



Configuring Maximo 7.6 Start Centers

Presenter: Fernando Cartagena

About the Presenter: Fernando Cartagena

- Fernando Cartagena is a Principal Consultant at Ontracks Consulting with 8 years of Maximo implementation experience for clients throughout North America. Fernando primarily focuses on technical architecture design & project management and has extensive experience in the following fields:
 - Maximo project management
 - Maximo customizations: Java class extensions and automation scripting
 - Integrations: web service, interface table, and flat file
 - New Maximo implementations, upgrades, and assessments
 - Large scale data migrations from legacy systems into Maximo
 - Training: public and private on-site
 - Maximo functionality on versions 5, 6 , 7.1, 7.5, & 7.6
 - Maximo for Oil & Gas and Transportation deployments

Questions on Maximo? Contact Fernando directly at:

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Agenda

- Start center overview
- Associating saved queries to result sets
- Modifying result sets
- Creating KPIs
- Creating KPI templates



Start Center Overview

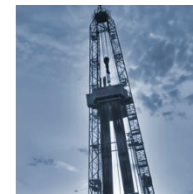
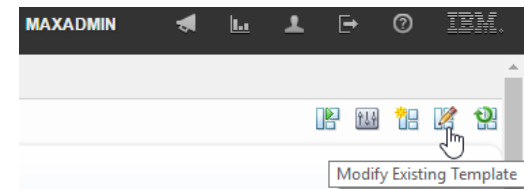
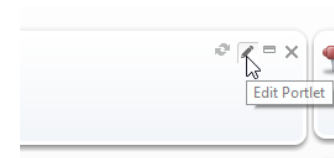
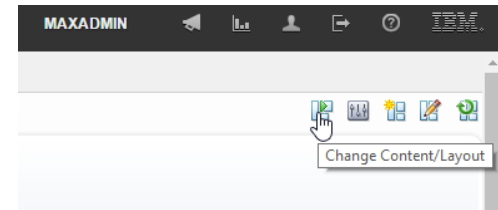
- Favorite Applications
- Quick Inserts
- Bulletin Board
- Inbox / Assignments
- Result Sets
- KPIs
- KPI Lists
- Report Lists




Modifying Start Centers

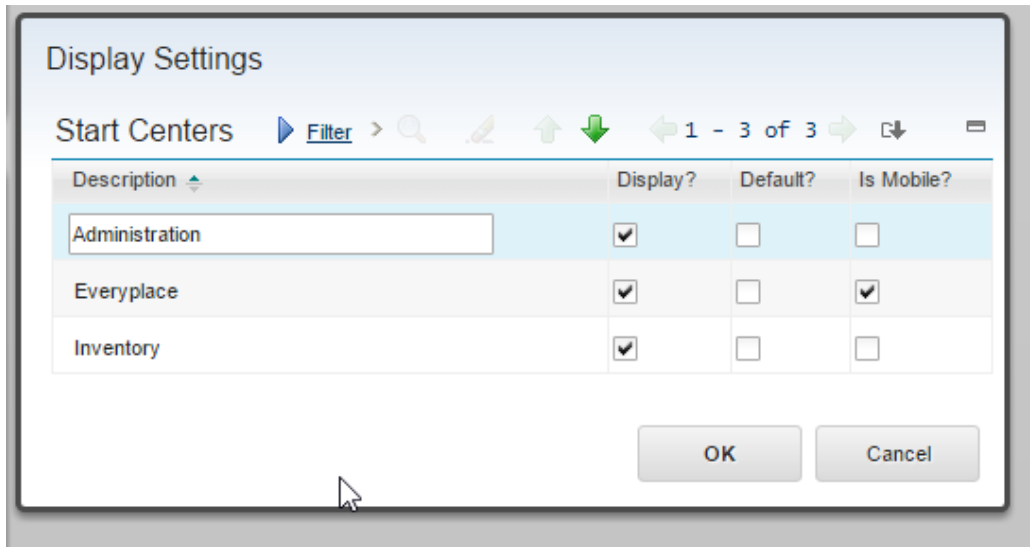
- Modifying personal start centers
 - done by the logged in users, changes only affect them

- Modifying start center templates
 - Usually done by administrators
 - Requires a start center update by end users to take affect
 - Note: this overwrites any changes that a user may have made to their own start center



Start Center Display Settings

- Set which start center displays by default if many templates are available
- Identify start center templates as mobile templates



Start Center Security

- Access to editing Start Center portlets is determined by Security Group options on the following applications:
 - Start Center
 - Favorite Applications Setup
 - Inbox/Assignments Setup
 - KPI Graph Setup
 - KPI List Setup
 - Result Set Setup
 - Quick Insert Setup
- Users can have access to multiple start centers if they are members of multiple security groups, each granting a different start center

Applications Filter > 1 - 1 of 1

Grant Listed Applications ▼ Revoke Listed Applications ▼

Description	Main Object/Table	Original Application (if copied)
start		
Start Center	Start Center Configuration	

Options for Start Center Filter > 1 - 1 of 1

Grant Listed Options for This Application

Description	Grant Access?	Condition
Read/Modify access to Start Center	<input type="checkbox"/>	

