

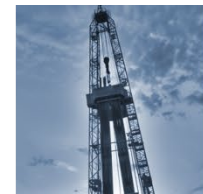


## Easily Rename Records in Maximo MaxEdit

# About the Presenter

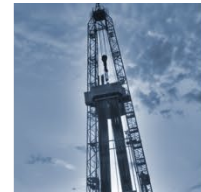
## Frank Vanderham, Principal Consultant

- 15 years of Maximo Implementation Experience
- Experience with:
  - Maximo for Oil & Gas
  - Maximo HSE
  - Maximo Utilities
  - Maximo Transportation
  - Maximo Spatial
- Manages the product development of various software addons that we market and sell to the Maximo community.
- Passionate about finding ways to make Maximo more usable and valuable in your business.



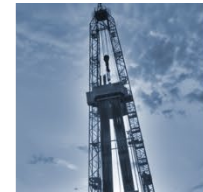
# Agenda

- Common Causes / requirements for renaming records
- Benefits of keeping your Maximo records up-to-date
- Maximo's complexity with regards to naming of records
- Introduction to MaxEdit Rename Tool
- Live Demonstration



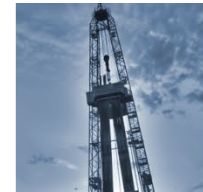
## Introduction – Your Maximo Records are named...

- During the initial Maximo implementation
- To represent things like your Location hierarchy
- Item naming – inventory standards, warehouse, spare part naming
- Company records – tied to financial systems
- Asset naming conventions



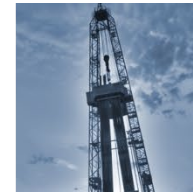
## Common Causes - Requirements for renaming records

- Data entry mistakes
- Acquisitions / Divestments
- Business re-alignment
- Adoption of naming standard, changing standard
- Upgrades / Migration of Maximo
- Merging multiple Maximo systems into one
- Adding integration to an older, existing Maximo system



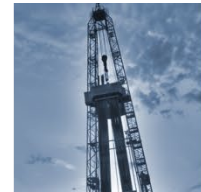
## Benefits of keeping your Maximo records up-to-date

- Standardization of business processes
- Proper naming avoids confusion and data entry error
- Track financial / cost information at the proper level
- Standardize naming with 3<sup>rd</sup> parties, such as vendors, contractors, compliance officers, etc.



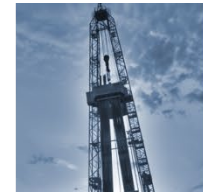
## The Problem: how to rename?

- Unfortunately, Maximo doesn't rename records
- Maximo is not a fully *normalized* database
- Maximo has many tables that reference key fields such as Locations, Items, etc.



## Maximo's complexity with regards to naming of records

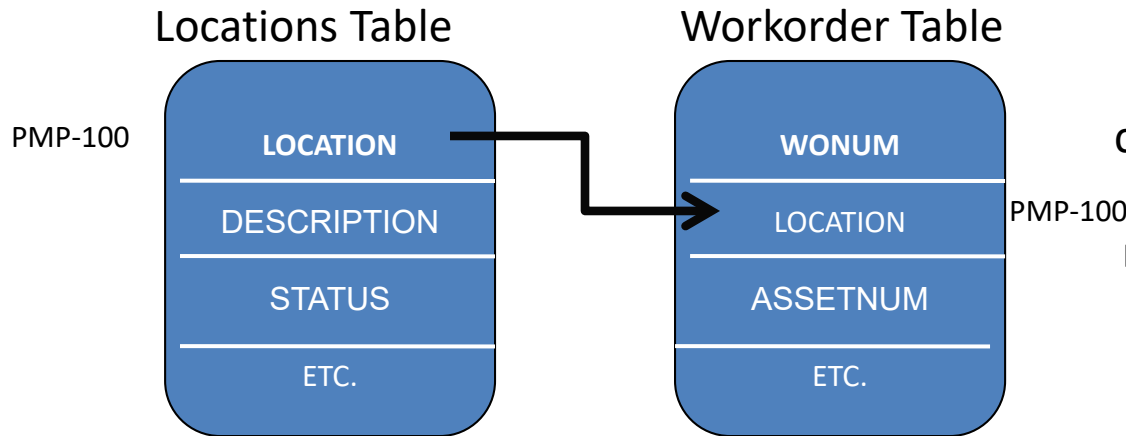
- Maximo database vs. a *normalized* database
- Maximo Relationships vs. *foreign keys* at the database level





