

IT Asset Configuration and Management in MXES

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IT Asset Configuration and Management in MXES

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MXES Curriculum for EAM

Current as of: September 2005

For updates on Training Info, Course Descriptions, and Course Availability, please contact:

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Key



Instructor-Led Training



Virtual Classroom Training

Foundation

<u>Course #</u>	<u>Course Name</u>	<u>Length</u>	<u>Delivery Options</u>	<u>Prerequisites</u>
MED0138	MXES Navigation & Querying	½ day, or 3-hr virtual		None

Upgrade

<u>Course #</u>	<u>Course Name</u>	<u>Length</u>	<u>Delivery Options</u>	<u>Prerequisites</u>
MED0136	MXES for EAM - New Features	3 days		None (<i>Note:</i> for users upgrading from Maximo 5)

Implementation

<u>Course #</u>	<u>Course Name</u>	<u>Length</u>	<u>Delivery Options</u>	<u>Prerequisites</u>
MED0146	MXES Immersion Training for EAM	5 days		MXES Navigation & Querying

End-User / Functional

<u>Course #</u>	<u>Course Name</u>	<u>Length</u>	<u>Delivery Options</u>	<u>Prerequisites</u>
MED0137	System Administration for MXES	3 days		MXES Navigation & Querying
MED0139	Inventory Management Using MXES	3 days		MXES Navigation & Querying
MED0143	Work Management Using MXES	4 days		MXES Navigation & Querying
MED0148	EAM Workflow Management Using MXES	5 days		MXES Immersion Training for EAM (<i>Note:</i> Extensive hands-on Maximo experience preferred)
MED0150	Purchasing with MXES	2 days		MXES Navigation & Querying



MXES Curriculum for ITSM / ITAM

Current as of: September 2005

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Key



Instructor-Led Training



Virtual Classroom Training

Foundation

<u>Course #</u>	<u>Course Name</u>	<u>Length</u>	<u>Delivery Options</u>	<u>Prerequisites</u>
MED0138	MXES Navigation & Querying	½ day, or 3-hr virtual		None

Implementation

<u>Course #</u>	<u>Course Name</u>	<u>Length</u>	<u>Delivery Options</u>	<u>Prerequisites</u>
MED0149	MXES Immersion Training for IT	5 days		MXES Navigation & Querying
MED0145	Implementing ITIL with MXES	1 day		

End-User / Functional

<u>Course #</u>	<u>Course Name</u>	<u>Length</u>	<u>Delivery Options</u>	<u>Prerequisites</u>
MED0141	IT Service Management Using MXES	3 days		MXES Navigation & Querying
MED0142	IT Asset Configuration & Management in MXES	2 days		MXES Navigation & Querying
MED0137	System Administration for MXES	3 days		MXES Navigation & Querying
MED0150	Purchasing with MXES	2 days		MXES Navigation & Querying

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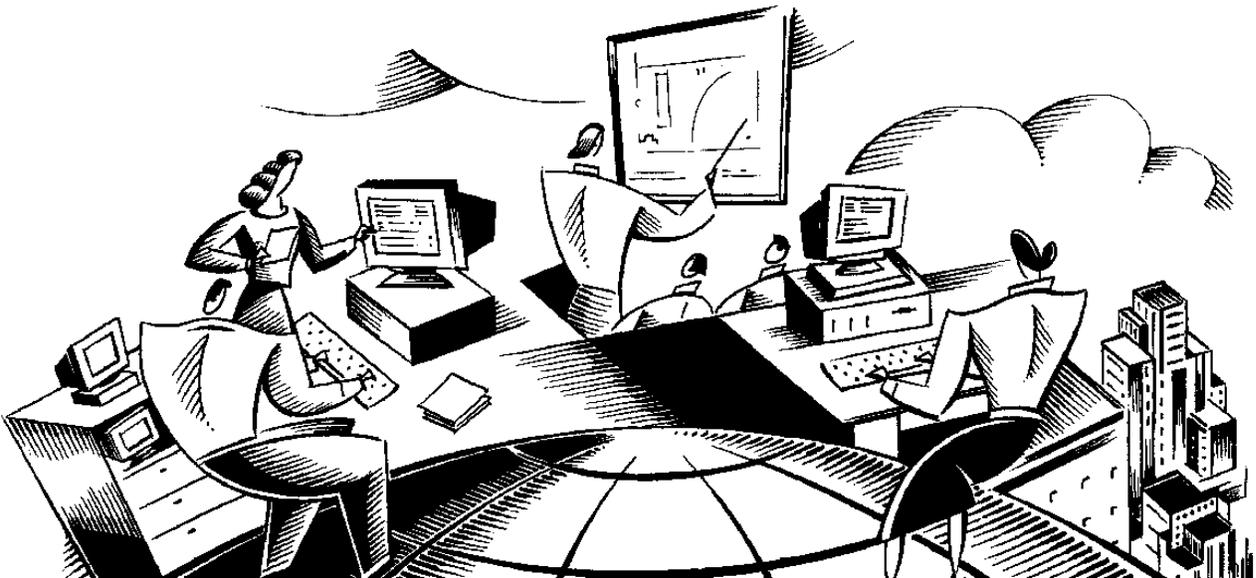
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IT Asset Configuration and Management in MXES

Unit 1: Course Overview



In This Unit

This unit contains the following chapter:

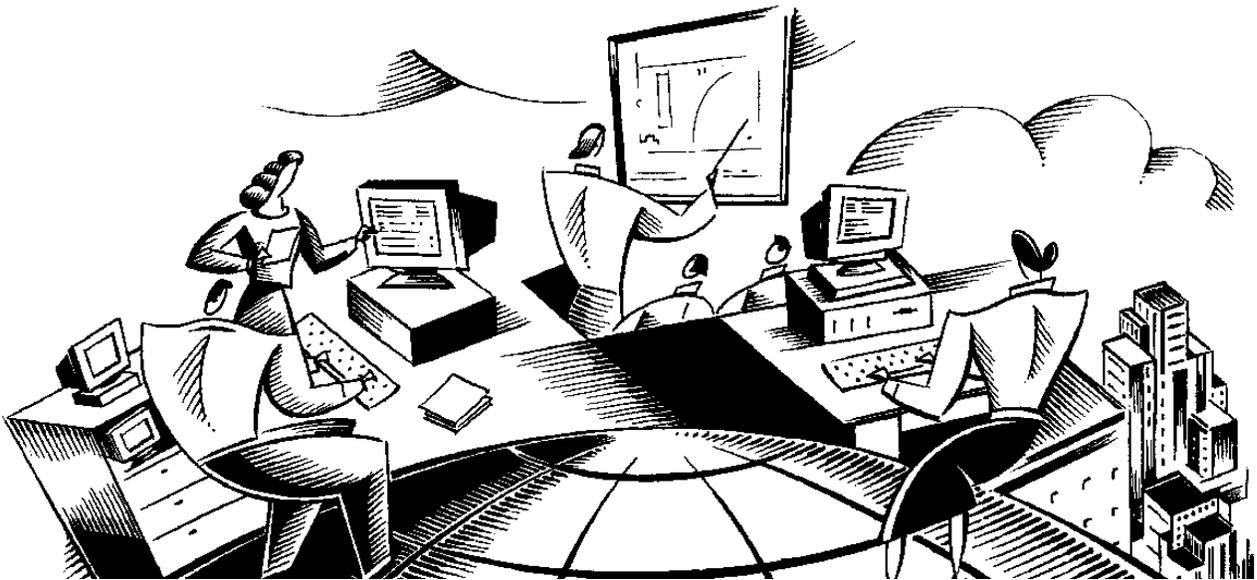
Chapter	Subject
1	Course Introduction

Unit Purpose

The purpose of this unit is to provide you with an overview of the course: its objectives, organization units, chapters, and conventions.

IT Asset Configuration and Management in MXES

Chapter 1: Course Introduction



In This Chapter

This chapter contains the following topics:

Topic	See Page
Course Introduction	1-1
Course Goals and Objectives	1-2
Course Organization	1-4
Typographical Conventions	1-7

Course Introduction

Welcome

Welcome to the *IT Asset Configuration and Management in MXES* course. When you have completed this course, you should be able to use the Maximo Enterprise Suite (MXES) to manage your IT assets.

Audience

This course is intended to teach IT asset managers how to use Maximo to effectively set up and manage IT assets.

Chapter Purpose

The purpose of this chapter is to acquaint you with the features of this course and the student guide and to establish the goals and objectives for the course.

Key Information

While working through some exercises in this course, you will need to make administrative changes to Maximo and then view those changes in Maximo. To access Maximo, you will need the information indicated below.

Maximo URL: _____

Maximo User Name: _____

Maximo Password: _____

Assigned Student Number: _____

Database Instance (if applicable): _____

Your instructor will now provide this information; please write the information in the spaces above.

Course Goals and Objectives

Course Overview	This course introduces users to the Maximo functions that relate to IT asset configuration and management.
Course Prerequisites	<ul style="list-style-type: none">• <i>MXES Navigation & Querying</i> or demonstrable working experience with MAXIMO 5.x or greater• Working knowledge of the Microsoft Windows operating system
Course Goal	The overall goal of this course is to develop competency in using Maximo to effectively set up and manage your IT assets.
Course Learning Objectives	<p>When you have completed this course, you should be able to:</p> <ul style="list-style-type: none">• plan for and set up IT assets;• create IT item masters and records;• apply standard configurations (item assembly structures);• manage vendors;• create, update, and delete purchase, lease, warranty, and software contracts;• set up and use terms and conditions;• create requisitions for assets using the Desktop Requisitions and Purchase Requisitions applications;• create requests for quotations (RFQs);• create RFQs from purchase requests;• create contracts from RFQs;• receive IT assets and deploy them to a user;• manage moves and swaps;• discover IT assets in your organization;• migrate discovered assets into the Maximo database;• decommission an IT asset; and• return an item to a vendor when a lease expires.

continued on next page

Course Goals and Objectives continued

Your Learning Objectives



Now that you understand the basic objectives for the course, it is most important that you define the learning objectives *you* bring to the course. We want to make sure that these are clearly stated, mutually understood, and achieved.

List your objectives in the space below. We will conclude the course by asking you whether you have met your objectives. If you have not, we will then address your questions and unmet objectives.

•

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Course Organization

Organization	This course has been organized into teaching modules made up of chapters. Each chapter focuses on a specific aspect of the IT asset lifecycle.
Chapters	<p>Each chapter in this book is an individual teaching module designed to provide an overview of its topic(s) and then provide in-depth instruction and practice.</p> <p>Each chapter contains these components:</p> <ul style="list-style-type: none">• A subject-matter overview and objectives. <i>This component provides orientation and perspective for the chapter, along with learning objectives.</i>• Instruction in concepts and procedures. <i>In this part of the chapter, the instructor and the text review relevant concepts, components, and procedures.</i>• Hands-on practice. <i>You will practice most of the important procedures and concepts that the instructor introduces. You will have opportunities for brief hands-on practice during the body of the module and, in some cases, longer hands-on practice in a workshop at the end of the unit.</i>
Notes Pages	Notes pages are provided at the end of each chapter. You can use these pages to capture information specific to your situation, or important points covered in class discussions.

continued on next page

Course Organization continued

Special Note:
Shared vs.
Independent
Databases



- Throughout this course there could be up to 20 participants accessing the same database. If you are *sharing* a single database, your instructor will assign you a two-digit student number (for example, 01–20) to avoid confusion and/or conflicting records in the database.

Some exercises throughout this course will have an *xx* appended to data entry items. Whenever an *xx* is appended, substitute your assigned student number for the *xx*.

- If you are taking this course in an *independent*-database environment—that is, your database is independent from other students' databases and the instructor's database—student numbers are unnecessary. You can simply do the exercises using the records indicated, without adding a student number.

If you are not sure whether you are sharing a database, check with your instructor.

continued on next page

Course Organization continued

Unit/Chapter Organization

This table contains a list of units and chapters in the course manual.

