Navigation Queries and Actions



Left Side Navigation Menu



Work Order Tracking

List View
Find navigation item
Available Queries

Common Actions
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
Create Report

More Actions
Apply SLAs
View SLAs
Select/Deselect SLAs
Reevaluate Qualifications
Change Work Order Options
Create
View
Create Job Plan from Work Plan
Remove Work Plan
Select Safety Hazards
Remove Safety Plan
Apply Route
Enter Meter Readings

Work Order | Plans | Assignments | Related Records | Actuals | Safety Plan | Log | Data Sheet | Failure Reporting | Specifications | Service Address | Map

Tabs Dropdwon

Work Order	1002	Rebuild Feedwater Pump	
Location	BR450	Feed Water Pump- Centrifugal/100GPM/60FTHD	
Asset	11450	Centrifugal Pump 100GPM/60FTHD	
Configuration Item			
WO Total Work Units			
Parent WO			
Classification	PLUMBING		
Class Description	Plumbing		
Launch Entry Name			

Site	BEDFORD
Class	WORKORDER
Work Type	CM
GL Account	6210-300-???
Failure Class	PUMPS
Problem Code	
Storeroom Material Status	
Direct Issue Material Status	
Work Package Material Status	
Material Status Last Updated	

Attachments	View attachments
Status	APPR
Status Date	2/27/03 10:48 AM
Inherit Status Changes?	On
Accepts Charges?	On
Is Task?	Off
Under Flow Control?	Off
Suspend Flow Control?	Off
Flow Action	
Flow Action Assist?	Off
Appointment Required?	Off

Job Details

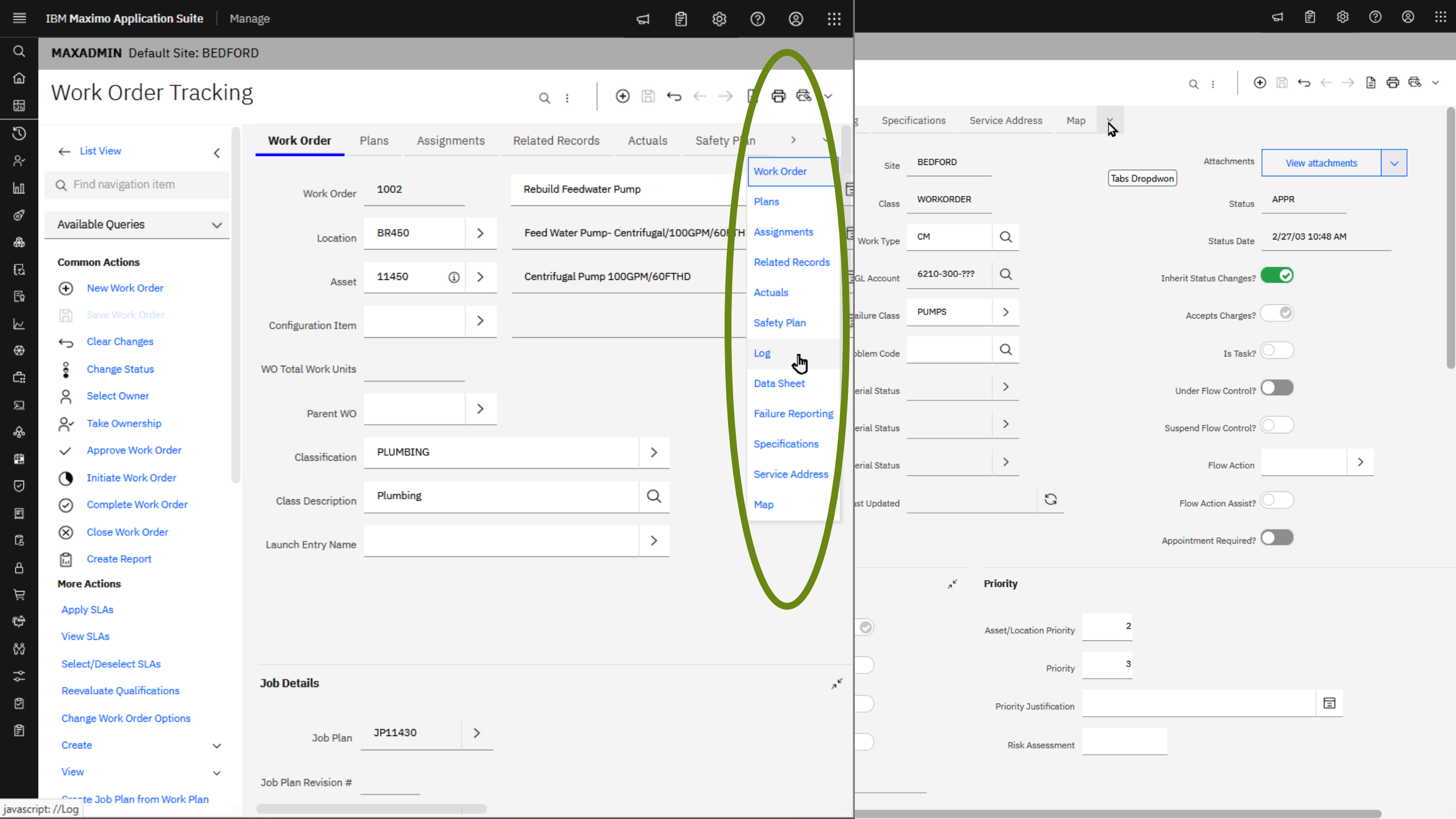
Job Plan	JP11430
Job Plan Revision #	
PM	
Safety Plan	
Contract	

Asset Details

Asset Up?	On
Warranties Exist?	Off
SLA Applied?	Off
Charge to Store?	Off
Current Value	

