



Start Center Design Basics Roles & Performance



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Agenda

- Start Centers and the effect of 'Skins'
- Sample Start Centers
- Design Basics & Performance
- What is needed per role – what questions do you ask?
- Key features in portlets
- Query Segments & Samples – for use in Result Sets
- Additional Reference Links including the previous SC Video
- Demonstration

Mobile Start Center

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Cost by System

Electronic Audit Transactions

Electronic Signature Transactions

Estimated vs Actual Work Order Costs

Inventory ABC Analysis

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Mobile Start Center

Open Purchase Requisitions (Sites in different colors)

PR	Description	Requested By	Required Date	Status	Status Date	Total Cost	Vendor	Site
1059	Generated by reorder 5/4/20 3:24 PM.	MAXADMIN		WAPPR	5/4/20 3:24 PM	5,239.50	DELL	DENVER
1058	Generated by reorder 5/4/20 3:24 PM.	MAXADMIN		WAPPR	5/4/20 3:24 PM	0.00		DENVER
1047	Pump Seal & Shaft	MAXADMIN		WAPPR	3/23/20 11:40 PM	1,505.98	HELVIG	BEDFORD
1046	Pump Seal & Shaft	MAXADMIN		WAPPR	3/23/20 11:40 PM	1,505.98	HELVIG	BEDFORD
1045	Pump Seal & Shaft	MAXADMIN		WAPPR	3/23/20 11:40 PM	1,505.98	HELVIG	BEDFORD
1044	Pump Seal & Shaft	MAXADMIN		WAPPR	3/23/20 11:38 PM	1,505.98	HELVIG	BEDFORD
1043	Pump Seal & Shaft	MAXADMIN		WAPPR	3/23/20 11:35 PM	1,505.98	HELVIG	BEDFORD
1042	Pump Seal & Shaft	MAXADMIN		WAPPR	3/23/20 11:35 PM	1,505.98	HELVIG	BEDFORD
1041	Pump Seal & Shaft	MAXADMIN		WAPPR	3/23/20 11:35 PM	1,505.98	HELVIG	BEDFORD
1040	Pump Seal & Shaft	MAXADMIN		WAPPR	3/23/20 11:30 PM	1,505.98	HELVIG	BEDFORD

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Open POs - all sites - Cost: 8K in RED

PO	Rev#	Description	Required Date	Ordered Date	Status	Status Date	Vendor	Vendor Name	Total Cost	Site
1005	0	Electrical Supplies	1/10/97 12:00 AM		WAPPR	12/31/99 9:00 AM	GCE	Garden City Electrical Supply Co	498.75	BEDFORD
1012	0	General Contractors for Misc. Maint. Activities		1/12/97 9:15 AM	APPR	1/12/97 9:22 AM	CHESTER	A. W. Chesterton Company	8,420.00	BEDFORD
1013	0	Window and installation for office building		4/20/00 2:00 PM	WAPPR	4/20/00 2:00 PM	JK	Julius Kraft Co.	499.20	BEDFORD
1015	0	Request for Tubing		4/23/97 10:23 AM	WAPPR	6/11/04 3:55 PM			41.00	BEDFORD
1017	0	Seals for Central Storeroom		4/25/00 1:33 PM	APPR	4/25/00 1:33 PM	ATI	Atlanta Trading, Inc.	283.50	BEDFORD
1021	0		12/14/01 10:32 AM	12/12/01 12:00 AM	APPR	12/12/01 12:00 AM	KENNEDY	Txn Server Marketplc	0.00	BEDFORD
1022	0		12/13/01 10:32 AM	12/12/01 12:00 AM	APPR	12/12/01 12:00 AM	KENNEDY	Txn Server Marketplc	6.19	BEDFORD
1023	0			12/12/01 12:00 AM	APPR	12/12/01 12:00 AM	KENNEDY	Txn Server Marketplc	0.00	BEDFORD
1024	0		12/14/01 10:32 AM	12/12/01 12:00 AM	APPR	12/12/01 12:00 AM	OFFRUS	Office R Us	5.00	BEDFORD
1026	0			12/12/01 12:00 AM	APPR	12/12/01 12:00 AM	OFFRUS	Office R Us	2.50	BEDFORD

Chart View

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Open Work Orders - Bedford - Priority > 6 in RED