Unit	Chapter	Name	Description
1 Course Overview	1	Course Introduction	Course goals, objectives, organization, conventions, and agenda
2 Planning	2	Identifying Needed Assets	Defining and creating item sets, item masters, item records, and item assembly structures
	3	Identifying Vendors	Creating a company master and entering company records
	4	Contracts	Creating purchase, lease, software, and warranty contracts; setting up and using service level agreements; and setting up terms and conditions
3 Acquisition	5	Requisitions	Creating requisitions and using the Desktop Requisitions and Purchase Requisitions applications
	6	Request for Quotations	Creating requests for quotations, creating an RFQ from a PR, creating a PO from an RFQ, and creating a contract from an RFQ
4 Deployment	7	Receiving	Receiving IT assets and applying an item assembly structure to received items
	8	Moves and Swaps	Performing moves and mass moves and swapping assets
5 Maintaining Assets	9	Deployed Assets	Using the Discovery and Fusion applications and the Deployed Assets module to monitor actual hardware and software usage
6 Disposal	10	Returns and Decommissions	Returning items to a vendor and decommissioning assets
Appendix		IT Service Management Processes with Maximo	Fundamental IT Service Management concepts and terminology

Typographical Conventions

Introduction

We use a number of typographical conventions and icons in our course materials.

Conventions Used in Course Materials

Here are some of the conventions you will see most frequently in the course materials:

Convention	Usage	Example
<i>Italics</i>	Introduces or emphasizes a term	A <i>system</i> is a single instance of a Maximo database.
Boldface	Indicates that the word or phrase names a menu item, field, button, or keyboard key	From the Go To drop-down menu, select Administration .
Arial font	Indicates that this is text you type into a field	Type ASSET_NDX8 in this field.
Courier font	Indicates programming code, a system message, or part of a screen display	Maximo displays the following message: Work order 1000 status changed to APPR.

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Typographical Conventions continued

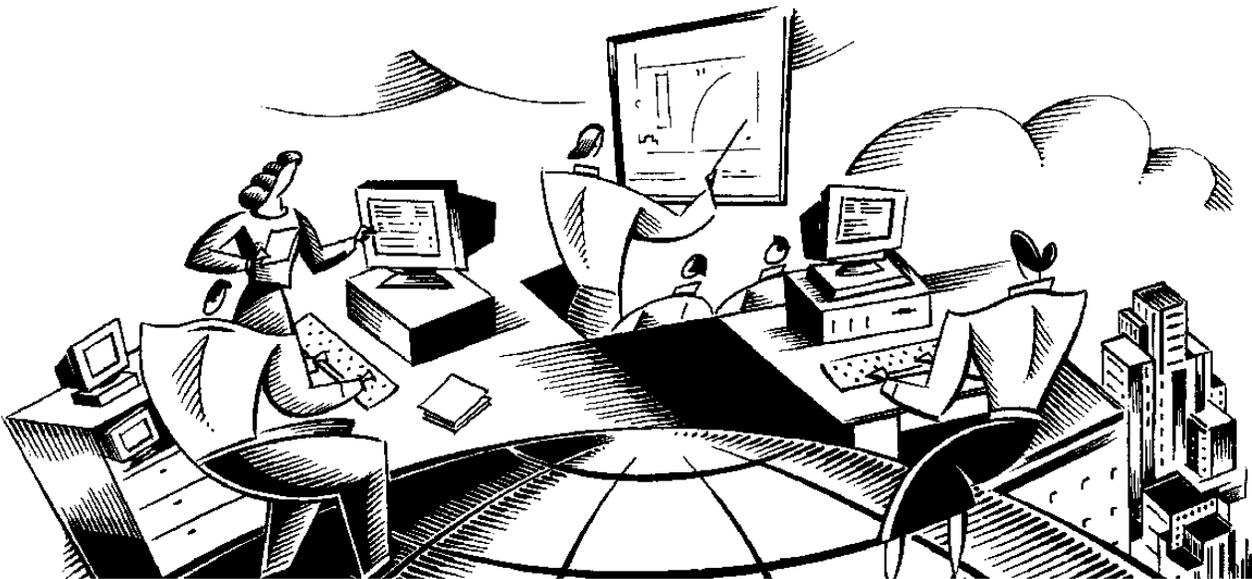
Icons

You will see several icons throughout this student guide. This table explains what they mean.

This icon...	Indicates...
	A procedure that you will practice on your own or with guidance from an instructor
	A paper-and-pencil exercise
	A special note or reminder
	A warning or cautionary note
	A question-and-answer session with the instructor, or a group discussion
	Your role in the next exercise is changing, e.g., from manager to user
	The data you are being asked to enter will be used in another exercise
	A challenge question or exercise
	An industry best practice, tip, or suggestion
	A recording that provides additional course content is available

IT Asset Configuration and Management in MXES

Unit 2: Planning



In This Unit

This unit contains the following chapters:

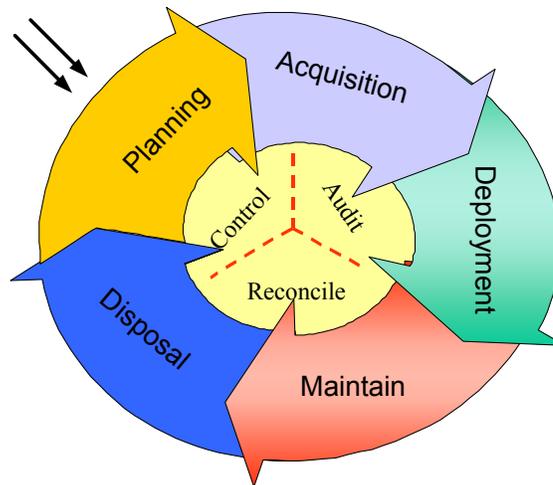
Chapter	Subject
2	Identifying Needed Assets
3	Identifying Vendors
4	Contracts

Unit Purpose

The purpose of this unit is to provide you with instruction on how Maximo supports the planning phase in asset configuration and management.

Planning and the IT Lifecycle

Planning and the IT Lifecycle



This graphic represents the typical asset lifecycle. It is circular because, as an asset manager, you are constantly involved in all aspects of the IT assets lifecycle. Maximo delivers comprehensive lifecycle asset management based on ITIL. IT assets can be managed to maximize the value they deliver to the business by ensuring software license compliance; lowering costs on leases, acquisitions and inventory; and delivering high-quality IT services to the business. Each unit of this course represents one of the aspects pictured in the lifecycle above. This unit focuses on planning. We can break down the planning phase into smaller pieces.

Planning

The first phase in the lifecycle of any IT asset is planning. This is where you make decisions regarding what you plan to purchase, and the standards, vendors, and the contracting vehicles you will use. We will discuss how Maximo assists you in all these components of the planning phase.

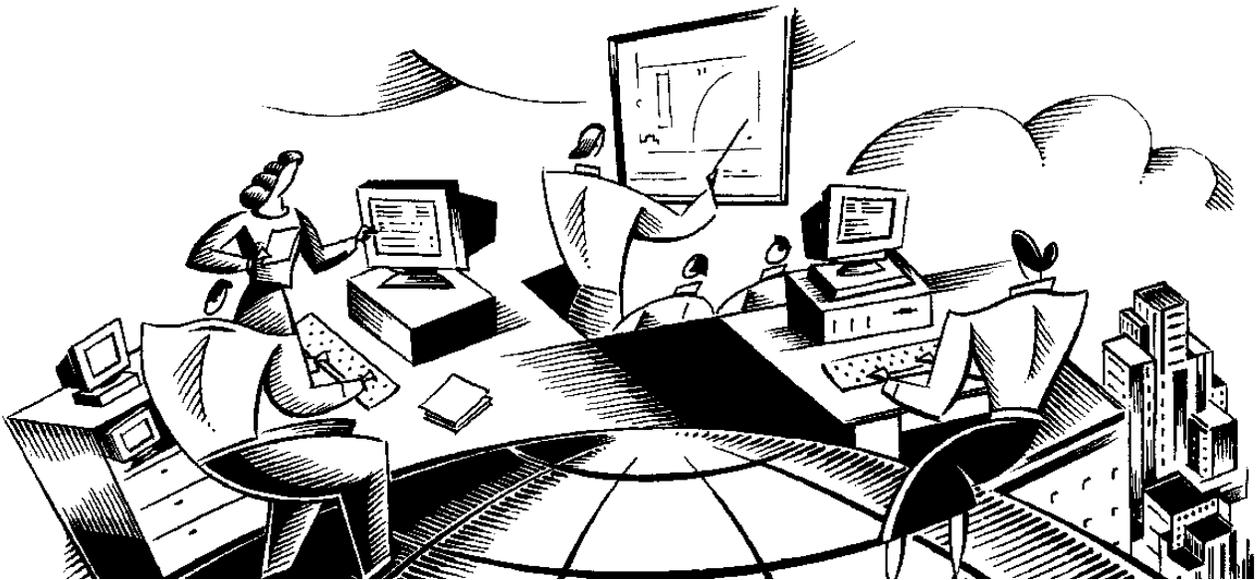
Unit Scenario

Scenario

You are the IT asset manager for a software development company. As such, you must assess IT requirements, evaluate vendors, coordinate and execute asset and software contracts, acquire hardware and software, and deploy and manage assets. You have been approved to upgrade all the laptops for your sales force. However, you have not decided whether to stay with your current laptop and go for a higher-end model, or completely change brands. In this unit you will choose the laptop you will buy, decide on a vendor, and apply a contract to the laptop.

IT Asset Configuration and Management in MXES

Chapter 2: Identifying Needed Assets



In This Chapter

This chapter contains the following topics:

Topic	See Page
Chapter Overview	2-1
Terms and Definitions	2-2
The Item Master Application	2-4
Creating an Item Record	2-9
Adding an Item to a Storeroom	2-11
Classifications	2-13
Assigning a Classification to an Item	2-14
Item Assembly Structures	2-16
Chapter Summary	2-19
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Chapter Overview

Introduction

In this chapter you will create an item master for the laptops you are going to purchase.

Chapter Focus

This chapter focuses on using the Item Master and the Items applications.

Learning Objectives

When you have completed this chapter, you should be able to:

- plan for and set up IT assets,
 - create an IT item master,
 - create an IT item record, and
 - apply an item assembly structure to an item.
-

Terms and Definitions

Terms and Definitions

The following terms will be used throughout the course, so it will be useful for you to become familiar with them.

Item Set: Item sets allow multiple organizations in a company to view, insert, and choose from a common set of items. An organization can be associated with only one item set. However, multiple organizations can use the same item set. Item sets are identified by a unique item set identifier, with each item in the set having a unique item number. When organizations are created, an item set is assigned to that organization to use. When you create an item, by default the item is cataloged into the item set associated with the organization to which your default insert site belongs.

Items: Records for items that your organizations use and that you stock in storerooms. Examples of items include materials, supplies, equipment, software, and hardware.

Rotating Item: A rotating item is an individual serialized asset that you define with a common item number. You designate an item as rotating because you want to be able to create individual asset records using the information (Classification, Specification, Item Assembly Structure) contained on the item record. A rotating item can have inventory value and issue cost, like an item. However, a rotating item cannot be consumed; rather, it is maintained like an asset.

Rotating Asset: Rotating assets are assets that are interchangeable, such as PC monitors. Rotating assets have both a unique asset number and an inventory item number. The item number lets you track assets as a group as they are moved into and out of inventory and other types of locations, while the asset number is useful to track individual instances of the asset as it is moved from one location to another and from one site to another.