Priority

Asset/Location Priority	2
Priority	3
Priority Justification	
Risk Assessment	


IBM Maximo Application Suite
Manage
MAXADMIN Default Site: BEDFORD
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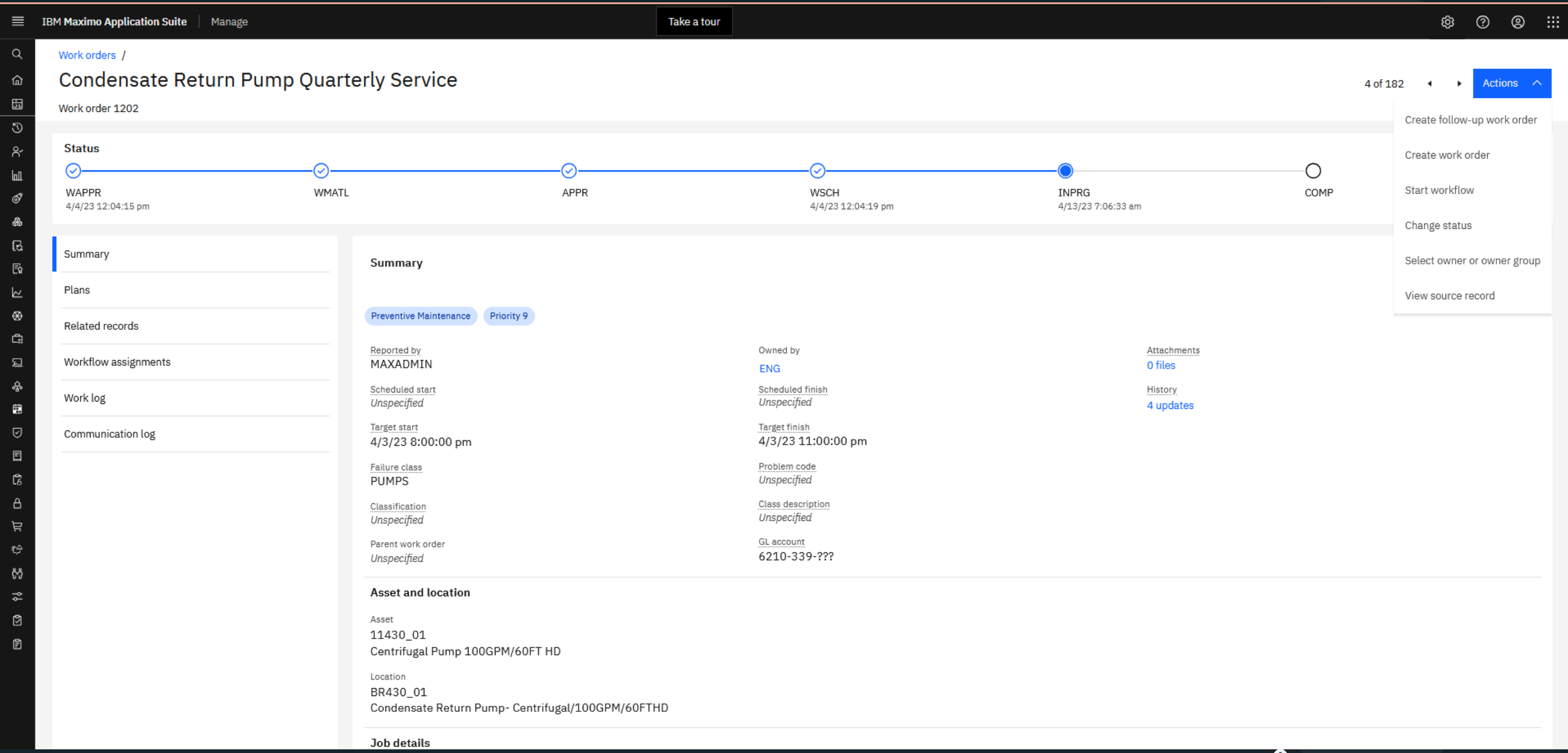
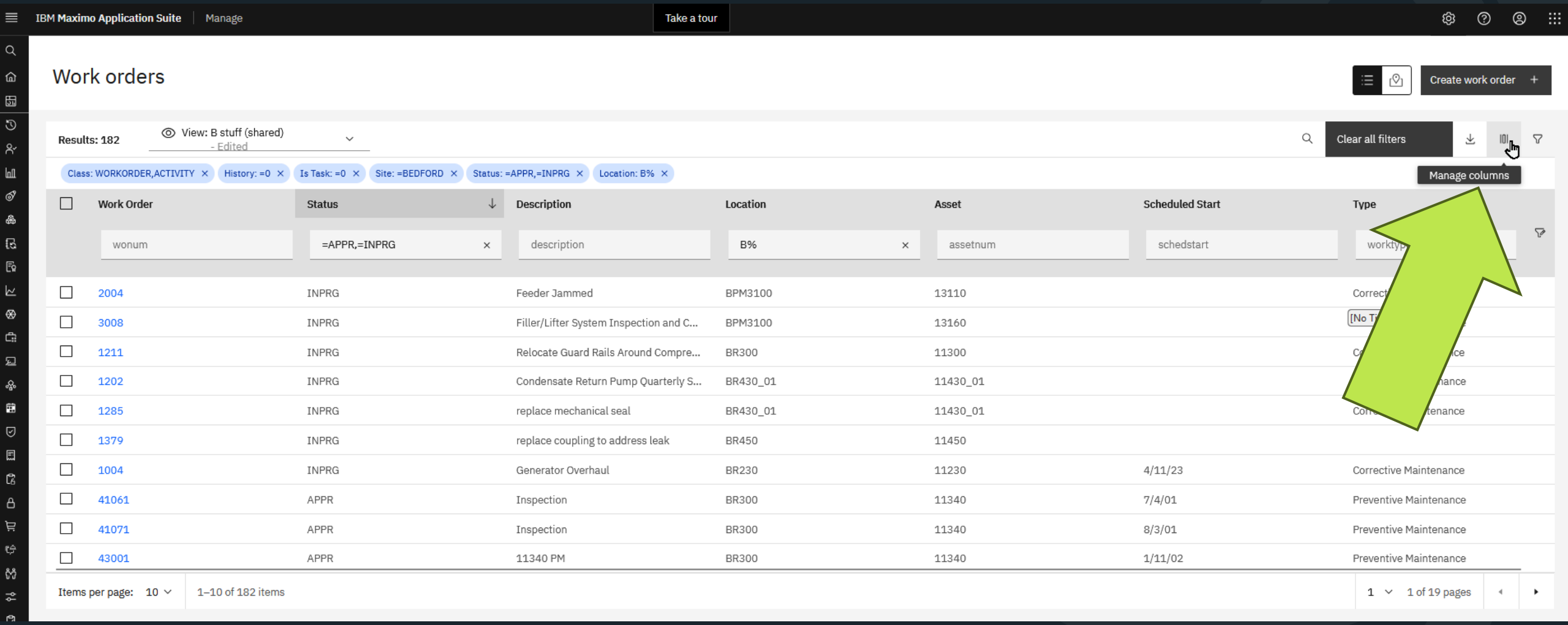
View SLAs
Select/Deselect SLAs
Reevaluate Qualifications
Change Work Order Options
Create
View
Create Job Plan from Work Plan
Work Order
Plans
Assignments
Related Records
Actuals
Safety Plan
Work Order 1002
Rebuild Feedwater Pump
Location BR450
Feed Water Pump- Centrifugal/100GPM/60FTH
Asset 11450
Centrifugal Pump 100GPM/60FTHD
Configuration Item
WO Total Work Units
Parent WO
Classification PLUMBING
Class Description Plumbing
Launch Entry Name
Job Details
Job Plan JP11430
Job Plan Revision #
Work Order
Plans
Assignments
Related Records
Actuals
Safety Plan
Log
Data Sheet
Failure Reporting
Specifications
Service Address
Map
Specifications
Service Address
Map
Tabs Dropdwon
Site BEDFORD
Class WORKORDER
Work Type CM
GL Account 6210-300-???
Failure Class PUMPS
Problem Code
Material Status
Material Status
Material Status
Last Updated
Attachments
View attachments
Status APPR
Status Date 2/27/03 10:48 AM
Inherit Status Changes?
Accepts Charges?
Is Task?
Under Flow Control?
Suspend Flow Control?
Flow Action
Flow Action Assist?
Appointment Required?
Priority
Asset/Location Priority 2
Priority 3
Priority Justification
Risk Assessment
javascript: //Log