Work Order	Description	Location	Asset	Reported Date	Reported By	Status	Status Date	Supervisor	Lead	Target Finish	Work Type	Priority	Site
1000	Relocate Guard Rails Around Compressor	BR300	11300	12/31/98 12:18 PM	Joe Jones	WAPPR	2/6/99 2:25 PM	ED	WILSON	12/31/98 3:00 PM	CM	2	BEDFORD
1001	12 Month Service on Shipping Dept #1 Conveyor	SHIPPING	12800	12/31/98 10:57 AM	Tom Diller	INPRG	1/1/99 9:48 AM	CSWILSON	WILSON	12/31/98 12:00 PM	CM	5	BEDFORD
1002	Rebuild Feedwater Pump	BR450	11450	12/31/98 11:08 AM	SMITH	APPR	2/27/03 10:48 AM	MILLER		1/5/99 12:00 AM	CM	3	BEDFORD
1003	Check for Plumbing Problem	BOILER		12/31/98 12:12 PM	Tom Diller	APPR	12/31/98 9:44 AM	ED		12/31/98 1:00 PM	CM	5	BEDFORD
1004	Generator Overhaul	BR230	11230	12/31/98 10:50 AM	Dave Smith	INPRG	2/6/99 2:16 PM	MILLER	HUNTER	12/31/98 3:00 PM	CM	1	BEDFORD
1005	Electric Can Tune-Up	SHIPPING	12300	12/31/98 3:17 AM	Joe Jones	APPR	12/31/98 3:44 AM	ED	WILSON	12/31/98 9:00 AM	CM	7	BEDFORD
1006	Feedwater Pump Service	BR450	11450	12/31/98 9:22 AM	Dave Smith	APPR	3/31/99 7:54 AM	ED		1/3/99 4:00 PM	CM	7	BEDFORD
1007	Packaging Mach. Elevator & Drainpan Inspection	BPM3100	13141	12/31/98 9:32 AM	Tom Diller	APPR	12/31/98 1:47 PM	ED		1/1/99 11:00 AM	CM	8	BEDFORD
1008	Repair Damaged Conduit Feeding Generator	BR230	11230	12/31/98 9:33 AM	Dave Smith	WAPPR	12/31/98 9:33 AM	ED		1/1/99 7:00 AM	CM	7	BEDFORD
1009	12 Month Service on Shipping Dept #2 Conveyor	SHIPPING	12700		Tom Diller	INPRG	7/7/03 9:50 AM			12/29/08 9:51 PM	PM	8	BEDFORD

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Issued in last 90 days all sites (sites in different colors)

Year to Date	Item	Item Description	Storeroom	Default Bin	Issue Unit	Last Issue Date	Last Year	ABC Type	Count Frequency	Primary Vendor	Stock Category	Reorder Point	Site
2.00	117084	Shaft- 1 Inch Dia	CENTRAL	C-5-2	FEET	5/3/20 3:00 PM	0.00	C	90	ATI	STK	2.00	BEDFORD
1.00	XMP-9500	Gasket- AR48	CENTRAL	D-5-5	EACH	5/3/20 3:00 PM	0.00	B	60	ATI	STK	10.00	BEDFORD
1.00	12853	Impeller- 4-1/2 Inch Dia	CENTRAL	B-5-2	EACH	5/3/20 3:00 PM	0.00	B	60	ATI	STK	2.00	BEDFORD
3.00	20778	Housing- Centrifugal Pump	CENTRAL	B-5-8	EACH	5/3/20 3:00 PM	0.00	C	90	ATI	STK	1.00	BEDFORD
8.00	11453	Seal, Mechanical, Self-Aligning- 1 In ID	CENTRAL	A-4-9	EACH	5/3/20 3:00 PM	0.00	B	60	ATI	STK	2.00	BEDFORD
2.00	11453	Seal, Mechanical, Self-Aligning- 1 In ID	CENTRAL	A-4-9	EACH	4/24/20 3:21 PM	0.00		0		STK	0.00	DENVER
1.00	BANDSAW	MILWAUKEE 3in BAND SAW	CENTRAL	A102R	EACH	5/5/20 10:00 AM	0.00		0		STK	0.00	BEDFORD