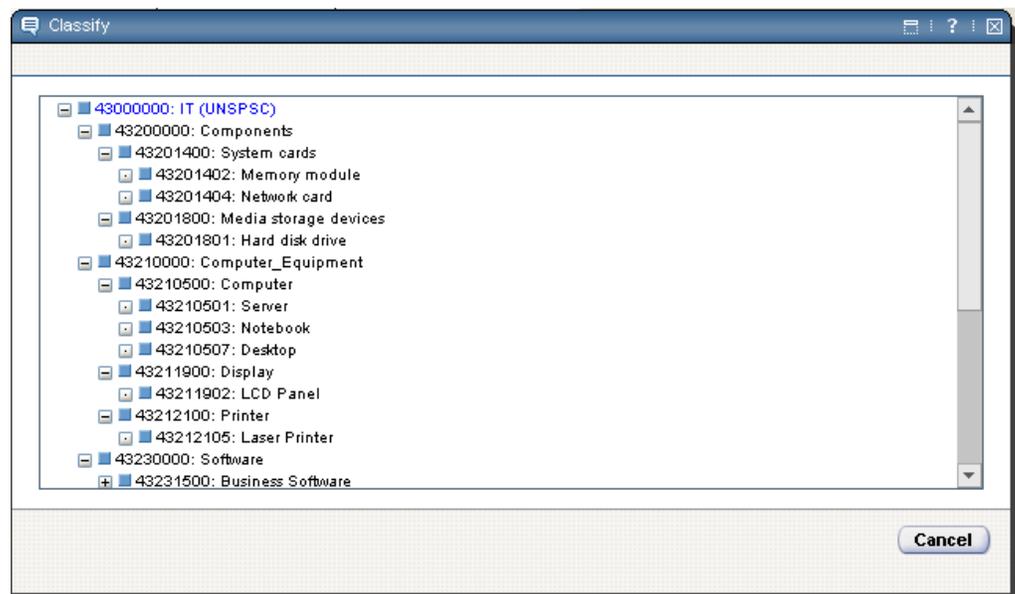
For example, a company might have twenty identical (same make, same model) laptops, so all twenty laptops would have the same item number. To track the use, repair, and locations of each individual laptop, each laptop would have its own, unique asset number. Before you can create a record for a rotating asset in the Assets application, the rotating item record must first be created in the Item Master application.

continued on next page

Terms and Definitions continued

Terms and Definitions

Classification: A classification is a means of identifying something. For example, server, ticket, computer, 1021— each can be a classification. A classification is a word, a number, or an alphanumeric. A classification can stand alone, or you can group it with other classifications for further descriptions.



While you can create your own classification structure in Maximo, you can also use United Nations Standard Products and Services Classification (UNSPSC) codes. UNSPSC codes are an open, standard coding system to classify both products and services for use throughout the global marketplace. This is not a product code (describing the product and specifications), but rather a hierarchical classification system consisting of five levels. Organizations can use as many or as few of the hierarchy levels as they need. Using UNSPSC codes can enable you to organize and define your classification structure more efficiently.

The Item Master Application

Introduction

You use the Item Master application to add an item record. An item record identifies the item, and lets you associate information to an item.

When you create item records, you can:

- define the main attributes of the item;
 - list the condition codes applied to the item;
 - create condition-enabled items to track the value of an item as its condition changes;
 - add the item to one or more storerooms; and
 - define other information related to the item, such as vendors that carry the item, item specifications, and item assembly structures (IAS).
-

Tabs and Functions

The following table describes the tabs on the Item Master application:

Use this tab...	To...
List	Search the database using any combination of available fields.
Item	Enter, view, or modify items, and specify alternate items.
Storerooms	View a read-only list of information about storerooms that stock the item. This tab displays information about the item at the specified storeroom location.
Vendors	Enter or view information on one or more vendors for an item, as well as associated information such as manufacturer, model, and catalog number. An item can have one or more vendors.
Specifications	Classify an item and enter attributes specific to the item. For example, you could classify an item as a computer and then assign it attributes such as RAM, Hard Drive Size, Processor Speed, and so forth. Setting up these attributes determines how easily one can compare assets against the discovered assets.
Item Assembly Structure	Enter, view, and modify an IAS.

continued on next page

The Item Master Application continued

Item Tab Fields

When you create an item, you begin by entering information on the Item tab. The following table describes the various fields on the Item tab. Although we are providing you with descriptions of each of these standard fields, you will probably not use the majority of them for managing IT assets.

Field	Description
Item	ITEM.ITEMNUM Identifies the item record. This value must be unique for all item records. Click the Detail Menu button to view items by classification or availability.
Commodity Group	ITEM.COMMODITYGROUP The commodity group associated with the item. By associating an item to a commodity group, you can analyze spending by transaction or by vendor based on that commodity group. In addition, commodity groups can be tied to specific GL resource codes to further track spending using resource accounting. See the <i>Finance Manager's Guide</i> for more information. This field is rarely used in IT asset management.
Commodity Code	ITEM.COMMODITYCODE The commodity code associated with the item. Within the commodity group, you can define a second level of classification: the commodity code. By associating an item to a commodity code you can analyze spending by transaction or by vendor based on that commodity code. This field is rarely used in IT asset management.
Meter Group	ITEM.GROUPNAME Meter group for the item. This attribute pertains to rotating items only. When an asset that references a rotating item is created, and the item has a meter group, all of those meters are automatically copied to the new asset record. This field is rarely used in IT asset management.

continued on next page

The Item Master Application continued

Item Tab Fields continued

Field	Description
Meter	ITEM.METERNAME Meter associated with the item. This is the meter for which a reading is to be recorded when this item is issued to an asset. Only non-rotating items can be associated with a meter. This field is rarely used in IT asset management.
Lot Type	ITEM.LOTTYPE Specifies whether the item is tracked by lot (LOT) or is not a lotted item (NOLOT). LOT is used for an item that is lotted, typically has an expiration date, and is able to be assigned lot numbers upon receipt. NOLOT means that the item does not need to be tracked by lots.
Item Set	ITEM.ITEMSETID When organizations are created, an item set is assigned to that organization to use. When you create an item, by default the item is cataloged into the item set associated with the organization to which your default insert site belongs.
Order Unit	ITEM.ORDERUNIT The unit used to order the item. For example, you might order a certain item from the vendor by CASE.
Issue Unit	ITEM.ISSUEUNIT The unit used to issue the item out from the storeroom, as well as track the number of the item in the storeroom. For example, you might order the item from the vendor by CASE, but issue it out as EACH.
MSDS	ITEM.MSDSNUM Material Safety Data Sheet (MSDS) number mandated by the Occupational Safety and Health Association (OSHA).

continued on next page

The Item Master Application continued

Item Tab Fields continued

Field	Description
Capitalized?	<p>ITEM.CAPITALIZED</p> <p>Yes/No check box that specifies whether the item is to be financially accounted for as a capitalized or noncapitalized cost. Selecting this check box indicates that the item is capitalized. An empty check box indicates a noncapitalized item (the default). You can change the setting for this field only by using the Capitalized Cost Adjustment action.</p> <p>Capitalized items will always be issued and returned at zero cost, regardless of the cost carried in inventory. Noncapitalized items will be issued and returned at the standard, last, or average cost, as specified in Multisite.</p>
Kit?	<p>ITEM.ISKIT</p> <p>Yes/No check box that specifies whether the ITEM record is a Kit record. Selecting this check box indicates that the item is a kit.</p>
Attachments	<p>The field contains a Detail Menu item from which you can View, Add New, or Add from Library any attachments you want to associate with the item.</p>
Condition Enabled?	<p>ITEM.CONDITIONENABLED</p> <p>Yes/No check box that sets the item as condition enabled. After you select the Condition Enabled check box, the screen shows the Condition Codes table window beneath the Alternate Items table window.</p>

continued on next page

The Item Master Application continued

Item Tab Fields continued

Field	Description
Rotating?	ITEM.ROTATING Yes/No check box indicates whether the item is a rotating asset. Selecting the check box indicates that this is an asset tracked by item number and individual asset number. The default is an empty check box.
Outside?	ITEM.OUTSIDE Yes/No check box indicates consignment goods. Select the check box if the item belongs to a contractor (or vendor) but is stored on site, and is an item for which you expect to be charged for its use. The default is unchecked.
Inspect on Receipt?	ITEM.INSPECTIONREQUIRED Yes/No check box indicates whether to hold items being received out of inventory until the purchase order receipt has been approved.
Add as Spare Part?	ITEM.SPAREPARTAUTOADD Yes/No check box indicates whether Maximo will add this item as a spare part for the asset on issue, if the item is not already a spare part. Selecting the check box adds this item as a spare part.
Attach to Parent Asset on Issue? 	Yes/No check box indicates whether Maximo will attach this item to its parent asset when it is issued from the storeroom. Only rotating items can be attached to a parent asset on issue. <u>Note:</u> This is a very important field, as it determines whether the item will be associated to the asset or the location. For example, if you issue Office XP to John Doe for his laptop, and this box is <i>NOT</i> checked, the asset will be its own parent under that location. If the box <i>IS</i> checked, Office XP will become a subassembly of the parent asset. Therefore, any item that will never stand alone will need to have this box checked.

Creating an Item Record

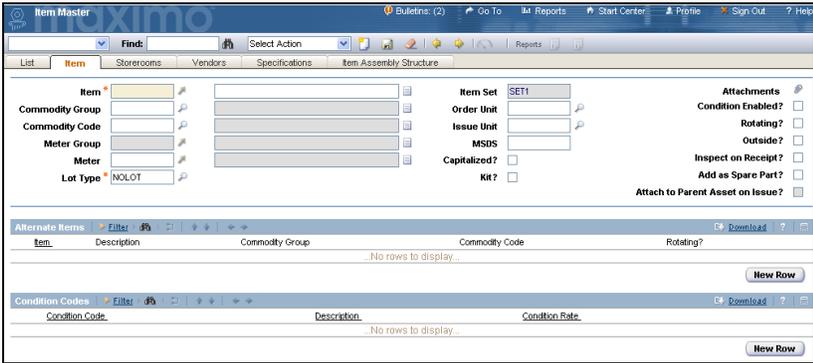
Introduction

You create an item record in the Item Master application. For this exercise, we will create an item record for the new laptops that we are going to purchase.

Exercise: Creating an Item Record

To create a new item, complete the following steps:



Step	Action
1	<p>From the Item Master application, click New Item  on the toolbar.</p> <p><u>Result:</u> A new record opens on the Item tab.</p> 
2	Enter D601xx (where xx is your student number if you require it) in the Item field.
3	Enter Standard Laptop for Sales Force in the description field.
4	Enter EACH for both the Order Unit and the Issue Unit fields.
5	Click to check the Rotating? check box.
6	Click to check the Inspect on Receipt? check box.
7	Save the record.

continued on next page

Creating an Item Record continued

Note on Rotating Items



In the exercise we just completed, we marked our laptop as a rotating item. Remember, a rotating item is an individual serialized asset that you define with a common item number. You designate an item as rotating because you want to be able to create individual asset records using the information (Classification, Specification, Item Assembly Structure) contained on the item record. A rotating item can have inventory value and issue cost, like an item. However, a rotating item cannot be consumed; rather, it is maintained like an asset.

Example: We will have 10 laptops of the same model that share the same attributes, and they will all have the common item ID *D601*. However, we want to be able to track each of our laptops individually, so we flagged it as rotating.

Adding an Item to a Storeroom

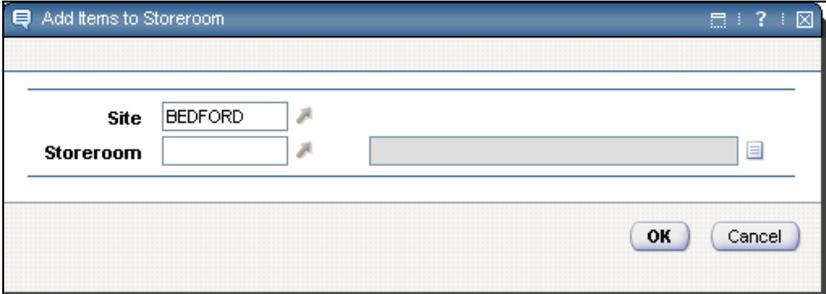
Introduction

Before you can create inventory transactions for an item (receipts, issues, transfers), the item must exist as part of the master stock list for a storeroom. Therefore, in the following exercise we will add our new item to a storeroom.