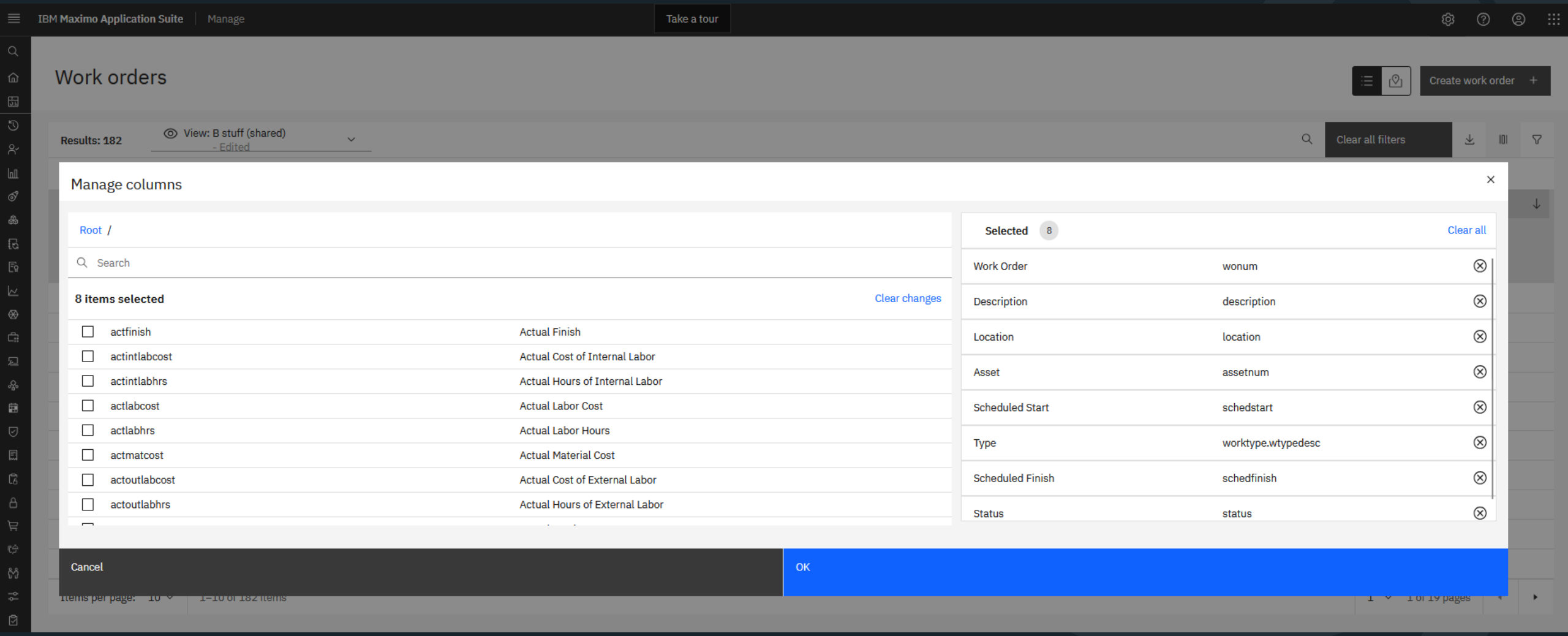
Role Based App – Work Orders – Detail View



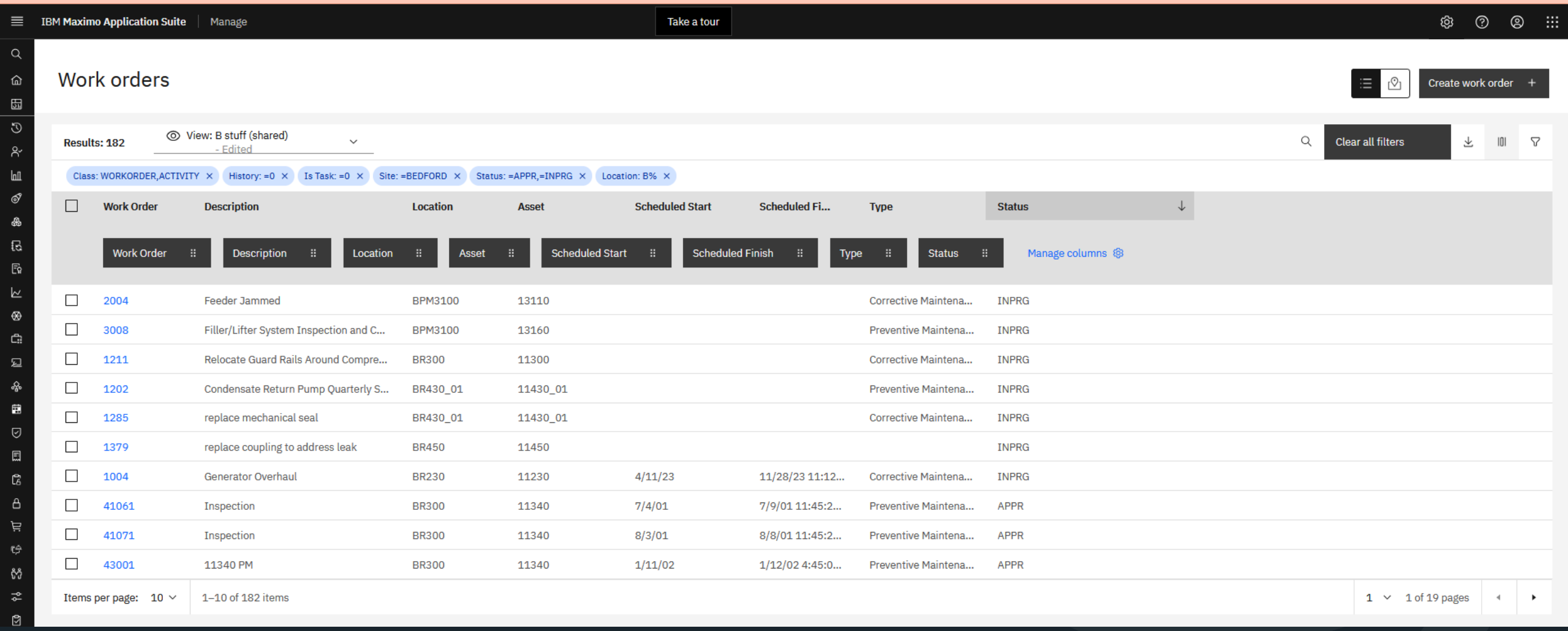
“Manage Columns” provides the user some flexibility