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Administration

Buyer

C Winston's Start Center

Inventory

Maximo Administration

Purchasing Administration Lead Super User

Technician

Technician Everyplace

Change Content/Layout

Display Settings

Create New Template

Modify Existing Template

Update Start Center

Users - Blocked Users in RED

Filter

User Name	Name	DefSite	DspFiltr?	Status	Type	Failed Logins
tony	Max tony		Y	BLOCKED	TYPE 1	4
maxadmin	MAXADMIN	BEDFORD	Y	ACTIVE	TYPE 1	0

Set Chart Options

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Domains

Object Structures

Communication Templates

Roles

Cron Task Setup

Database Configuration

Application Designer

Administrative Apps

People

Users

Labor

Security Groups

Person Groups

Organizations

End User Apps-Consider making more, smaller portlets and minimize

Big Brother

Last Run: 6/9/20 12:00 AM

Update

Status	KPI	Actual	Target	Variance
↓	% Ad Hoc Reports (%)	0	40	-40
↑	Count of End User Logins in Last 24 Hours	2	10	-8
→	Registered User - Type 10	8	100	-92

Mobile Start Center

Active (or Blocked) Users

Filter

User Name	Name	Default Insert Site	Use Default Insert Site as a Display Filter	Default Storeroom for Self-Service Requisitions	Person	Status	Type	Failed Logins
tony	Max tony		Y		TONY	BLOCKED	TYPE 1	4
cwinston	Chris Winston	BEDFORD	Y	CENTRAL	CWINSTON	ACTIVE	TYPE 9	0
maxsr	service requestor work center	BEDFORD	Y	CENTRAL	MAXSR	ACTIVE	TYPE 7	0
wsymons	Will Symons	BEDFORD	Y	CENTRAL	WSYMONS	ACTIVE	TYPE 10	0
tmarcus	Telicia Marcus	BEDFORD	Y	CENTRAL	TMARCLUS	ACTIVE	TYPE 10	0
mberry	Michael Berry	BEDFORD	Y	CENTRAL	MBERRY	ACTIVE	TYPE 10	0
kwebb	Kia Webb	BEDFORD	Y	CENTRAL	KWEBB	ACTIVE	TYPE 10	0
kross	Kyle Ross	BEDFORD	Y	CENTRAL	KROSS	ACTIVE	TYPE 10	0
igeverdt	Ian Geverdt	BEDFORD	Y	CENTRAL	IGEVERDT	ACTIVE	TYPE 10	0
cwaters	Clyde Waters	BEDFORD	Y	CENTRAL	CWATERS	ACTIVE	TYPE 10	0
ahenle	Allan Henle	BEDFORD	Y	CENTRAL	AHENLE	ACTIVE	TYPE 10	0
winston	Todd Winston	BEDFORD	Y		WINSTON	ACTIVE	TYPE 1	0
wilson	Mike Wilson	BEDFORD	Y		WILSON	ACTIVE	TYPE 1	0
watters	Ray Watters	BEDFORD	Y		WATTERS	ACTIVE	TYPE 1	0
vinl	Vini Affonso	BEDFORD	Y		VINI	ACTIVE	TYPE 1	0
vance	Vance Smith	BEDFORD	Y		VANCE	ACTIVE	TYPE 1	0
tom	Tom Rontiris	BEDFORD	Y		TOM	ACTIVE	TYPE 1	0
theo	Theodore Seville	BEDFORD	Y		THEO	ACTIVE	TYPE 1	0
storm	Katherine Storm	BEDFORD	Y		STORM	ACTIVE	TYPE 1	0
steveb	Steve Barnes	BEDFORD	Y		STEEB	ACTIVE	TYPE 1	0
stanley	Fred Stanley	BEDFORD	Y	ATLANTA	STANLEY	ACTIVE	TYPE 1	0
snolan	Samuel Nolan	BEDFORD	Y		SNOLAN	ACTIVE	TYPE 1	0
smiths	Julie Smithers	BEDFORD	Y		SMITHERS	ACTIVE	TYPE 1	0
smith	Roland Smith	BEDFORD	Y		SMITH	ACTIVE	TYPE 1	0
sinclair	Bill Sinclair	BEDFORD	Y		SINCLAIR	ACTIVE	TYPE 1	0