Exercise: Adding an Item to a Storeroom



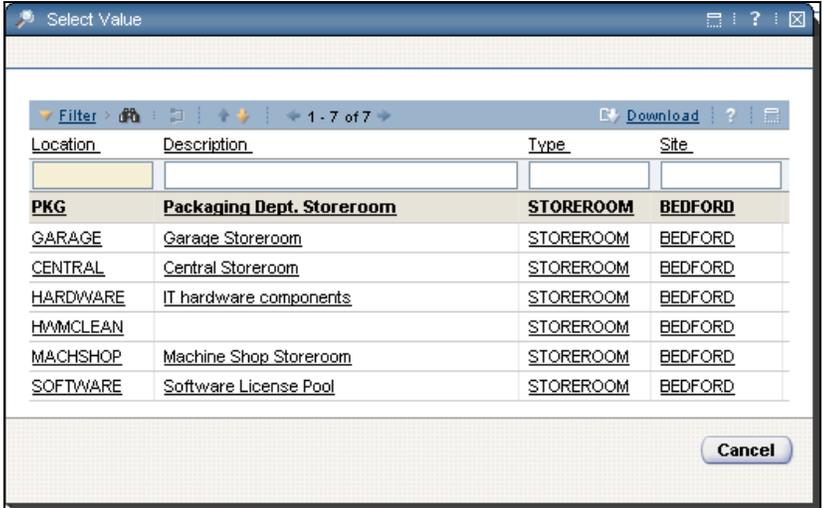
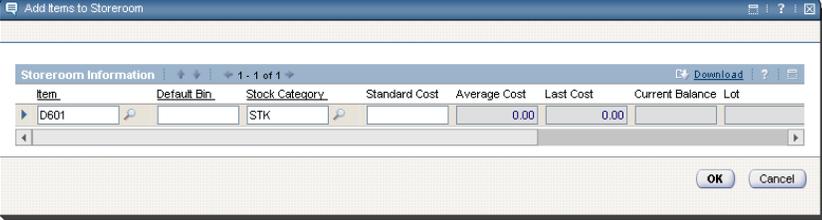
To add an item to a storeroom, complete the following steps:

Step	Action
1	<p>With item D601xx open, select Add Items to Storeroom from the Select Action menu.</p> <p><u>Result:</u> The Add Items to Storeroom dialog box opens.</p> 

continued on next page

Adding an Item to a Storeroom continued

Exercise: continued
Adding an Item to a Storeroom

Step	Action
2	<p>Click the Detail Menu button for the Storeroom field, then choose Select Value.</p> <p><u>Result:</u> Maximo displays a list of storerooms for the site.</p> 
3	<p>Click on HARDWARE, then click OK.</p> <p><u>Result:</u> The Add Items to Storeroom dialog box opens to the Storeroom Information table.</p> 
4	<p>Click OK, then save the record.</p> <p><u>Result:</u> The item is added to the storeroom, and will now appear on the Storerooms tab.</p>

Classifications

Introduction

Maximo includes functionality called *classifications* to help companies keep track of their increasingly complex list of assets. Classifications enable you to logically store information, and can aid you in retrieving historical data from other applications within Maximo. In this section we will learn more about how classifications are used and assign a classification to the item we just created.

Classifications

Classification structures are similar to directory structures in construction and in the way they are displayed. You also build a classification structure the same way; that is, from the top down in parent-child relationships. First you create a parent (a classification), then you add its children (each is also a classification), which belong to the parent. Each child can then become a parent and have its own children. This can go on indefinitely. The structure from the top-level parent to the child you are working with is called the *classification path*.

For example, you might create a classification called IT. Under it, you might create two children, *hardware* and *software*, which belong to IT. Each is also a classification. *IT* is the parent of the child *hardware*. Next you might create a child called *printers* under *hardware*. *Hardware* is now a parent to *printers*. The classification path to printers is: IT \ HARDWARE \ PRINTERS.

This can be read as “printers belong to hardware; hardware belongs to IT.”

At the top level, you can have just one classification or you can have multiple classifications.

Classifications are created in the Classifications application in the Administration module. They can be set up with United Nations Standard Products and Services Classification (UNSPSC) codes in order to associate that information with your asset.

Attributes

An *attribute* is a means of grouping characteristics of a classification. An attribute's name can be either alphanumeric or numeric. You can use attributes with assets, locations, or items. For example, for a classification path of COMPUTER \ PROBLEM you might have an attribute of MEMORY SIZE.

Assigning a Classification to an Item

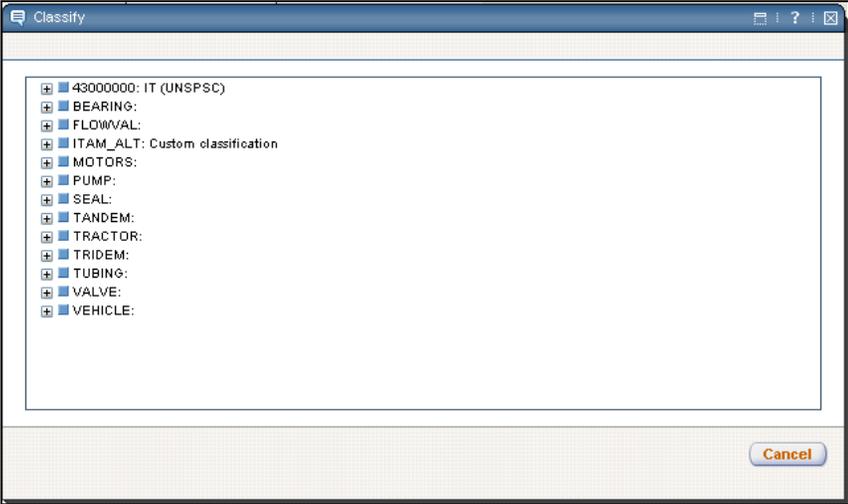
Introduction

For this exercise we are going to add a classification to our new item. In this case, we will be including the UNSPSC codes as well.

Exercise: Assigning a Classification to an Item



To assign a classification to the item we created, complete the following steps.

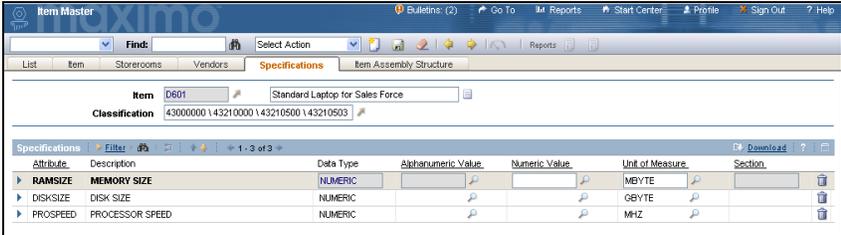
Step	Action
1	With the laptop item open in the Item Master application, click on the Specifications tab.
2	<p>Click on the Detail Menu icon next to the Classification field, and select Classify from the drop-down menu.</p> <p><u>Result:</u> The Classify dialog window opens.</p> 

continued on next page

Assigning a Classification to an Item continued

Exercise:
Assigning a
Classification to
an Item

continued

Step	Action																												
3	<p>Drill down 43000000: IT (UNSPSC)/Computer_Equipment/Computer/Notebook and select: 43210503 Notebook Computer by clicking on the blue square  icon next to it.</p> <p><u>Result:</u> The classification/UNSPSC along with its place in the hierarchy is populated in the Classification field. In addition, the Attributes for this classification are populated.</p>  <p>The screenshot shows the 'Item Master' application window. The 'Specifications' tab is active, displaying a table of attributes for the selected item. The 'Classification' field is populated with the hierarchy: 43000000 \ 43210000 \ 43210500 \ 43210503. The specifications table includes columns for Attribute, Description, Data Type, Alphanumeric Value, Numeric Value, Unit of Measure, and Section.</p> <table border="1" data-bbox="565 995 1406 1083"> <thead> <tr> <th>Attribute</th> <th>Description</th> <th>Data Type</th> <th>Alphanumeric Value</th> <th>Numeric Value</th> <th>Unit of Measure</th> <th>Section</th> </tr> </thead> <tbody> <tr> <td>RAMSIZE</td> <td>MEMORY SIZE</td> <td>NUMERIC</td> <td></td> <td></td> <td>MBYTE</td> <td></td> </tr> <tr> <td>DISKSIZE</td> <td>DISK SIZE</td> <td>NUMERIC</td> <td></td> <td></td> <td>GBYTE</td> <td></td> </tr> <tr> <td>PROSPEED</td> <td>PROCESSOR SPEED</td> <td>NUMERIC</td> <td></td> <td></td> <td>MHZ</td> <td></td> </tr> </tbody> </table>	Attribute	Description	Data Type	Alphanumeric Value	Numeric Value	Unit of Measure	Section	RAMSIZE	MEMORY SIZE	NUMERIC			MBYTE		DISKSIZE	DISK SIZE	NUMERIC			GBYTE		PROSPEED	PROCESSOR SPEED	NUMERIC			MHZ	
Attribute	Description	Data Type	Alphanumeric Value	Numeric Value	Unit of Measure	Section																							
RAMSIZE	MEMORY SIZE	NUMERIC			MBYTE																								
DISKSIZE	DISK SIZE	NUMERIC			GBYTE																								
PROSPEED	PROCESSOR SPEED	NUMERIC			MHZ																								
4	Save the record.																												

Item Assembly Structures

Introduction

An *item assembly structure* (IAS) is a list of individual parts and subassemblies that you need to build an item. It defines a group of items that can be treated as one orderable entity. An IAS allows you to use a single SKU. In addition, an IAS can be used when you want to apply standard configurations to your PCs, laptops, or servers. After you create an IAS for an item, you can copy it to other items.

For example, you use the same basic configuration (monitor, software, and so forth) for all of the servers in your company. Rather than manually entering each of the component parts on all of the asset records, you can create an IAS that will be used for each of the servers. In addition, when you create a new item, you can copy an IAS from a previously created item.

Creating an IAS

There are several ways to create an IAS for an item, including the following methods:

- You can manually create one by adding items (by clicking the New Row button) in the Children table window of the Item Assembly Structure tab in the Item Master application.
- You can use an existing item's IAS as a template and copy it to another item record. If an existing IAS is very similar to what you need, this functionality can save you time compared with creating a new IAS. For the following exercise, we will use this method.

While you can use any item as the top level of an IAS, you can apply an IAS to an asset only if you mark the parent item as a rotating item.



Note: You can also apply the item assembly structure when you receive the asset, thereby creating the asset hierarchy. We will cover that more in Chapter 7, "Receiving."

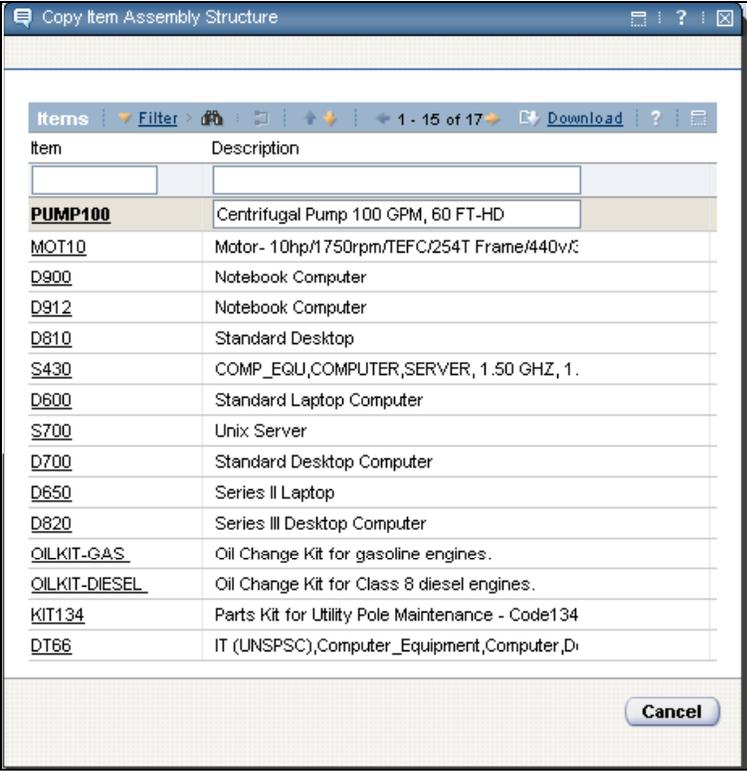
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Item Assembly Structures continued

Exercise:
Copying an IAS
to an Item



For this exercise, we will copy an existing IAS to our newly created laptop.