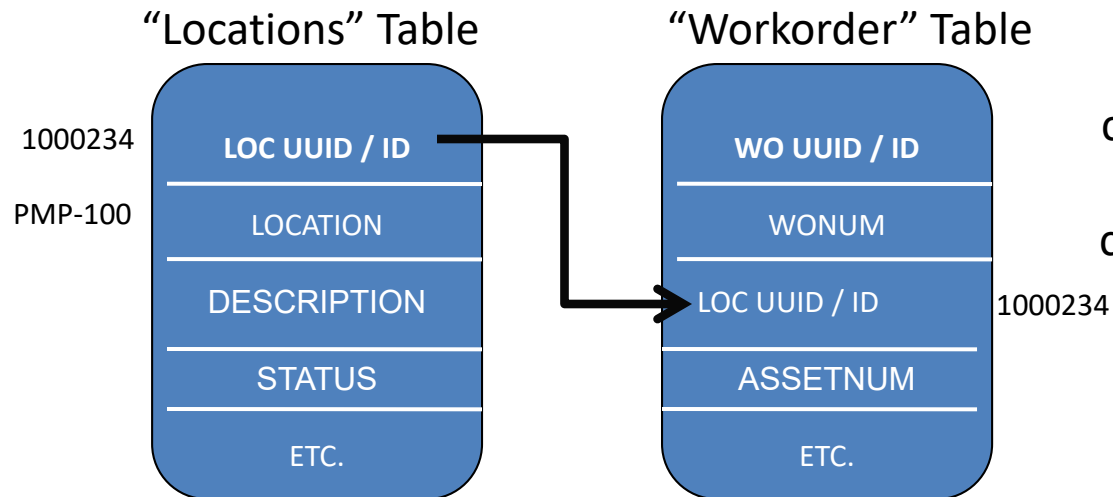
# Maximo database vs. a normalized database

Maximo



Location identifier is copied into the Workorder table, renaming one means updating the other

Normalized, fictitious Maximo



Location identifier is NOT copied into the Workorder table; LOCATION field could be renamed without changing the WO

# Maximo Relationships vs. Foreign Keys

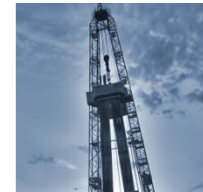
- In database design, a **Foreign Key** manages references of e.g. Locations in Workorders at the **database** level
  - Benefit: referential integrity is managed by the database
  - Downside: dependant on database type, version, etc.
- In Maximo, this is managed via **Relationships** at the **application** level and “Same-As” meta-data tables
  - Benefit: No dependency on database tier
  - Downside: Referential integrity must be handled by the application
- Unlike DB Foreign Keys’ “*on update cascade*”, Maximo does not “cascade” renames



# Okay, Maximo doesn't "do" renames, now what?

## Options:

1. Don't rename, learn to live with the old record
2. Build a SQL update script to update records
3. Hire a consulting outfit to do #2
4. Use Ontracks MaxEdit software tool

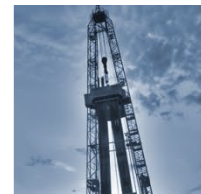


# Introducing Ontracks MaxEdit

- MaxEdit is built into Maximo itself and launched from the Select Action menu
- MaxEdit renames Locations, Items, Assets, Job Plans, Companies (Vendors) and others
- MaxEdit uses Maximo's meta-data "Same-As" information to adjust all records
- MaxEdit adapts to your specific installation and will rename custom objects, fields, etc.\*