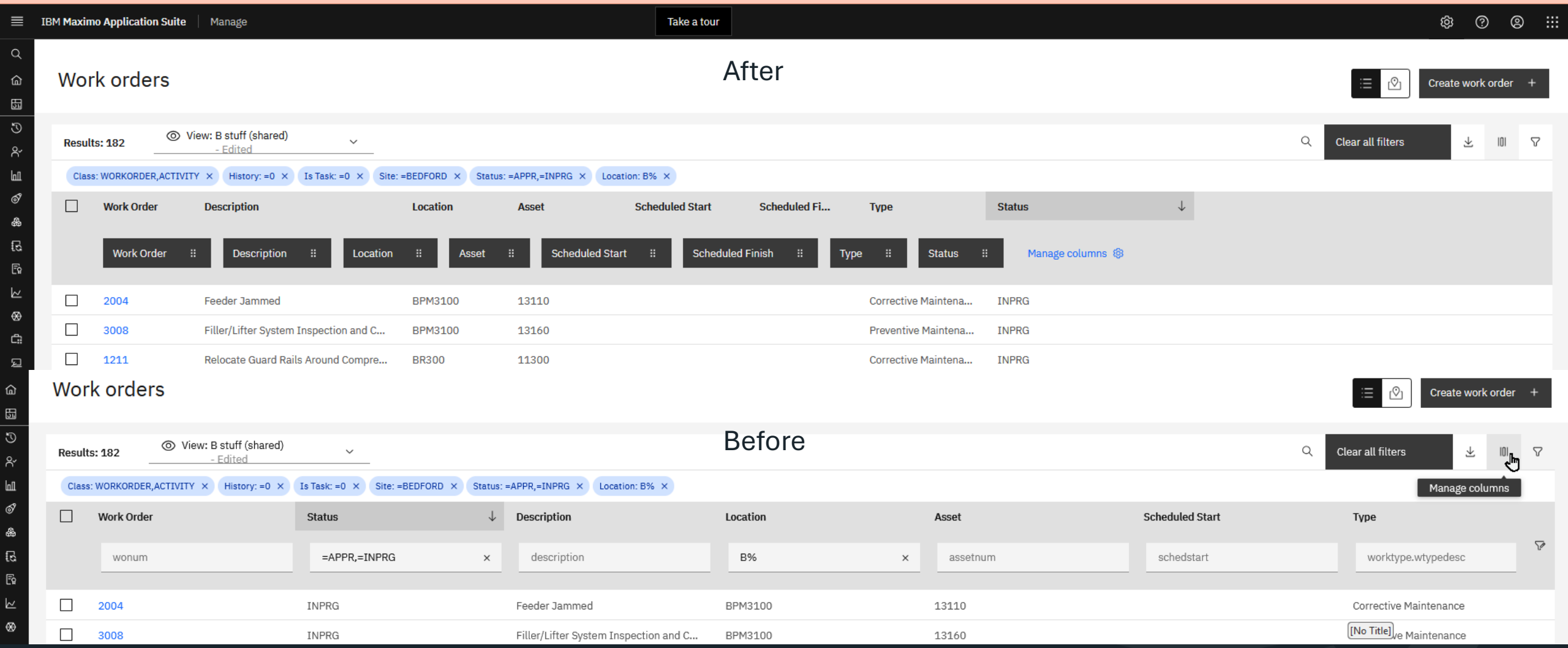
‘Manage Columns’ allows you to customize your view



Role Based Application – Work Orders



Role Based Application – Work Orders



Start Center vs Operational Dashboard

Start Center ‘Portlets’

- Quick Insert
- Favorite Applications
- Inbox / Assignments
- KPI Graph
- KPI List

- Result Set

- ~~Bulletin Board~~
- Report List ???

Operational Dashboard ‘Cards’

- Quick Actions
- Favorites
- **Workflow**
- KPI Value
- KPI Chart (Trend)
- KPI Comparison
- Work Queues
- *Value*
- *Table*
- Report List (>=9.x)

Operational Dashboard - Top

Naviam Demo Site | Manage

Operational dashboard

Page last updated: 5/2/25 9:50:45 am

Demo

Demonstration / Development Dashboard Private

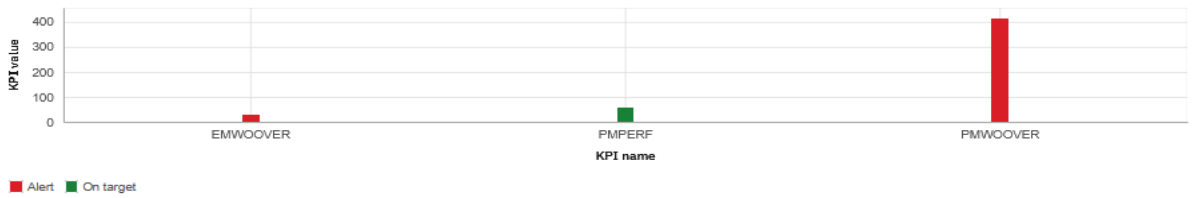
Overdue Emergency Work
Over target by 29.00
31 work orders
0.00% from last refresh

Overdue PM Work
Over target by 410.00
415 work orders
0.00% from last refresh

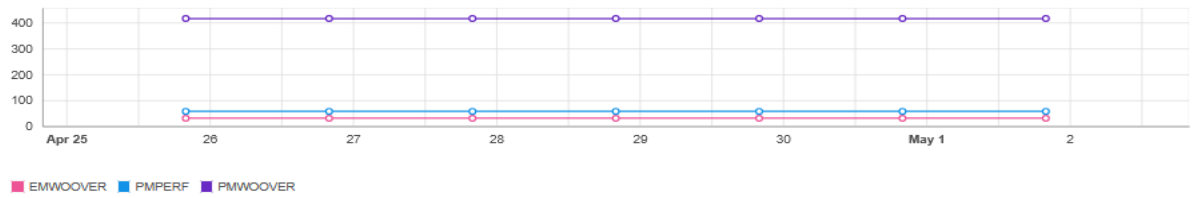
PM Performance
Under target by 37.47
57.53 %
0.00% from last refresh

Health of Assets for PM Work
Under target by 90.00
0
0% from last refresh

Selected KPI comparison
Last updated on 5/2/25 9:50:50 am



Safety critical backlog
Last updated on 5/2/25 9:50:50 am



Favorites
Favorites subtile

- Work Orders
- Workflow Assignments
- Scheduling Dashboard
- Work Order Tracking
- Service Requests
- Quick Reporting
- Locations
- Assets
- Purchase Requisitions
- Inventory
- Map Manager