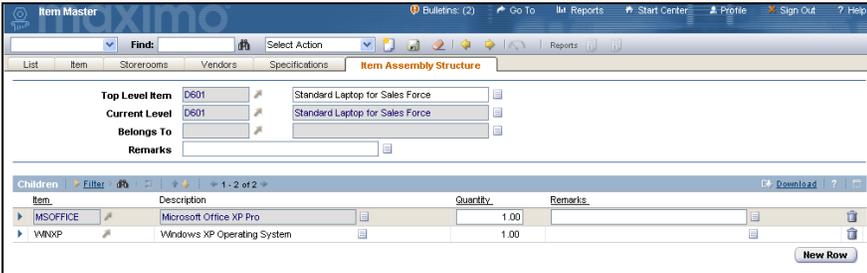
Step	Action
1	With the laptop item (D601xx) open in the Item Master application, click on the Item Assembly Structure tab.
2	<p>Select Copy Item Assembly Structure from the Select Action menu.</p> <p><u>Result:</u> The Copy Item Assembly Structure dialog box opens.</p> 

continued on next page

Item Assembly Structures continued

Exercise:
Copying an IAS
to an Item

continued

Step	Action
<p>3</p>	<p>Click on item D600. <u>Result:</u> The IAS for item D600 is copied to the item you created.</p> 
<p>4</p> 	<p>Save the record. <u>Note:</u> After you copy an IAS to a record, you can modify it without affecting the record from which it was copied. For example, you can add another piece of software to the IAS for item D601 without affecting the IAS for item D600.</p>

Chapter Summary

Item Master Application

You use the Item Master application to define items that will be stocked in your storerooms. You group these items in an item set, which can then be shared by the organizations using that item set.

When you create an item record, you define the main attributes of the item (such as commodity codes, order and issue units, whether the item is lotted, rotating, or condition-enabled), along with any alternate items that you can use in its place and a list of the condition codes you want applied to the item.

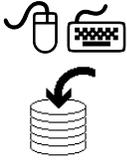
There are six tabs on the Item Master application: List, Items, Storerooms, Vendors, Specifications, and Item Assembly Structure.

Item Assembly Structures

An item assembly structure (IAS) is a list of the components that are bundled with the item; for example, the standard software that you install on a computer. While you can use any item as the top level of an IAS, you can apply an IAS to an asset only if you mark the parent item as a rotating item.

Workshop

Exercise



You are now going to put your new knowledge to work to enter a new item record into the database, apply an item assembly structure to it, and add it to a storeroom.

Step	Action																				
1	In the Item Master application, create an item record using the following information: <table border="1" data-bbox="492 695 1289 1150"> <thead> <tr> <th data-bbox="492 695 792 730"><u>Field</u></th> <th data-bbox="792 695 1289 730"><u>Value</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="492 730 792 772">Item</td> <td data-bbox="792 730 1289 772">S341xx</td> </tr> <tr> <td data-bbox="492 772 792 814">Description</td> <td data-bbox="792 772 1289 814">Database Server 3.33 GHz, 32GB</td> </tr> <tr> <td data-bbox="492 814 792 856">Commodity Group</td> <td data-bbox="792 814 1289 856">43211500</td> </tr> <tr> <td data-bbox="492 856 792 898">Commodity Code</td> <td data-bbox="792 856 1289 898">43211501</td> </tr> <tr> <td data-bbox="492 898 792 940">Order Unit</td> <td data-bbox="792 898 1289 940">EACH</td> </tr> <tr> <td data-bbox="492 940 792 982">Issue Unit</td> <td data-bbox="792 940 1289 982">EACH</td> </tr> <tr> <td data-bbox="492 982 792 1024">Rotating?</td> <td data-bbox="792 982 1289 1024">[checked]</td> </tr> <tr> <td data-bbox="492 1024 792 1066">Inspect on Receipt?</td> <td data-bbox="792 1024 1289 1066">[checked]</td> </tr> <tr> <td data-bbox="492 1108 792 1150">Classification</td> <td data-bbox="792 1108 1289 1150">43210501</td> </tr> </tbody> </table>	<u>Field</u>	<u>Value</u>	Item	S341xx	Description	Database Server 3.33 GHz, 32GB	Commodity Group	43211500	Commodity Code	43211501	Order Unit	EACH	Issue Unit	EACH	Rotating?	[checked]	Inspect on Receipt?	[checked]	Classification	43210501
<u>Field</u>	<u>Value</u>																				
Item	S341xx																				
Description	Database Server 3.33 GHz, 32GB																				
Commodity Group	43211500																				
Commodity Code	43211501																				
Order Unit	EACH																				
Issue Unit	EACH																				
Rotating?	[checked]																				
Inspect on Receipt?	[checked]																				
Classification	43210501																				
2	Copy the IAS from Item S430 to the item.																				
3	Add the item to storeroom HARDWARE.																				

Review Questions

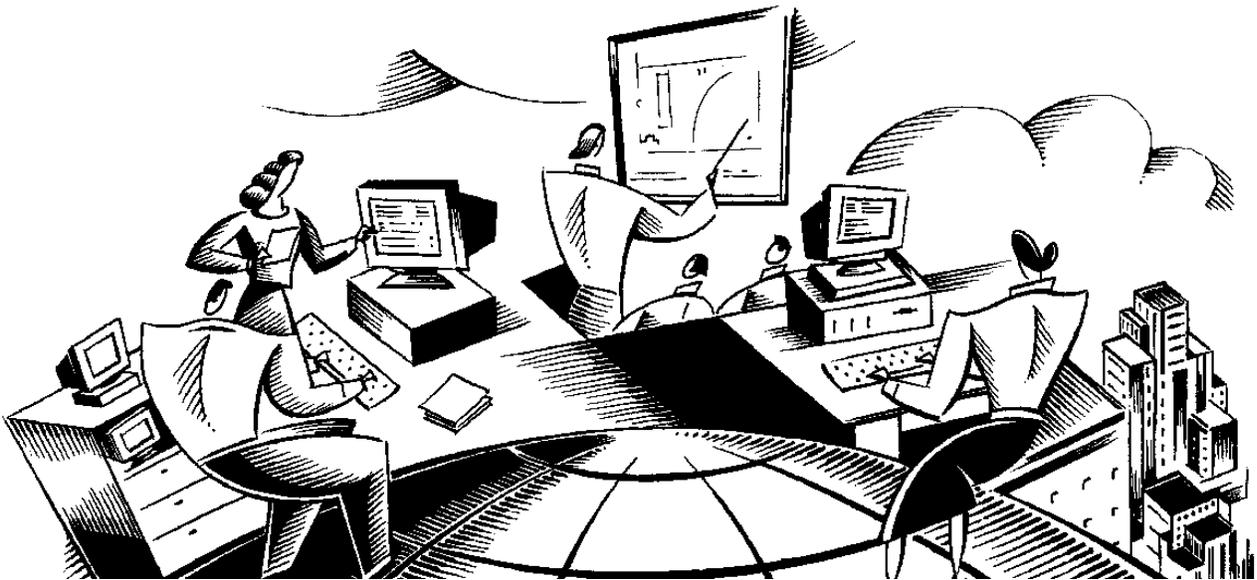
Review Questions



1. Why would you use a classification?
 2. What is the difference between a rotating item and a rotating asset?
-

IT Asset Configuration and Management in MXES

Chapter 3: Identifying Vendors



In This Chapter

This chapter contains the following topics:

Topic	See Page
Chapter Overview	3-1
The Company Master Application	3-2
Creating a Company Master Record	3-5
The Companies Application	3-7
Using the Companies Application	3-11
Modifying Company Records	3-15
Associating an Item with a Vendor	3-17
Chapter Summary	3-18
Workshop	3-19
Review Questions	3-20

Chapter Overview

Introduction

The Company Master and Companies applications enable you to keep track of your software and hardware vendors.

The **Company Master** application is used to define companies that belong to a company set.

The **Companies** application, in the Purchasing module, is used to change the default information about a company.

Chapter Focus

This chapter focuses on using the Company Master and the Companies applications.

Learning Objectives

When you have completed this chapter, you should be able to:

- create a company master,
 - update company records, and
 - delete company records.
-

The Company Master Application

Introduction

As stated previously, you can use the Company Master application to define the company master records that belong to a company set. Company sets are similar to item sets in that they allow companies to be shared across organizations. You define the company set in the Sets application. When creating a company set, you can specify whether a company record should create a master. If you don't, then you must use the company master to create all company records.

In order to use a company record in an organization, you must add the company master record to the organization. This adds the company master record to the Companies table. Company master records contain information like vendor currency, contacts, and so forth, and they are copied to the company record as default data when the company master record is added to organizations.

If you need to change the default information in a company record, then you can use the Companies application to modify the record.

The Company Master Application

The Company Master application has four tabs. The **Company Master** tab is where you enter all the information about the company.

The screenshot shows the 'Company Master' application interface. At the top, there is a navigation bar with 'Buletins: (1)', 'Go To', 'Lit. Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar with 'Find:' and a 'Select Action' dropdown. The main content area has three tabs: 'Company Master' (selected), 'Contacts', and 'Addresses'. The 'Company Master' tab contains several sections:

- Company Information:** Company (KENNEDY), Company Set (COMPSET1), Customer #, Home Page, Company Type (dropdown), and Update Related Companies? (checkbox).
- Purchasing Details:** Currency (USD), Tax Exempt Code, Tax Exempt Number, Disqualified Vendor? (checkbox), Freight Terms, FOB Point, Ship Via, Registration #, and Inspection on Receipt? (checkbox).
- Payment Details:** Bank, Bank Reference #, DUNS # (178192480-X-T), Pay To, and Payment Terms.
- E-Commerce Details:** E-commerce Enabled? (checked), Punchout Enabled? (checked), E-commerce Supplier (100000941), Catalog (KENNEDY), E-commerce Supplier Location, Automatically Approve Receipt on ASN? (checked), Vendor Sends Order Status? (checked), Send Vendor Transaction on PO Cancel? (checked), Vendor Sends ASN? (checked), Vendor Sends Invoice? (checked), Automatically Approve Invoice? (checked), and Default Warehouse.

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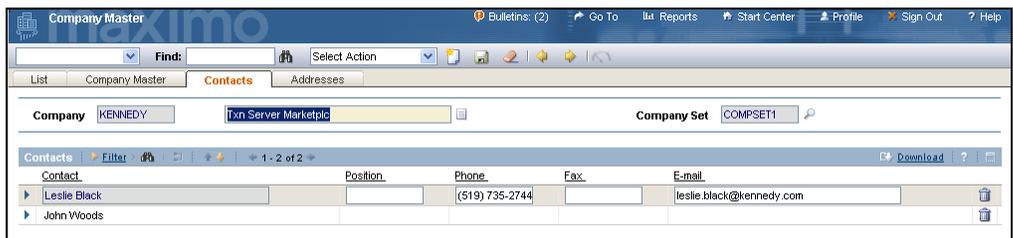
The Company Master Application continued

The Company Master Application

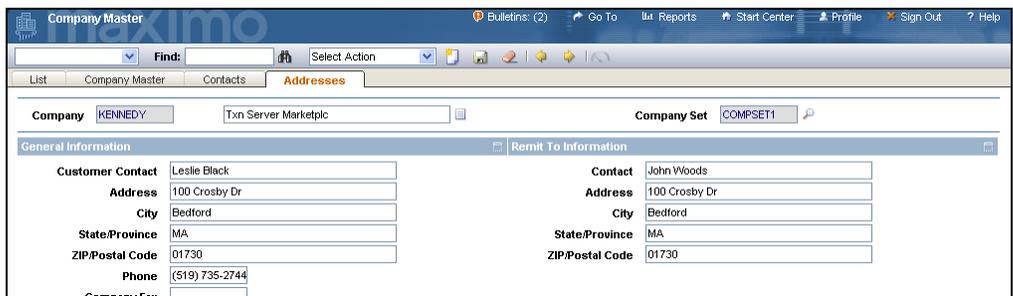
continued

Most of the **Company Master** tab fields are fairly self-explanatory. The **Update Related Companies?** check box, when checked, indicates that a change in the company master record should propagate to the corresponding records in the Companies table. This field is not stored in the database and thus should be explicitly checked when you update the company master record. If the check box is cleared, modifying the company master record will not affect the corresponding record in the Companies table.