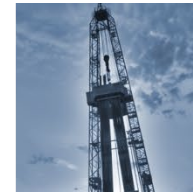
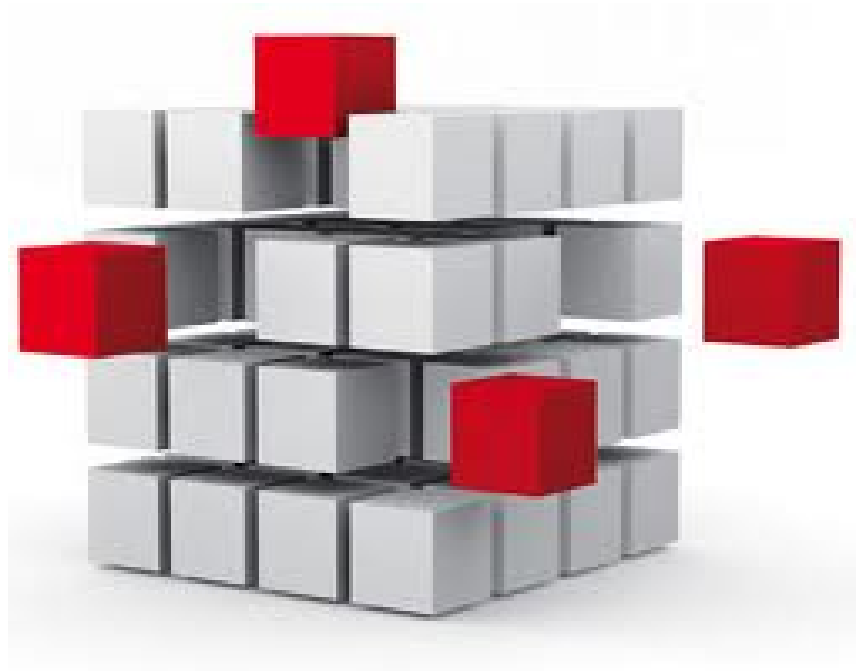


\*) As long as standard practices and the proper configuration steps were applied



# Ontracks MaxEdit Features

- Launched natively inside Maximo
- Standard Maximo security controls who has access
- Renames Locations, Items, Assets, Job Plans, Companies (Vendors) and others
- Provides “dry run”, showing what would happen if you renamed a record
- Identifies all records affected for a rename operation
- Upgrade-aware, since it’s built into Maximo’s framework
- Large install base, both on-premise and cloud-hosted (SaaS)



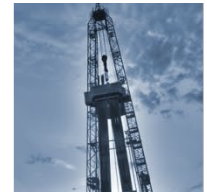
# Ontracks MaxEdit Pros and Cons

## Pros:

- Provides “super users” or business owners the ability to rename records – no requirement for the IT department anymore
- No need to hire consultants or other 3<sup>rd</sup> parties to rename
- Changes are made consistently – less error prone

## Cons:

- Software add-on purchase
- Renames are made one-at-a-time\*



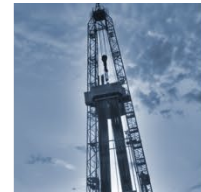
## What to do if you have a massive project on your hands?

- Use MaxEdit Offline!
- Ontracks' MaxEdit grew out of an offline bulk-rename utility that has been used on many projects
- Used extensively in Maximo upgrade projects
- Used to merge multiple Maximo systems into one
- Is **not** distributed with MaxEdit itself, but is available as part of a services engagement for proper training and initial assistance
- MaxEdit Offline is a command-line driven tool, configured using XML files



## Ontracks MaxEdit

- Available as a 30-day trial – use on Development system





# Demonstration





## More Information:

Available at: [www.ontracks.com/products/maximo-rename-tool](http://www.ontracks.com/products/maximo-rename-tool)

## Questions?

Are you looking for more information or have follow-up questions?

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Thank you!