Quick actions

Create work order
Work Order Tracking

Create service request
Service Requests

Create purchase request
Purchase Requisitions

Create job plan
Job Plans

Create PM
Preventive Maintenance

Create Location
Locations

Workflow assignments due soon

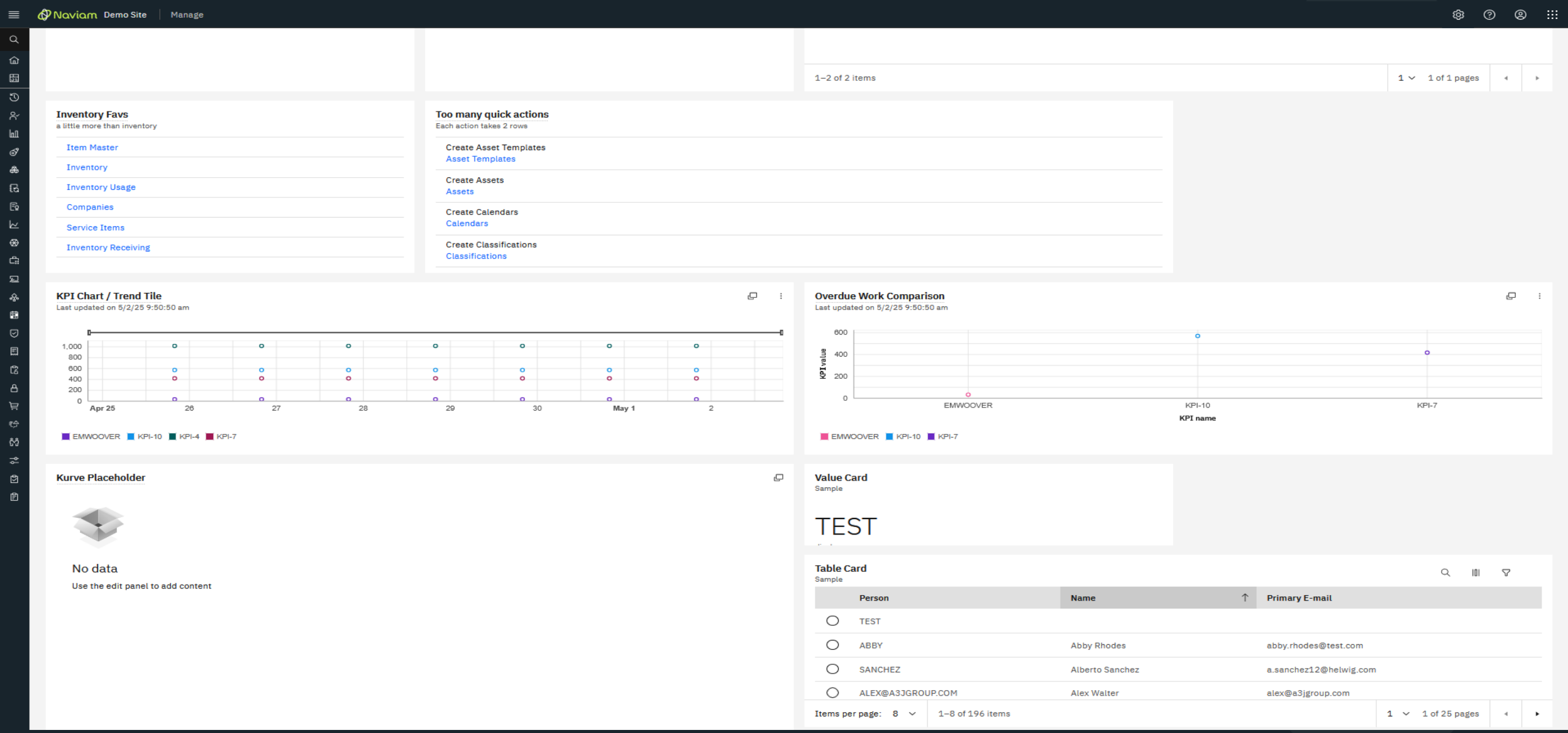
Assignment	Due Date
Review PR for Approval Site BEDFORD, PR 1009	6/27/24 5:33:10 pm
Review PR for Approval Site BEDFORD, PR 1008	6/27/24 5:32:49 pm

Items per page: 4 | 1–2 of 2 items | 1 | 1 of 1 pages

Work queues
Last updated on 5/2/25 9:50:50 am

Queue Name	Description	Count	Priority
OPEN BOILER WORK	Open Work on Boiler Hierar...	158	3
OPEN WORK WHERE I AM L...	APPR and INPRG work ord...	3	2

Operational Dashboard - Bottom



Work queues

Success!
Work queue OPEN WORK WHERE I AM LEAD has been created.

Results: 2

Work queue name	Description	Priority	Count	State
OPEN BOILER WORK	Open Work on Boiler Hierarc...	3	156	Active
OPEN WORK WHERE I AM LE...	APPR and INPRG work order...	2	3	Active

Items per page: 10 | 1–2 of 2 items | 1 | 1 of 1 pages

Work queues
Work Queue subtitle

Queue Name	Description	Count	Priority
OPEN BOILER WO...	Open Work on Boil...	156	3
OPEN WORK WHE...	APPR and INPRG ...	3	2

1–2 of 2 items | 1 | 1 of 1 pages

Work queues
Work Queue subtitle

Queue Name	Description	Count	Priority
OPEN BOILER WO...	Open Work on Boil...	156	3
OPEN WORK WHE...	APPR and INPRG ...	5	2