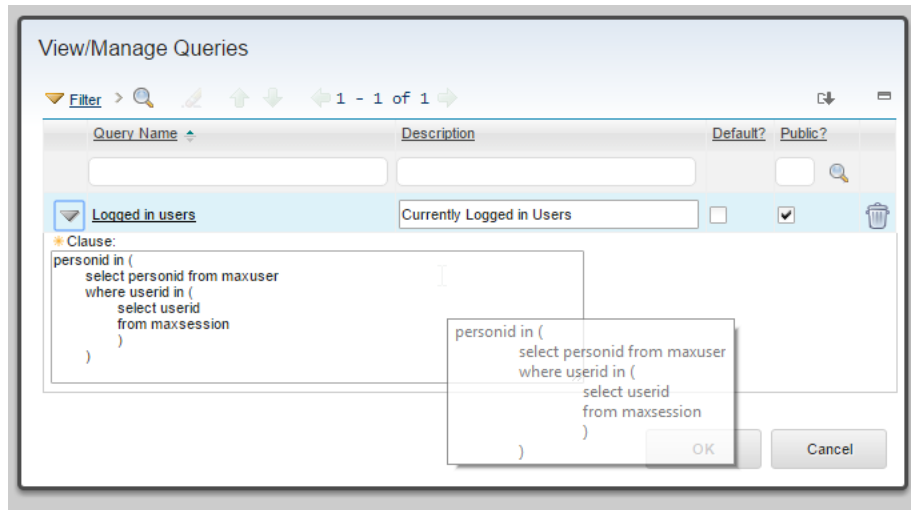
Filter > 1 - 7 of 7

Description	Grant Access?	Condition
Can Log In During Admin Mode	<input type="checkbox"/>	
Can Update Start Center	<input type="checkbox"/>	
Default Information	<input type="checkbox"/>	
Delete Report Button	<input type="checkbox"/>	
Password Information	<input type="checkbox"/>	
Personal Information	<input type="checkbox"/>	
Show Options For Readonly Portlet	<input type="checkbox"/>	



Associating Queries to Start Centers

- Queries are used for displaying important often accessed information
- Queries are associated to Result Set Portlets
- Procedure:
 1. Create query in target application
 2. Associate query to start center template



Modifying Result Sets Portlets

- Key features
 - Displaying data for related records in Object List
 - Related records are defined using Object Structures application (need to use object structures consumed by REPORTING and objects within the
 - Color coding results
 - Charting options

Portlet Type: Result Set

Display Name: Result Set

Application: **USER**

Query: High usage users

Object Structure: User Details

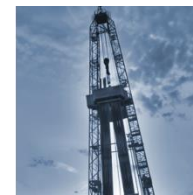
Field Configuration | Chart Options | Color Options

To choose the fields that appear in the portlet, first select an application in the Application field, then select an object from the Object List.

Object List

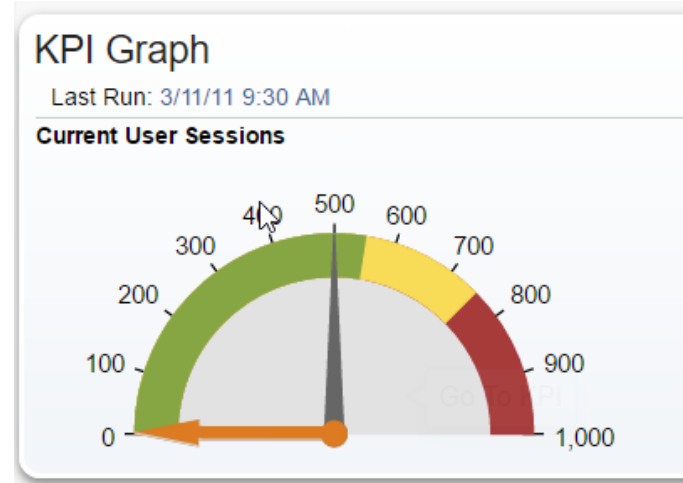
- User Details
 - Personal (Must Be Fields)

Description	Name
<input type="checkbox"/> Database User	DATABASEUSERID
<input type="checkbox"/> Default Repair Facility	DEFAULTREPFAC
<input type="checkbox"/> Repair Facility Site	DEFAULTREPFACSITEID
<input type="checkbox"/> Default Insert Site	DEFSITE
<input type="checkbox"/> Default Storeroom for Self-Service Requisitions	DEFSTOREROOM
<input type="checkbox"/> Failed Logins	FAILEDLOGINS



Creating KPIs

- Key Performance Indicators (KPIs) are used to display a calculated metric that allows a user viewing the metric to make a decision
- KPIs are defined using the KPI Administration application
- Types: DECIMAL and PERCENTAGE
- Can associate related KPIs and Reports to a KPI



Creating KPI templates

- Ability to create a single KPI template that generates multiple KPIs based on variable attributes
- Procedure:
 - Create a template with a Query where clause
 - Ensure that at least 1 variable is defined in the where clause
 - Create KPI, apply targets and variable values per KPI
 - Generate KPIs

Template:
1008

* Application:
USER

* Format:
Decimal

* KPI Query:
Select count (*) from maxuser where status = 'ACTIVE' and type = \${type}

Select count (*) from maxuser where status = 'ACT

KPI Variables [Filter](#)

Variable Name	Object	Attribute
type	MAXUSER	TYPE

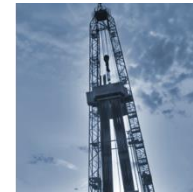
KPI [Filter](#)

KPI	Target	Caution At	Alert At	Public?	Active?
32	50.00	60.00	65.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
33	20.00	25.00	30.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Test Variables New Row

Variable Values for KPI 32 [Filter](#)

Variable Name	Value
type	TYPE 1



Questions?



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Thank you!