The **Contacts** tab contains contact information for people in that company.



The **Addresses** tab is where you can add and modify a company's General and Remit To contact information. Because the same company might have multiple locations, Maximo lets you designate a separate Remit To address and contact for billing purposes.



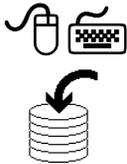
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The Company Master Application continued

- Company Types** You can group companies by type for reporting purposes. Maximo uses three default company types:
- **Courier** – transit company
 - **Manufacturer** – manufacturer of items or assets
 - **Vendor** – vendor of items or assets
- Your system administrator might have created customized company types specific to your business.
-

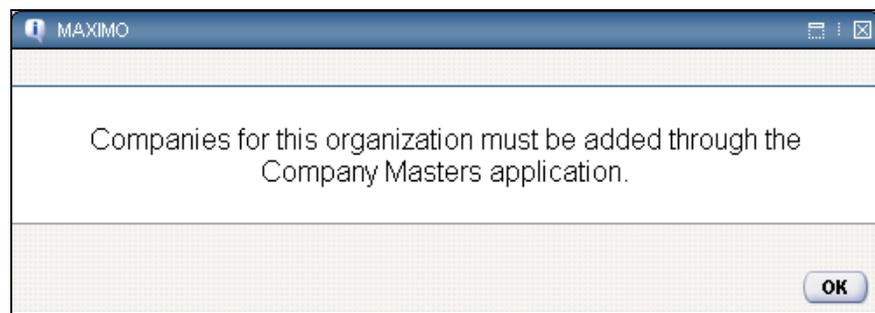
Creating a Company Master Record

Creating a Company Master Record



The Companies application lets you create a new company record if your system administrator has selected the **Automatically Add Companies to Company Master** check box in the Sets application. If this is not the case, then use the Company Master application to create a record. Selecting the **Automatically Add Companies to Company Master** check box automatically creates a company master record each time you create a new company record.

We will assume that your system administrator has not selected the Automatically Add Companies to Company Master check box. In this exercise, we will create a company master record for the vendor from whom we will purchase our laptops. If you try to add a new company from the Companies application, and your administrator has not allowed this, you will get the following error message:



Step	Action
1	Go to the Company Master application.
2	Click on the New Company Master  icon on the toolbar.
3	Enter Vantarxx in the Company field.
4	Enter Laptop wholesalers in the description field.
5	Click on the Select Value  icon next to the Company Type field and select Vendor .
6	Save the record.

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Creating a Company Master Record continued

Add Company Master to Organization



After you have created a company master record, you need to add the record to one or more organizations. In this short exercise, we will add the company master we just created to an organization.

Step	Action
1	In the company master we just created, choose Add Company Master to Organization from the Select Action menu.
2	Select the EAGLENA and EAGLESA check boxes. <u>Note:</u> The Add Company to Master Organization action displays a table window with all the organizations that use the company set and that are accessible by the current user. You can select all or a few organizations and Maximo will add the company master record to the selected organization(s). If one or more of the selected list of organizations already have the company master record, Maximo ignores those organizations and proceeds with the other organizations.
3	Click OK . <u>Result:</u> Maximo displays a box indicating that the company was created.
4	Click OK .

The Companies Application

Introduction

The Companies application maintains detailed information on vendors, manufacturers, and other companies.

Companies Tabs

The Companies application consists of five tabs: **List**, **Company**, **Contacts**, **Addresses**, and **Branches**.

The screenshot displays the 'Company' tab for 'ALMAR' in the Maximo application. The interface is organized into several sections:

- Company Information:** Includes fields for Company (ALMAR), Parent (Almar Petroleum), Customer # (3390214), Home Page (www.almar.com), Attachments, Company Type (M), Organization (EAGLENA), and Use Parent Remit To? (checkbox).
- Purchasing Details:** Includes Currency (USD), Tax Code (NJ), Tax Exempt Code, Tax Exempt Number, Pay Tax to Vendor? (checked), Disqualified Vendor? (checkbox), Freight Terms, FOB Point (PRINCETON, NJ), Ship Via (UPS-GR), Registration #, Inspection Required? (checkbox), Payment on Receipt? (checkbox), and Expiration Date of Insurance.
- Payment Details:** Includes Bank, Bank Reference #, DUNS #, Pay To, Payment Terms (NET 30), AP Control Account (6800-910-610), RBNI Account (6800-930-610), Suspense Account (6800-920-610), and Tool Control Account.
- E-Commerce Details:** Includes E-commerce Enabled? (checkbox), Punchout Enabled? (checkbox), E-commerce Supplier, Catalog, E-commerce Supplier Location, Automatically Approve Receipt on ASN? (checkbox), Vendor Sends Order Status? (checkbox), Send Vendor Transaction on PO Cancel? (checkbox), Vendor Sends ASN? (checkbox), Vendor Sends Invoice? (checkbox), Automatically Approve Invoice? (checkbox), and Default Warehouse.

continued on next page

The Companies Application continued

Companies Actions

The following actions are available from the Companies Select Action menu:

Use this action...	To...
Associate Commodities	Associate commodity groups and codes with a company record.
Add/Modify Commodity Codes	Add, modify, or delete commodity groups and commodity codes to be used by a company record.
View Contracts	View a read-only list of contracts that are associated with a company record.
Attachment Library/Folders	Create and maintain attachments between Maximo application records and documents. Attachments point to one or more documents that reside in an electronic library.
Duplicate Company	Create a copy of the current record with the same settings or values, which can then be modified and saved as a new record.
Delete Company	Delete the current record from the Maximo database.

continued on next page

The Companies Application continued

Company Tab Fields

The **Company** tab includes basic company information, as well as purchasing, tax, and currency data. This information is important to the purchasing and inventory process. The following table describes some of these fields.

Field Name	TABLE.COLUMN
Company	COMPANIES.COMPANY Identifier of the company.
Parent	COMPANIES.PARENTCOMPANY Identifier of the parent company.
Customer #	COMPANIES.CUSTOMERNUM The number used by an outside company to identify your own company.
Company Type	COMPANIES.TYPE The type of company. Click Select Value to select a value. The list provides three default types: C (courier), M (manufacturer), and V (vendor).
Use Parent Remit To?	COMPANIES.USEPARENTREMITTO Check box. When checked, indicates that the parent's Remit To information should be used. The default value is N. If you change this field value to Y, the payment information from the parent record displays on invoices created against the child company.
Currency	COMPANIES.CURRENCYCODE The currency that the company uses. This value is used for currency conversion when necessary. Click Select Value to open the Select Currency list and choose a value.
Tax Exempt Code	COMPANIES.TAXEXEMPTCODE Indicates whether the company is exempt from paying taxes (e.g., 1=exempt, 2=not exempt, 3=exempt resale, etc.). Click Select Value to choose a code.
Disqualified Vendor?	COMPANIES.DISABLED Check box. When checked, indicates that the company is disqualified from being used on new PRs, POs, RFQs, invoices, or any other application that references vendors.

continued on next page

The Companies Application continued

Company Fields continued

Field Name	TABLE.COLUMN
Freight Terms	COMPANIES.FREIGHTTERMS A description of what is being shipped; any riders to the shipping agreement should be included here. For example, you might specify "Fresh fruit. Perishable. Keep refrigerated. Must meet delivery dates."
FOB Point	COMPANIES.FOB Free on board point is the point where responsibility and liability are transferred. The FOB point is usually the destination or the shipping point.
Expiration Date of Insurance	COMPANIES.INSUREXPDATE. The expiration date of insurance for that vendor. This is insurance to cover liability when outside labor does work on the customer's site.
DUNS #	COMPANIES.DUNSNUM Data Universal Numbering System number, used to uniquely identify a company and its location.
AP Control Account	COMPANIES.APCONTROLACC The credit account used when the invoice is paid. Click Select Value to open the GL Account Navigator and select a value. For more information, consult the <i>Financial Manager's Guide</i> .
RBNI Account	COMPANIES.RBNIACC The account for receipts that have not been invoiced. Click Select Value to open the Select GL Account page and choose a value. For more information, consult the <i>Financial Manager's Guide</i> .
Suspense Account	COMPANIES.APSUSPENSEACC The credit account used when the invoice is approved. Click Select Value to open the Select GL Account page and choose a value. For more information, consult the <i>Financial Manager's Guide</i> .

Using the Companies Application

Introduction

You can use the Company tab to enter information about a company, including purchasing and payment information and information about whether the vendor is e-commerce enabled through Maximo. Your system administrator enables a company's Maximo e-commerce purchasing options.

Creating a Company Record

In Maximo, you can use the following steps to create company records, depending on your organization's business rules. The administrator might set it up so that companies for an organization must be added through the Company Master application.

You can add company branch records using the **Branches** tab, which is covered in greater detail in the next section.

Note: Remember, the **Customer #** field in the Companies application is used to store the number used by the vendor/company to identify your company in *their* database.

Although we will not create a company in the Companies application, you can do so by following the steps below.

Step	Action
1	Open the Companies application.
2	Click the New Company button on the toolbar. <u>Result</u> : Maximo switches to the Company tab, displaying a blank company record.
3	Fill in the company fields.
4	Save the record.

continued on next page

Using the Companies Application continued

Using Company Branches

Your company might determine that a product or service is purchased through a national vendor with local offices. You might have different operating locations in different cities, and each will make its purchases from the local branch of the vendor. Maximo allows you to associate branch records for a vendor company and track purchasing at the branch level or with the vendor as a whole.

You can use branches to track expenditures for each of your company's locations, as well as the total expenditures for all locations for each vendor. However, the branch hierarchy can be only one level deep with a parent company record and child branch records. Child records cannot be parents of other records, and parent records cannot be children of other records.

Use the **Branches** tab to create and remove associations between child and parent records. You can also manually enter a company record or use the Detail button to look up companies. The Select Company page includes only companies that are not already parent or child records.

Note: You associate branches to companies and cannot create branches from the company record. That is, the branch is first created using the same procedures you use when creating other company records.

continued on next page

Using the Companies Application continued

Adding Branches to Companies

You can associate only existing company records with the parent record. You cannot insert a new company record by adding a row to the Branches table window.

Although we will not add a branch to a company record in this course, you can do so by following the steps below.

Step	Action
1	Open or create a company record.
2	Select the Branches tab.
3	Click New Row . <u>Result</u> : The Row Details form opens.
4	Add a company branch: <ol style="list-style-type: none"> a. Click the Detail Menu button next to the Company field and click on Select Value. b. Select a record by clicking the Select button to the left of the record. c. (Optional) Change the Use Parent Remit To? option: <ul style="list-style-type: none"> • No (cleared)—The default. The payment information from the branch record is used on invoices created against the branch. • Yes (checked)—The payment information from the parent record is used on invoices created against the branch.
5	Choose one of the following options: <ul style="list-style-type: none"> • Click New Row to add another row. • Click Delete to delete the row.
6	Save the record.

continued on next page

Using the Companies Application continued

Disqualifying a Vendor

If your company decides to stop using a vendor, you can mark the record to indicate that the vendor is disqualified from doing business with your company.

The **Disqualified Vendor?** check box on the **Company** tab, when checked, disqualifies this company as a vendor, which means that you are not able to create *new* RFQs, PRs, POs, or invoices using this company as a vendor. The default is No—the box is cleared.

Disqualifying a vendor has no effect on existing transactions (e.g., POs and receipts) that already reference the vendor. A disqualified vendor affects only those records created *after* you disqualify the vendor. Therefore, Maximo does not allow new POs to be created from PRs for the vendor, but POs approved before the vendor was disqualified are still valid.