OPEN WORK WHERE I AM LEAD

1–2 of 2 items | 1 | 1 of 1 pages

Substitution Variables work in Work Queue Queries

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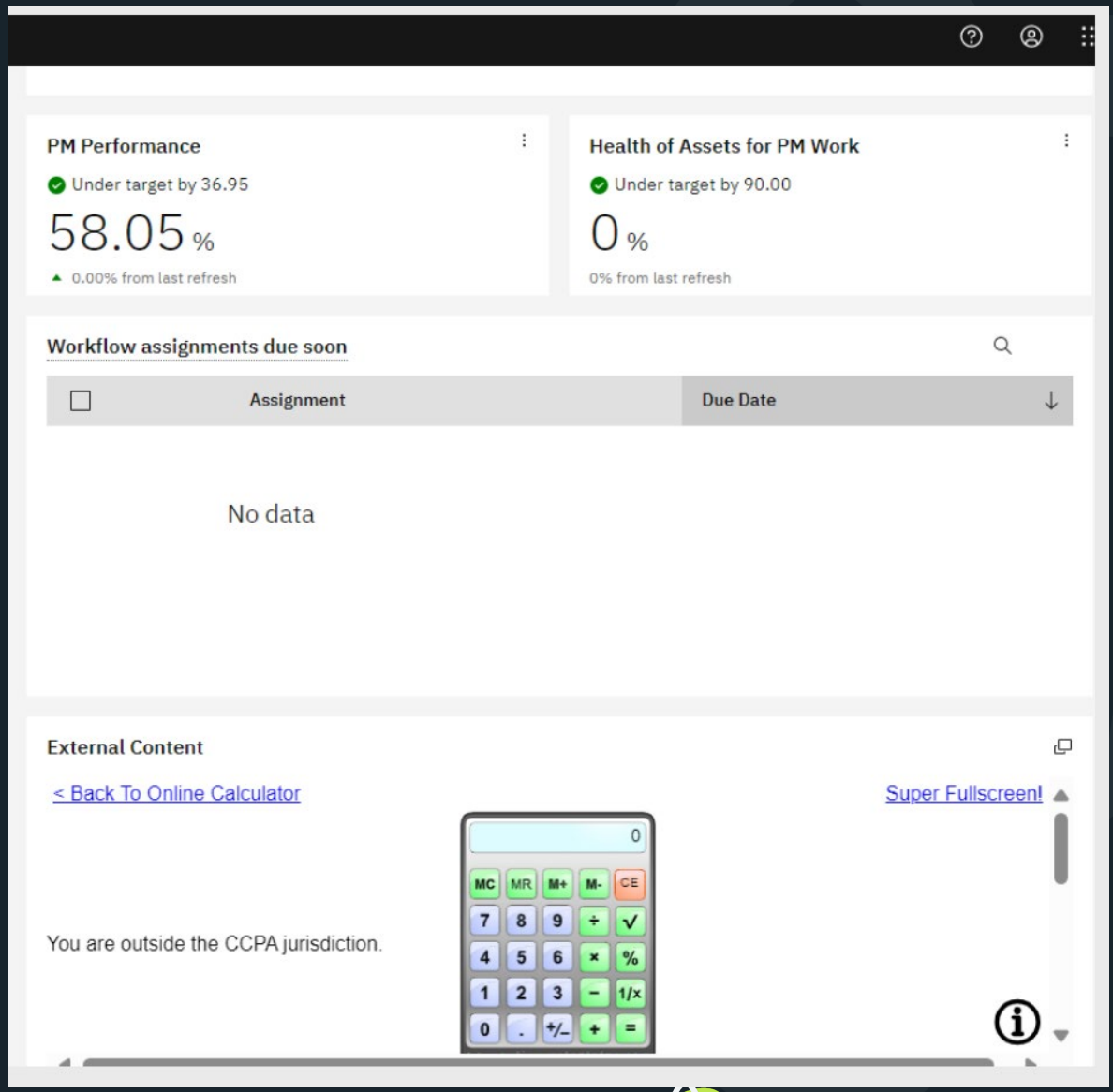
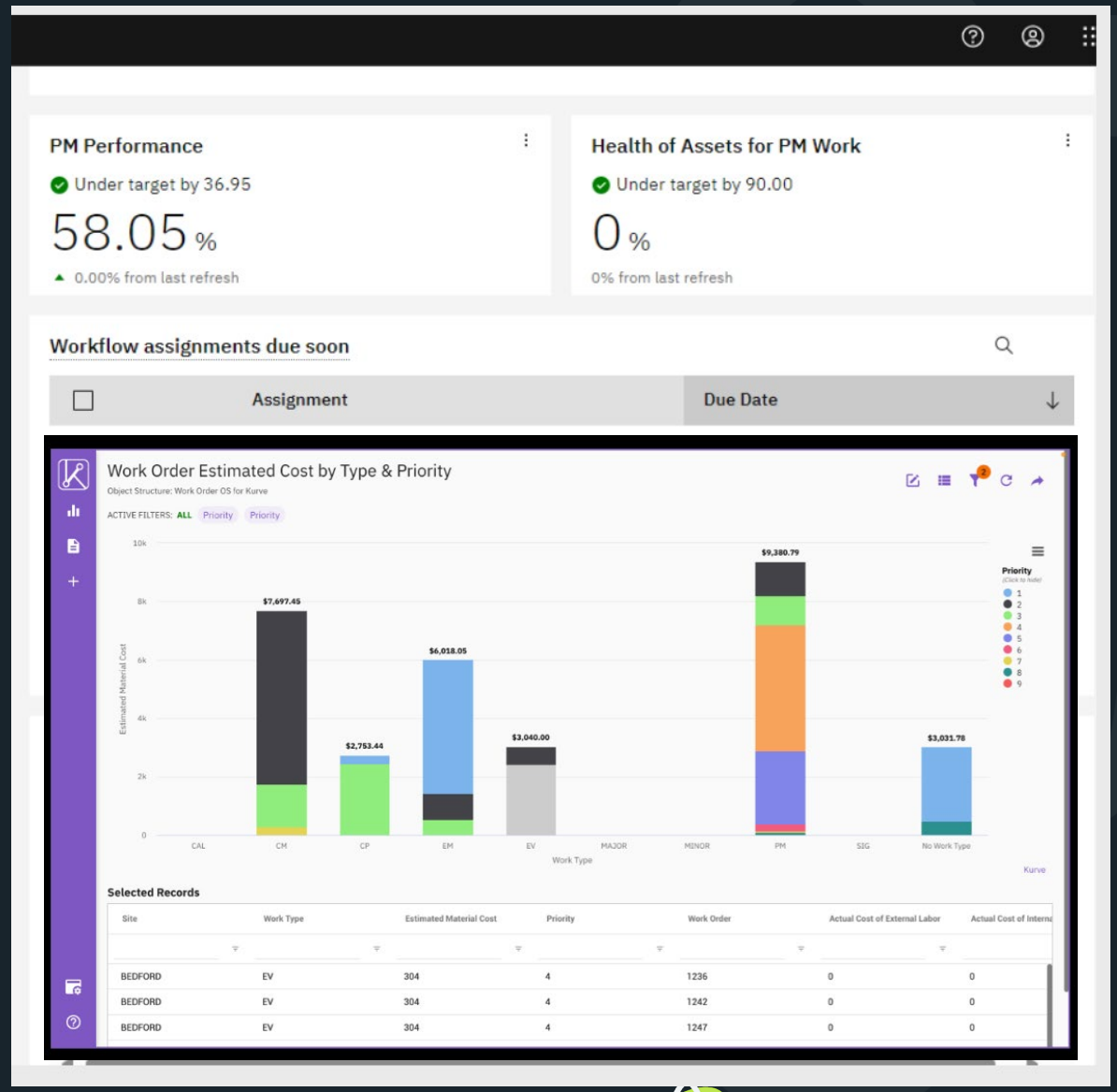
Third Party Card

