

## Start Center Design Basics Roles & Performance



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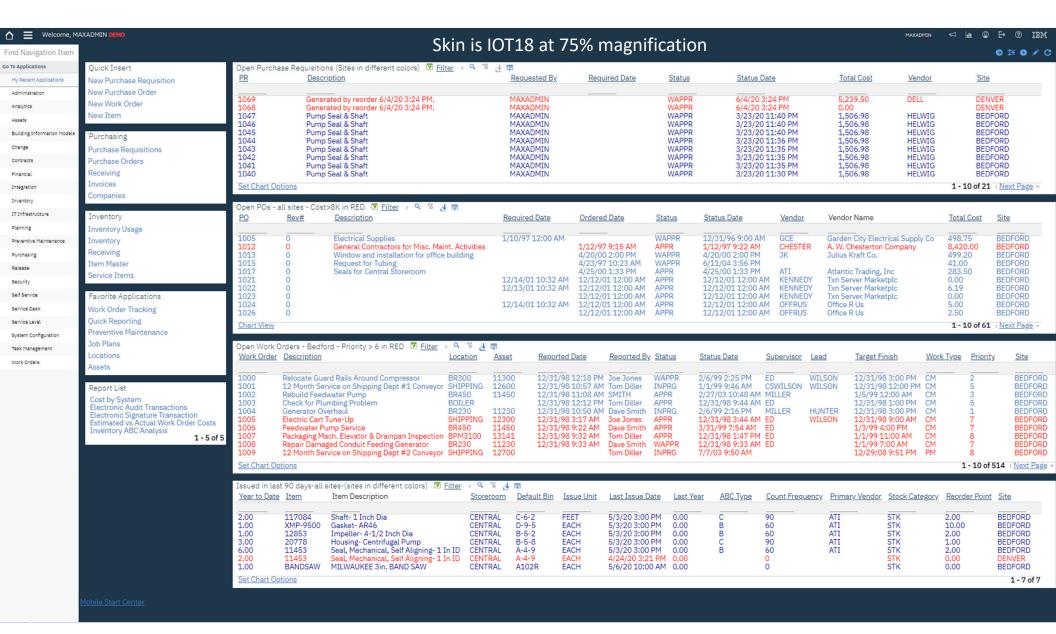