Deleting Company Records

Company records cannot be deleted if there are branch records associated with them. To delete a parent company record with associated child (branch) records, you must first sever all child relationships before you can delete the record. To sever child relationships, delete all the branches listed in the Branches table window.

However, a company record cannot be deleted if it is associated with other records (such as PRs, POs, and invoices) This is done to preserve the relationship between a purchasing document and a vendor record. If you want to remove a vendor record while a relationship with another record exists, you should consider disqualifying the vendor record instead.

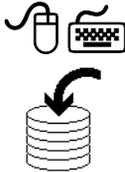
Companies Reports

The following reports are available for the Companies application:

- Vendor Contacts—Lists company name and descriptions for selected records.
-

Modifying Company Records

Modifying a Company Record



In this exercise we will modify the vendor record we created in the Company Master application.

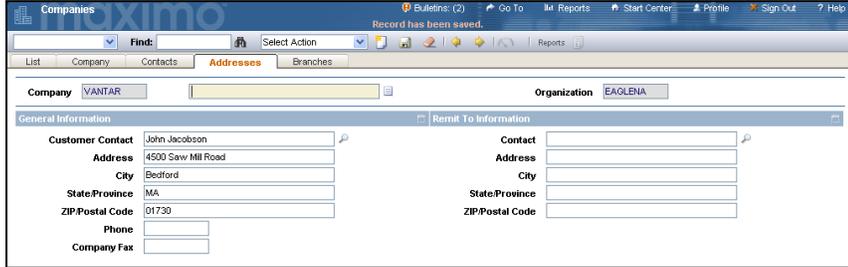
Step	Action																
1	Go to the Companies application.																
2	Search for and select the company you created for EAGLENA in the Company Master application (Vantarxx).																
3	Click on the Contacts tab.																
4	Click New Row .																
5	Enter the following contact information for your new company record: <table border="1" data-bbox="552 1008 1429 1386"> <thead> <tr> <th><u>Field</u></th> <th><u>Value</u></th> </tr> </thead> <tbody> <tr> <td>Contact</td> <td>John Jacobson</td> </tr> <tr> <td>Position</td> <td>Sales Consultant</td> </tr> <tr> <td>E-mail</td> <td>jjacobson@vantar.com</td> </tr> <tr> <td>Procurement Card #</td> <td>90078</td> </tr> <tr> <td>P-Card Exp Date</td> <td>[<i>One year from today's date</i>] <i>Hint: Use the Calendar icon.</i></td> </tr> <tr> <td>Phone</td> <td>781-555-2000</td> </tr> <tr> <td>Fax</td> <td>781-555-2001</td> </tr> </tbody> </table>	<u>Field</u>	<u>Value</u>	Contact	John Jacobson	Position	Sales Consultant	E-mail	jjacobson@vantar.com	Procurement Card #	90078	P-Card Exp Date	[<i>One year from today's date</i>] <i>Hint: Use the Calendar icon.</i>	Phone	781-555-2000	Fax	781-555-2001
<u>Field</u>	<u>Value</u>																
Contact	John Jacobson																
Position	Sales Consultant																
E-mail	jjacobson@vantar.com																
Procurement Card #	90078																
P-Card Exp Date	[<i>One year from today's date</i>] <i>Hint: Use the Calendar icon.</i>																
Phone	781-555-2000																
Fax	781-555-2001																
6	Click on the Addresses tab.																

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Modifying Company Records continued

Modifying a
Company
Record

continued

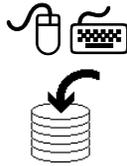
Step	Action												
7	<p>Enter the following address information in the General Information pane:</p> <table border="0"> <thead> <tr> <th><u>Field</u></th> <th><u>Value</u></th> </tr> </thead> <tbody> <tr> <td>Customer Contact</td> <td>John Jacobson</td> </tr> <tr> <td>Address</td> <td>4500 Saw Mill Road</td> </tr> <tr> <td>City</td> <td>Bedford</td> </tr> <tr> <td>State/Province</td> <td>MA</td> </tr> <tr> <td>Zip/Postal Code</td> <td>01730</td> </tr> </tbody> </table>	<u>Field</u>	<u>Value</u>	Customer Contact	John Jacobson	Address	4500 Saw Mill Road	City	Bedford	State/Province	MA	Zip/Postal Code	01730
<u>Field</u>	<u>Value</u>												
Customer Contact	John Jacobson												
Address	4500 Saw Mill Road												
City	Bedford												
State/Province	MA												
Zip/Postal Code	01730												
8	<p>Save the record.</p> <p><u>Result:</u> The information has been updated in the Maximo database.</p> 												

Associating an Item with a Vendor

Introduction

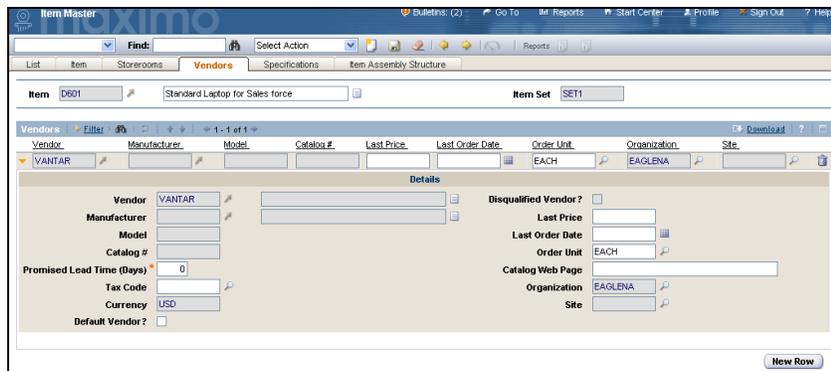
In this scenario, the vendor we created in the previous exercise will be our new supplier for the laptops we created in Chapter 2. Therefore, we will now associate the laptop (**D601xx**) with **Vantarxx**.

Exercise: Associating an Item with a Vendor



To associate an item with a vendor, complete the following steps.

Step	Action
1	Go to the Item Master application.
2	Search for and select the item you created in Chapter 2, D601xx .
3	Click on the Vendors tab.
4	Click New Row .
5	Enter Vantarxx in the Vendor field.
6	<p>Save the record.</p> <p><u>Result:</u> The item is associated with the vendor.</p>



Chapter Summary

Overview

You use the **Company Master** application to create company master records that belong to a particular company set.

The **Companies** application holds information about the companies with which you do business. The Inventory, Purchasing, and Assets modules use this information.

Role of the Company Master Application

Company master records contain information pertaining to companies, such as the default contact person of the company, purchasing, e-commerce, and payment details.

You can also use the Company Master application to associate a company master record with an organization. All company master records in Maximo belong to a company set. Company sets enable you to share information about companies among multiple organizations. Each organization is associated with a company set.

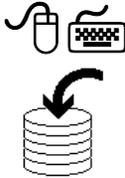
Role of the Companies Application

The information held by the Companies application, which is used throughout Maximo, includes the following:

- Tax and currency information
 - Tax codes
 - Information about associated general ledger accounts
 - Addresses
 - Contacts
-

Workshop

Exercise



You are now going to put your new knowledge to work and enter a new company record into the database. Use the following data to create a new record in the Company Master application.

Field	Value
Company	MULTI (or MULTlxx, where xx is your student number)
Description	Management Utility Linking Technology, Inc.
Company Type	V
Currency	USD
Tax Exempt Code	2
Customer Contact	[<i>Your Name</i>] (Hint: Use the Addresses tab.)
Address	2342 Pembroke Way
City	Lowell
State/Province	MA
Zip/Postal Code	00113
Phone	978-555-5200
Fax	978-555-5283

Add Company Master to an Organization



Add the newly created company to EAGLENA.

Checking Your Work



After you have entered all of the data, do the following:

- Go to the Companies application and search for the company you just created.
 - View the information on the various tabs.
-

Review Questions

Review Questions

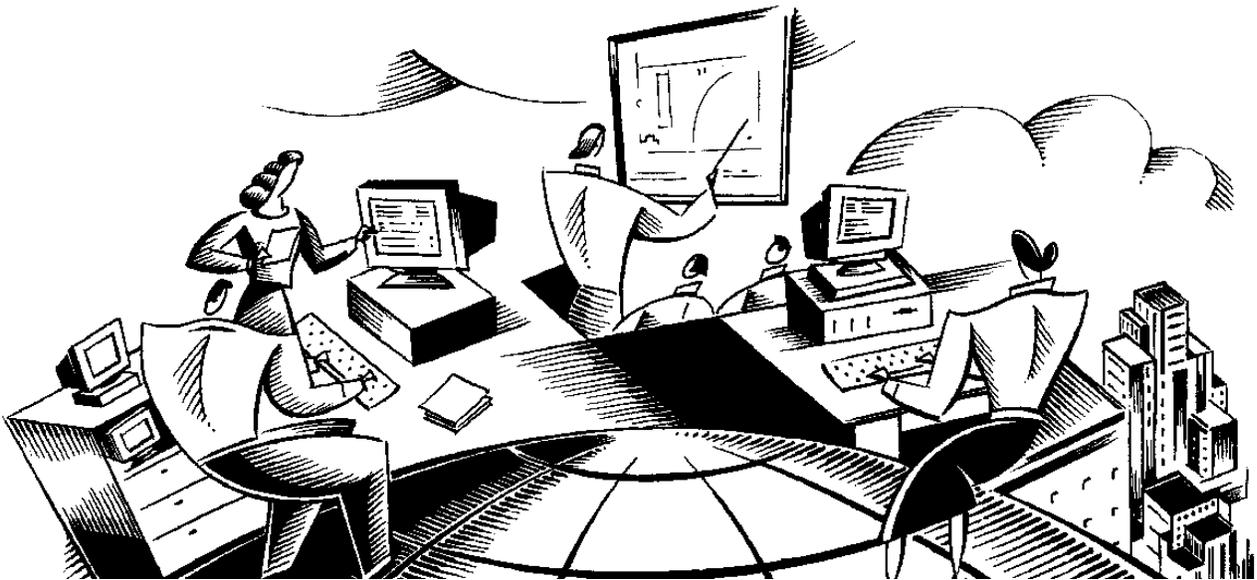


1. How are the Company Master and the Companies applications used?

 2. Under what circumstance can you create a company record in the Companies application?
-

IT Asset Configuration and Management in MXES

Chapter 4: Contracts



In This Chapter

This chapter contains the following topics:

Topic	See Page
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The Lease/Rental Contracts Application	4-20
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Chapter Overview

Introduction

A thorough inventory of contracts allows you to obtain a complete and accurate picture of your interactions with vendors. In addition, in order to comply with license agreements, you need to be in a position to enforce the terms and conditions that you negotiated in the contracts with your vendors. The Contracts module is one of the Maximo modules devoted to financial and purchasing functions. It consists of six applications: Purchase Contracts, Lease/Rental Contracts, Labor Rate Contracts, Master Contracts, Warranty Contracts, and Terms and Conditions.

Chapter Focus

This chapter focuses on using the Purchasing Contracts, Lease/Rental Contracts, Warranty Contracts, and Terms and Conditions applications in the Contracts module.

Learning Objectives

When you have completed this chapter, you should be able to:

- create and manage purchase contracts,
 - create and manage lease/rental contracts,
 - create and manage warranty contracts,
 - set up terms and conditions, and
 - create and manage software contracts.
-

Purchase Contracts

Introduction

Many organizations, large and small, purchase their software, hardware, supplies, or production materials off of a purchase contract. The purchase contract will govern the price and source of materials for the organization over the duration of the contract. Purchase contracts are a critical part of the procurement process in any organization.

The Purchase Contracts Application

You use the Purchase Contracts application to create, modify, and view purchase contracts with outside vendors. The Purchase Contracts application supplies details about a contract's shipping and financial terms, contact information, item and service pricing, and delivery times.

Four out-of-the-box types of purchase contracts are available: *price*, *blanket*, *software license*, and *standard* purchase.

The next sections will discuss these four types of contracts.