- Bring external presentation into Maximo



Third Party Card

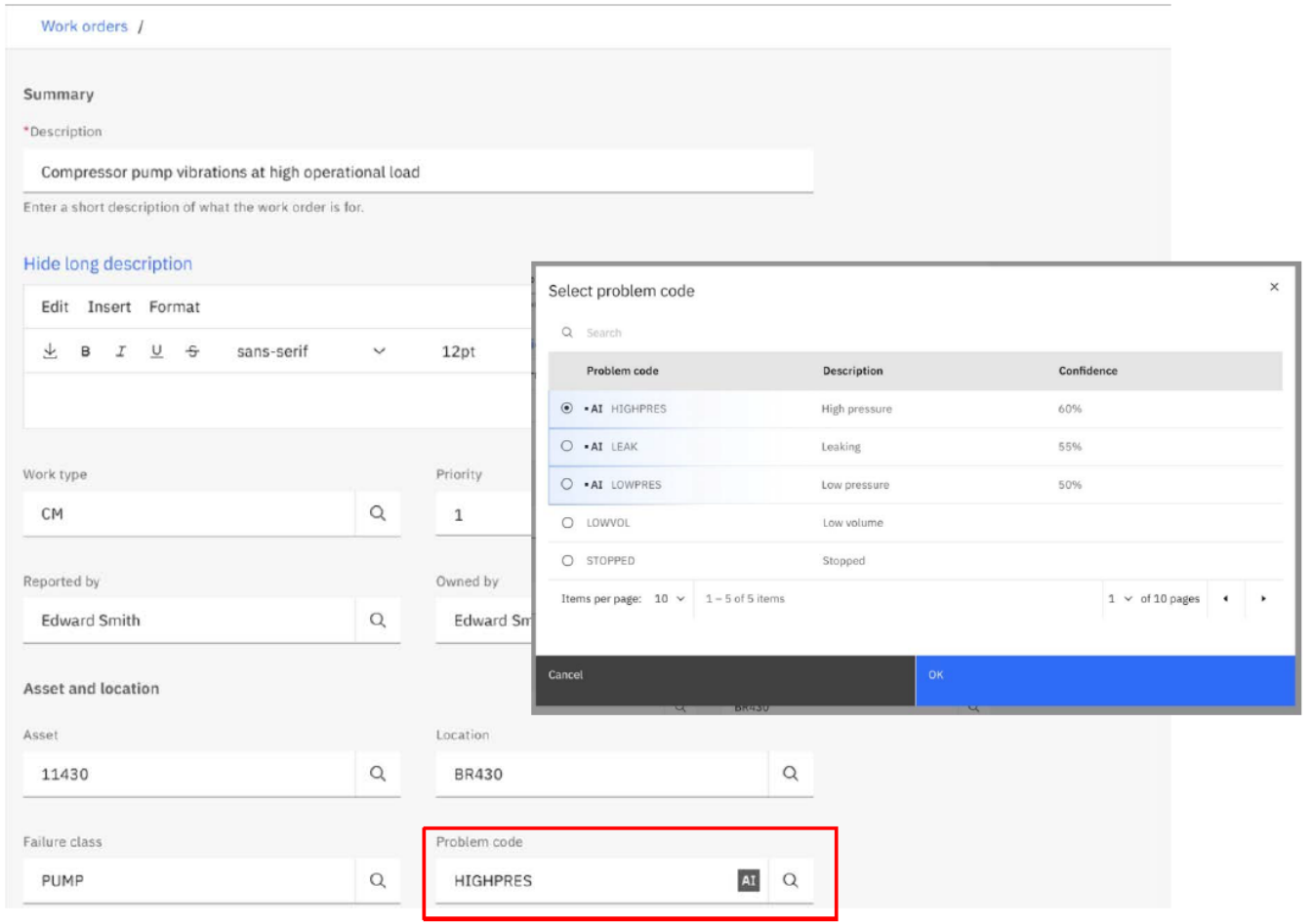
- Bring external presentation into Maximo
- Needs to be an embeddable url
- This is Kurve as an example



WO Intelligence – Problem Code Recommendations

New GenAI feature recommends problem codes to assist with existing challenges faced by customers to address poor quality (or missing) work order data, impacting effective maintenance prioritization decisions as well as time spent on review and approval.

- AI model trained using long and short descriptions from a small set of related work orders
- Work Orders displays the AI recommendations for review/accept
  - Uses new IBM AI Design UI elements incorporated into Graphite
  - Provides confidence score of the predictions
- Work Queue surfaces the top AI recommendation to accept



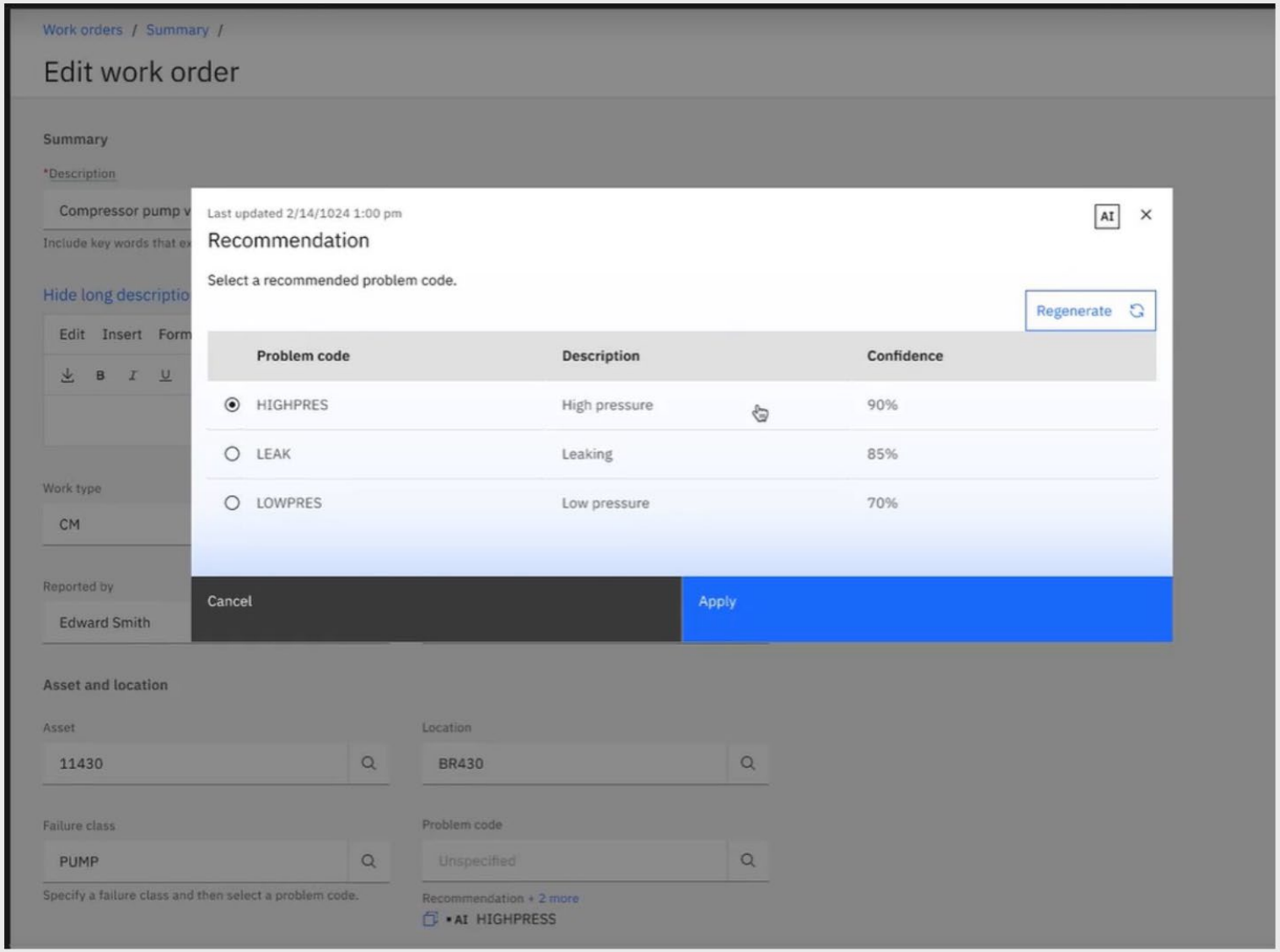
Train the model on your data

Work Order Intelligence

AI model trained on customer data.