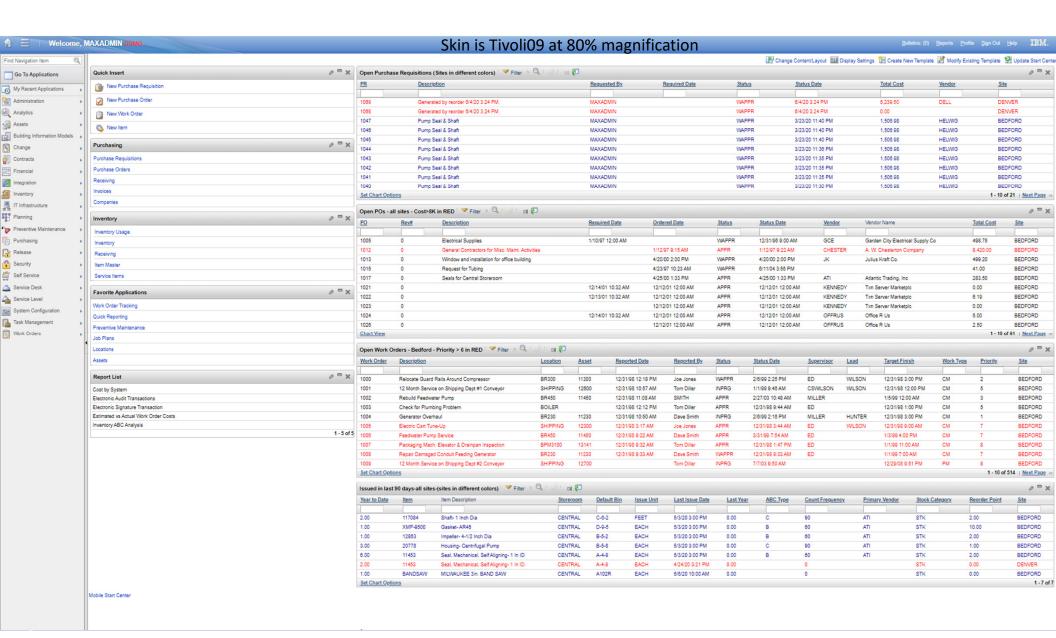
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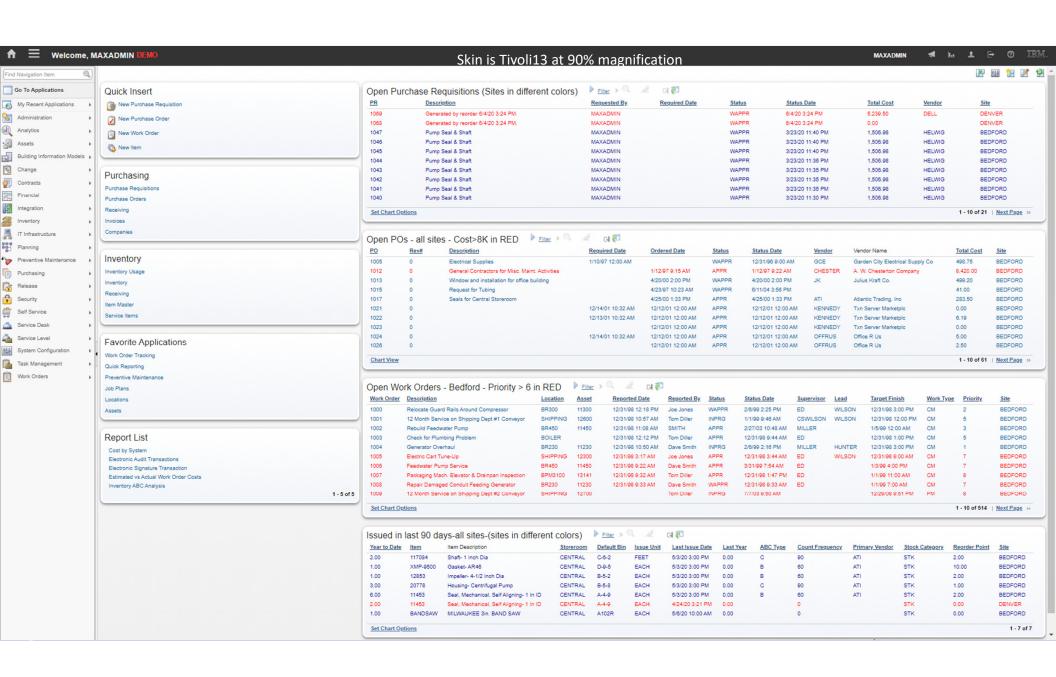
## Agenda

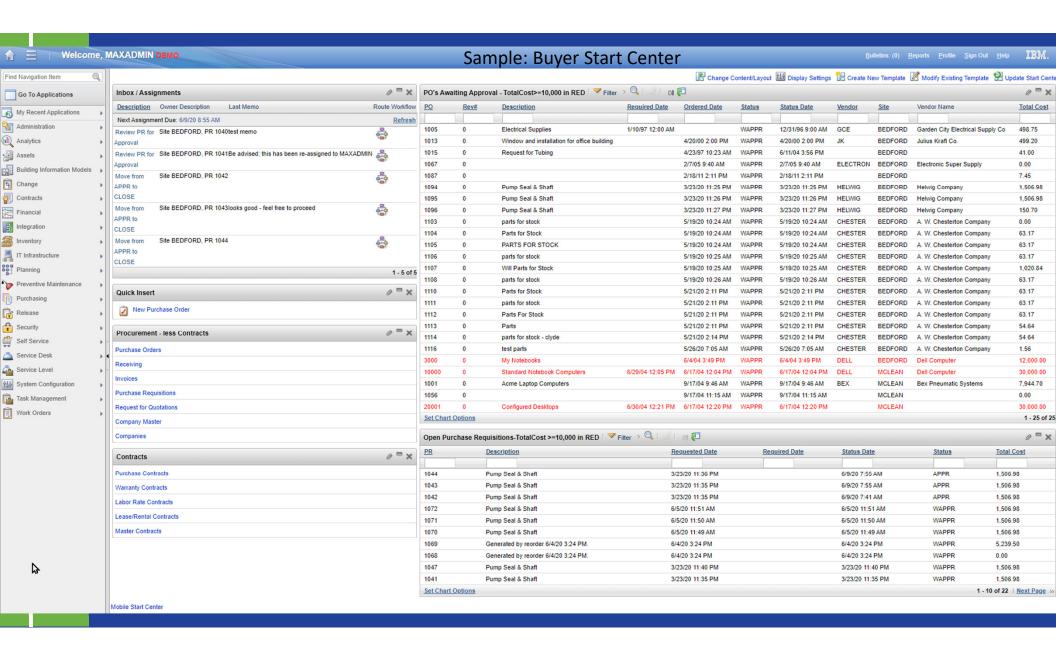
- Start Centers and the effect of 'Skins'
- Sample Start Centers
- Design Basics & Performance
- What is needed per role what questions do you ask?
- Key features in portlets
- Query Segments & Samples for use in Result Sets
- Additional Reference Links including the previous SC Video
- Demonstration