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Report List

Report Schedule Limits and Maintenance

Report Usage

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Design Basics & Performance

- Role Based Start Centers

- Role based start centers can be smaller and more easily fit without scrolling improving navigation AND performance
- Each start center is represented by a tab that can be hidden if desired, and one can be set as default
- Some or perhaps all users will have more than one start center tab based on this design concept

Needs – Questions to ask

- What do you need to see most at login / logout?
 - Likely to drive KPI's, and Results Sets
- What do you need to see most during the day?
 - Tends to drive Favorites, Quick Inserts, Report Lists
- What about Workflow and Bulletin Board
 - If you are using workflow, then yes.
 - Bulletin Board may take valuable real estate – consider referring user to Menu Bar message indicator

Role 1 - Managers

- Likely needs Workflow or another approval method, KPI's and a few key reports
- Should fit onto 1 screen with no scrolling

Left Side

- Quick Insert (SR's only)
- Favorites (1-2)
- KPI Graph
- Report List (3-4)

Right (Wide) Side

- Workflow Inbox
- Results Set(s) - ≤ 1
- KPI List

Role 2 – Supervisors / Leads

- Favorites grouped into 2-3 portlets
- Result Sets to focus on their work as an individual as well as those they supervise / lead

Left Side

- Quick Insert (1-2)
- Favorites 1 (0-3)
- Favorites 2 (0-3)
- Report List (1-2)

Right (Wide) Side

- Workflow Inbox
- Results Set(s) - ≤ 2
- KPI List

Role 3 – Maintenance Technicians

- Need access to work assigned to them
- Should fit onto 1 screen with no scrolling

Left Side

- Favorites (4-5)
- Report List (3-4)

Right (Wide) Side

- Results Set(s) – 1 to 2

Key Features in Portlets

- Use more than one of the same portlet for organization – each portlet can be minimized
 - Especially for Favorites
- Bulletin Board – consider not using this portlet; leverage msg count indicator on menu bar
- Quick Insert – can use ticket templates for SR creation to preload certain fields
- Workflow Inbox – consider adding ‘Last Memo’ field if not already present; Owner Description provides application and record key (useful if using >1 workflow)
- Report List – make sure reports have embedded query, runtime parameters or both- ALWAYS
- Key Performance Indicators – make sure the cron task is running at an appropriate time
 - Away from major usage, downtime, and backups
- Result Sets – this is the start center resource hog
 - Make sure Queries are efficient
 - Try not to have too many per start center template

Query Segments & Samples

((woclass = 'WORKORDER' or woclass = 'ACTIVITY') and historyflag = 0 and istask = 0) and...

- Related to the current user's default insert site:
 - ...(siteid in (select defsite from maxuser where userid= :USER))
- Related to the current user being the person assigned as lead (replace 'lead' below with reportedby, supervisor, owner, buyer, etc., as needed)
 - ...lead = (select personid from person where personid = (select personid from maxuser where userid = :USER))
- Related to the current user being the person on a team assigned as owner group (replace ownergroup with persongroup (workgroup on screen) if needed)
 - ownergroup in (select persongroup from persongroup where persongroup in (select persongroup from persongroupteam where respparty in (select personid from person where personid = (select personid from maxuser where userid = :USER))))
- Purchase Orders with open receiving (use in Receiving and PO apps)
 - ((status in ('APPR', 'INPRG') and (upper(receipts) = 'NONE' or upper(receipts) = 'PARTIAL') and historyflag = 0)
- Dealing with dates, i.e. Reported 7 days ago
 - ...(reportdate > getdate()-7)
 - getdate() for SQL Server; SYSDATE for Oracle

Additional Reference Links (case sensitive)

- Start Centers and their Portlets – <https://youtu.be/SfxRpiN3jHU>
- Key Performance Indicators(KPI) – <https://tinyurl.com/MaximoKPI76>
- KPI Templates – <https://youtu.be/8Qz-91h46ig>
- IBM Skills Gateway (online training) – <https://ibm.com/training>
- Ontracks Lunchcast: IBM's Darlene Nerden talks about
 - “Maximo Performance Tuning” <https://lnkd.in/eTrbDJU>
- Understanding Search Methodologies – <https://tinyurl.com/SearchMethodologies>
- Configure Maximo Interface / Skins – <https://tinyurl.com/ConfigureUI>

DEMONSTRATION