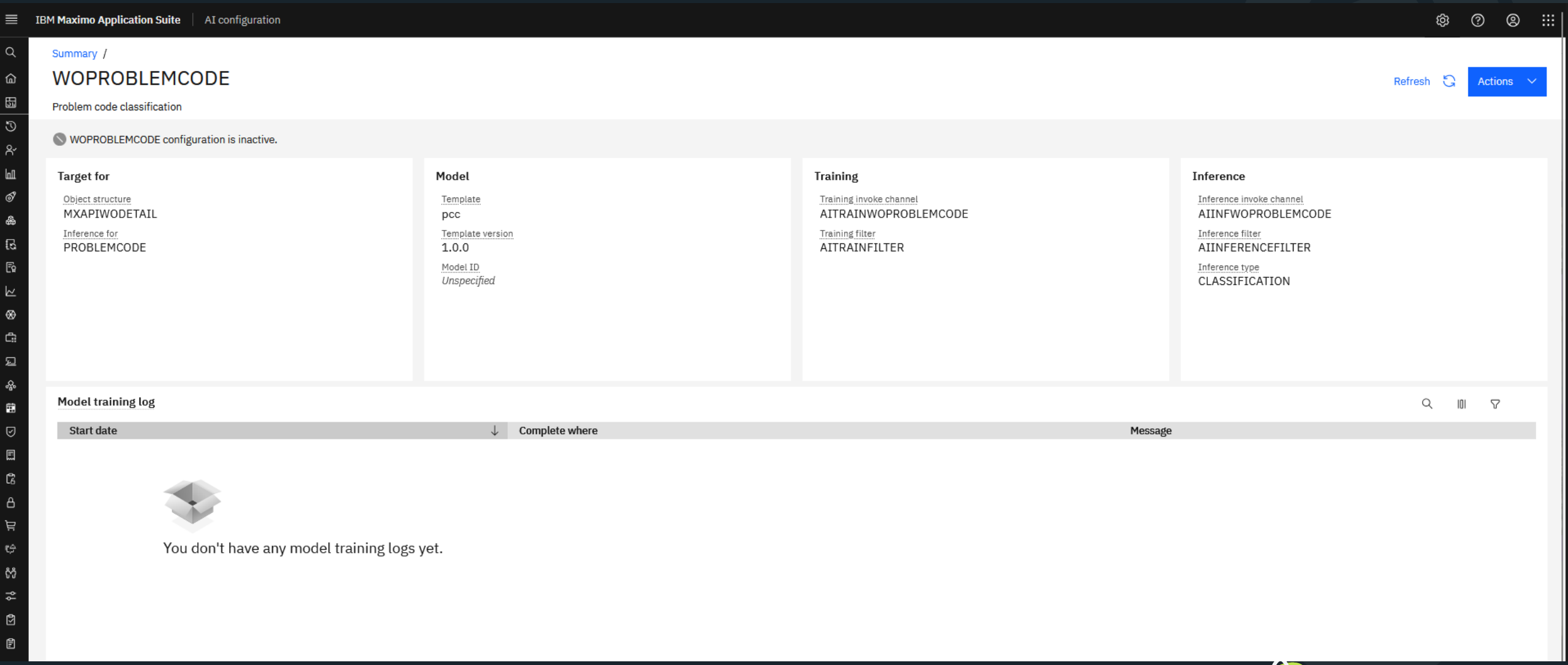
Suggests top 3 failure code inferences based on work orders textual data on desc, long desc, log, tasks.

Automated deployment and learning on new Manage objects and data structures, communicating with watsonx through a local broker.



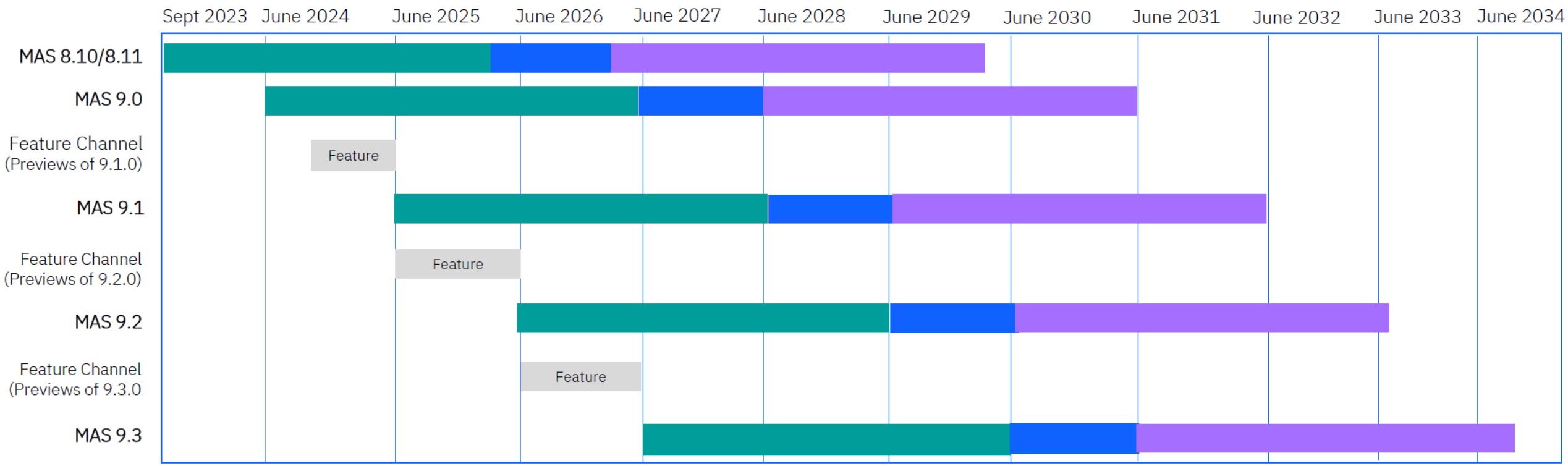
How to train your AI dragon?

How to train your dragon? – AI Configuration App



MAS Lifecycle: 3+1+3 with 12-month release cadence

**Please review MAS SaaS policies for their release cadence



- Follows 3+1+3 lifecycle
- Release every 12 months (9.x)
  - Monthly maintenance updates for 36 months (Base Support)
  - Initial Extended Support for another 12 months
  - Ongoing Extended Support for another 36 months

*Usage + Existing + New Sev1 Critical Defect Fixes (no proactive security fixes)

*Usage + Existing Fixes only

Reference Links

- Upgrade checklist – this has the reference to the customization archive
- Upgrading from Maximo Asset Management to IBM Maximo Manage
- Upgrading from Maximo Asset Management to IBM Maximo Manage pdf version
- Moving from EAM to Manage Blog
- What's new with Maximo Manage 8.0 - 8.7
- Application Suite 8.8 and later – continuous delivery model
- Customization Standards
- Classname Prefixes for Industry Solutions
- MAS Authentication options
- Maximo Application Suite Admin APIs 8.11.x
- IBM REST API Guide
- Maximo Automation Script Wiki
- MAS 8.11 – Multiple Identity Providers
- Generating Entity Relationship Documents (ERDs)
- Role Based Applications – Work Orders
- Role Based Applications – Operational Dashboard
- Prepare for MAS: Utilizing S3 Storage for Attached Documents in 7.6.1
- Navigating 7.x End of Support
- Asset Life-Cycle Management and AI
- Manage 9.0
- Join the IBM Maximo Product Updates Group
- IBM Maximo Product Updates Group – for Members
- Navigation differences video – Manage vs. 7.6.x

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