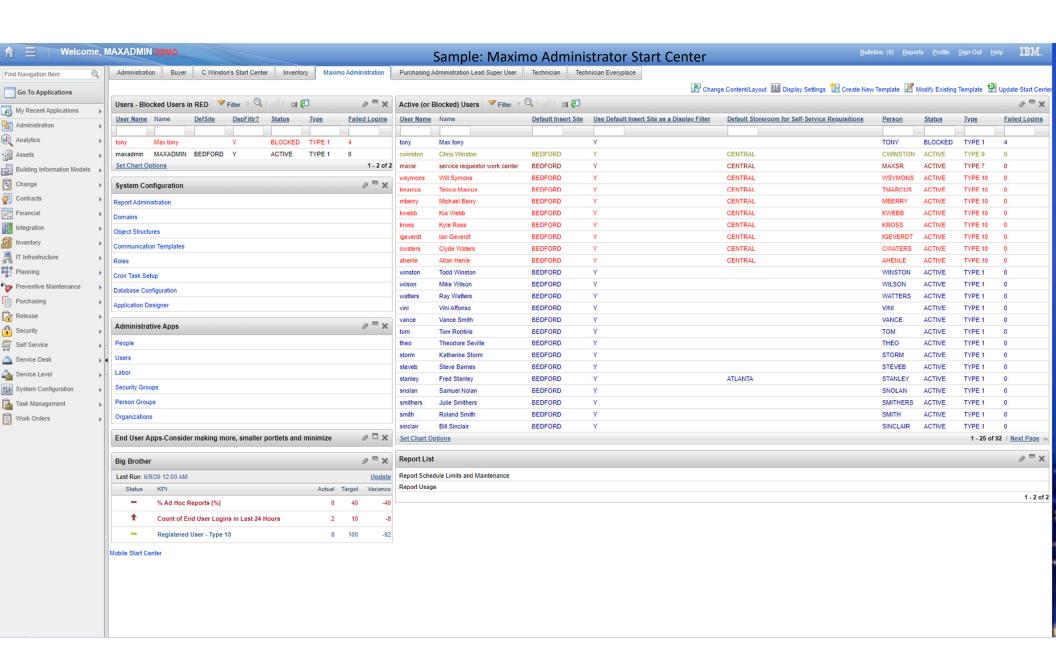












# Design Basics & Performance

- 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</li>
- 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 2(0-3)KPI List
- Report List (1-2)

Right (Wide) Side

- Workflow Inbox
- Favorites 1(0-3)Results Set(s) <=2</li>



## 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 <a href="https://youtu.be/SfxRpjN3jHU">https://youtu.be/SfxRpjN3jHU</a>
- Key Performance Indicators(KPI) <a href="https://tinyurl.com/MaximoKPI76">https://tinyurl.com/MaximoKPI76</a>
- KPI Templates https://youtu.be/8Qz-91h46ig
- IBM Skills Gateway (online training) <a href="https://ibm.com/training">https://ibm.com/training</a>
- Ontracks Lunchcast: IBM's Darlene Nerden talks about
  - "Maximo Performance Tuning" <a href="https://lnkd.in/eTrbDJU">https://lnkd.in/eTrbDJU</a>
- Understanding Search Methodologies https://tinyurl.com/SearchMethodologies
- Configure Maximo Interface / Skins <a href="https://tinyurl.com/ConfigureUl">https://tinyurl.com/ConfigureUl</a>



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