Price Contracts

A *price* agreement contract specifies the prices to be paid for specific items purchased from a specific vendor. Typically a price agreement is used to purchase services and/or materials at agreed-upon prices and terms.

Whenever you enter a catalog service or item on a purchase requisition or purchase order line, Maximo references the contract that applies to that service or item.

Blanket Contracts

A *blanket* contract is an agreement that an overall amount is going to be spent with a specified vendor over a particular time period. When any item or service is entered on a material request (MR) or purchase request (PR) for this vendor, the contract will be referenced. When the PO is created from the requisition, a release will be created. When a user is approving a release PO, Maximo checks to see if sufficient funds are left to cover the total cost of the PO. If the contract has been defined with the property **Can Exceed Amount?** as True, Maximo warns the user that approving the PO will cause the committed costs to exceed the maximum value of the contract.

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Purchase Contracts continued

Blanket Contracts

continued

Blanket contracts can also be designated for specific items. In this type of contract, an overall amount is going to be spent on specific items or services (as well as non-catalog services or materials) over the next six months with a particular vendor. This contract might or might not have a commodity associated with it. However, there is a quantity and price associated with each line item. When one of the catalog services or items is entered on an MR or PR, the contract will be referenced. The line will default the correct price and quantity and a multiple of the contract quantity will be enforced. These requisitions will create a release PO against the contract.

When the contract is referenced on the PR header, users will be permitted to add only items/services (catalog or non-catalog) that are listed on the blanket contract.

Software License Contracts

A *software license* contract specifies the terms of the license agreement for computer software use, including named users, license keys, maintenance fees, and whether the software is transferable.

It is always assumed that the acquisition of software will occur outside of a software license as a purchase contract. Therefore, you will not be able to indicate any payment information in relation to a software license. In addition, the **Requires PO?** field on the Properties tab will not be editable. We will learn how to create a software license contract later in this chapter.

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Purchase Contracts continued

Software License Contract Types

The following table shows the seven types of software license contracts with the order unit and description for each.

Type	Order Unit	Description
Select	Points	A volume agreement to use within the organization. Suites use a points measure of distribution to the users.
Retail	Instances	Single, or limited multiuser licenses (similar to select).
Concurrent	Instances	A usage model that allows open distribution but is limited to a volume of concurrent license instances.
Enterprise	Instances	Right to unlimited use across organization (i.e., entitlement).
Named User	List of users	Limited to use by a named set of users. This license cannot be transferred to users not on the agreed list.
Subscription	Minutes	Online use of a licensed program based on authorized user logins.
OEM	Instances	Embedded licenses that come bundled with a computer. Usually these licenses are limited to use on the computer they came supplied on, and cannot be reused.

Standard Purchase Contracts

A *standard purchase* contract specifies the terms and conditions for a purchase. A contract is negotiated for specific items or services at an agreed-upon price with a vendor. A purchase order will be required for this order to occur, but no maximum spend is specified.

When these items or services are purchased, the quoted price will be defaulted to the MR, PR, or PO line. When the contract is referenced on the MR, PR, or PO header, the lines will be filtered to allow only the items/services that exist on the contract. Payment for these items will occur after they are received (standard processing).

The Purchase Contracts Application

Purchase Contracts Tabs

The Purchase Contracts application contains the following tabs:

Use this tab...	To...
List	Search Maximo for purchase contract records
Contract	Create, view, or modify purchase contract records
Properties	Enable or disable properties for the contract
Contract Lines	Create, view, modify, or delete line items listed on a contract
Terms and Conditions	Add, view, or delete terms and conditions that have been associated with the contract

The Properties Tab

You can set a variety of properties for the contract. Below are some of the options with their descriptions.

Option	Description
Requires PO?	Checking this box indicates that a purchase order is required for the contract.
Create Release?	Checking this box indicates that you can create a release from the contract.
Can Exceed Amount?	Checking this box indicates that you can exceed the specified maximum amount on this contract.
Payment Schedule?	Checking this box indicates that there is a defined payment schedule.
Add Lines on Use?	Checking this box indicates that you can add lines to the purchase document with contract reference.
Maintain Hierarchy?	Checking this box indicates that any hierarchy of which this contract is a part will be maintained.
Extendable?	Checking this box indicates that the contract is extendable.

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The Purchase Contracts Application continued

The Properties Tab continued

Option	Description
Conditions for Extension	Details any conditions that might exist for an extension.
Extension Period	If the contract is extendable, this field indicates the auto-extend period in days.
Acceptance Period	Amount of time in days that can pass before the buyer must either accept the received items or return them.
Acceptance Loss?	Checking this box indicates that you are liable for acceptance loss.
Shipping Loss?	Checking this box indicates that you are liable for shipping loss.
Vendor Termination Allowed?	Checking this box indicates that early termination by the vendor is allowed.
Vendor Notification Period	If the vendor allows early termination, this indicates the number of days' notice required.
Customer Termination Allowed?	Checking this box indicates that early termination by the customer is allowed.
Customer Notification Period	If the customer allows early termination, this indicates the number of days' notice required.

Creating a Purchase Contract

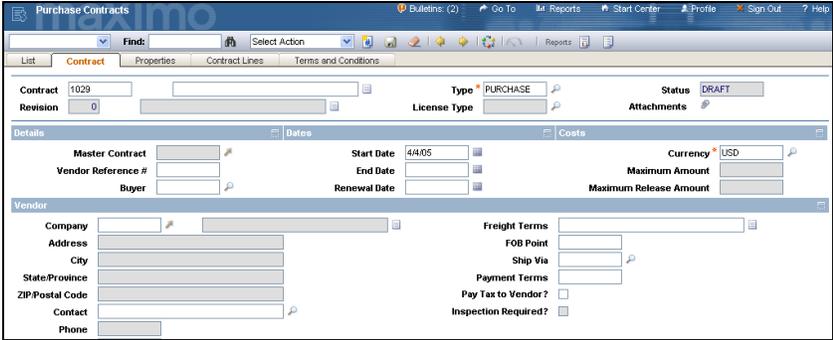
Introduction

In this section we will explore many of the aspects of the creation and setup of a purchasing contract by creating a purchase contract with the vendor we created in the last chapter.

Exercise: Creating a Purchase Contract



To create a purchase contract, complete the following steps.

Step	Action
1	Go to the Purchase Contracts application in the Contracts module.
2	<p>Click the New Purchase Contract icon .</p> <p><u>Result:</u> You are taken to the Contract tab, and the record is automatically numbered by default.</p> 
3	In the Vendor section of the screen, search for and select Vantarxx , the company we created earlier in the course.
4	Enter WINSTON in the Buyer field.
5	Use the Calendar icon  to select the End Date for the contract. Select one year from today's date.
6	Click on the Properties tab. For this exercise, we will keep the properties at their defaults. <u>Note:</u> Because the Requires PO? box is checked, a purchase order is required for this contract.
7	Save the record.

Authorizing Sites

Introduction

A contract cannot be approved until you specify a vendor, at least one authorized site, and a start date. We have specified a vendor and a start date for our contract. However, we still need to authorize a site or sites to use it. In this section we will authorize the Bedford site to use our newly created contract.

Exercise: Authorizing a Site to Use a Contract



To authorize a site to use a contract, complete the following steps.

Step	Action
1	<p>With the contract open, choose Authorize Sites from the Select Action menu.</p> <p><u>Result:</u> The Authorize Sites dialog box opens.</p> 
2	Click New Row .
3	Enter BEDFORD in the Site field.
4	<p>Click OK.</p> <p><u>Result:</u> Bedford is now authorized to use this contract.</p>

Adding Line Items

Introduction

Your company has negotiated this contract with Vantarxx for laptops and needs to reference them on a contract by adding specific line items to the contract you just created. In this exercise, we will add the line items to our newly created purchase contract.

Exercise: Adding Line Items to a Purchase Contract



To add line items to a purchase contract, complete the following steps.

Step	Action
1	With the contract open, click on the Contract Lines tab.
2	Click the Vendor Items button. <u>Result:</u> The Vendor Items screen opens with a list of all the items associated with the vendor. <div data-bbox="570 1056 1414 1304" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> </div>
3	Select the item listed.
4	Click OK and then Save .

Contract Statuses

Contract Statuses

Throughout the creation and life of a contract, you will need to change its status. You can do so by using the Change Status action or by performing tasks that trigger Workflow to move the contract forward through the status changes. When you create a contract, Maximo sets the status of the contract to DRAFT. As mentioned before, a contract cannot be approved until you specify a vendor, at least one authorized site, and a start date. The company and sites that you referenced on the contract must all be currently active.

The following table lists all the possible statuses for a contract, along with a description of each.

Status	Description
DRAFT	In this status everything can be edited (according to properties rules). This status can be changed to APPR, CLOSE, or CANCEL.
WAPPR (Waiting on Approval)	In this status everything can be edited (according to properties rules). This status can be changed to DRAFT, APPR, CLOSE, or CANCEL.
APPR (Approved)	In this status, only the status can be edited (back to DRAFT or WAPPR, or forward to CANCEL or CLOSE or to SUSPEND or EXPIRE).
PNDREV (Pending Revision)	This status is similar to DRAFT but only specified fields can be edited.
EXPIRE (Expired)	This status indicates that the end date for the contract has passed. Nothing on the contract can be edited in this status. A revision can be created against an expired contract. This status cannot be changed to any other status.

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Contract Statuses continued

**Contract
Statuses**

continued

Status	Description
SUSPND (Suspended)	In this status, nothing can be edited. This status can be changed to DRAFT, WAPPR, APPR, CANCEL, or CLOSE.
REVISED	In this status, nothing can be modified on the contract. This status cannot be changed to any other status.
WSTART (Waiting to Start)	Automatically changes to this status when the user chooses APPR and the start date is in the future. This status can be changed to APPR.
CANCEL	Nothing can be modified on the contract.
CLOSE	Nothing can be modified on the contract.

Terms and Conditions

Introduction

When a contract, purchase requisition, or purchase order is built, the applicable agreed-upon legal terms and conditions need to be associated with the document. These terms can be selected from the library of available clauses or can be added as free-form text to any purchasing document.

Terms and Conditions

The Terms and Conditions application is used to build the library of terms from which you can select to be applied to contracts, PRs, or POs. During setup, you can flag terms to always be included on a purchase order and indicate whether the end user can edit these values. Some terms can be created in a template format with specific information that requires the user to enter values.

Building a library of terms and conditions can help your organization standardize your business processes and enforce company policies.

Exercise Scenario

The goal of this scenario is to show you how to associate terms and conditions with an existing purchasing document.

Note: A contract must be in the status of DRAFT, WAPPR, or PNDREV in order to add terms and conditions to it.

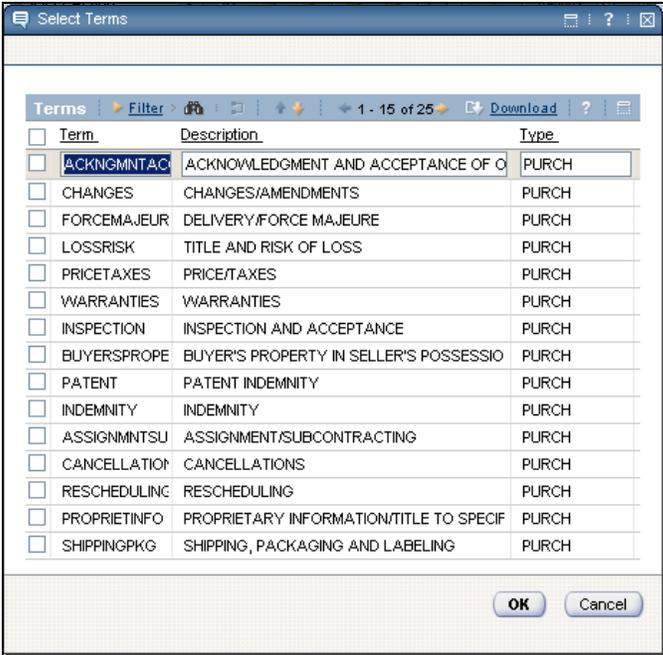
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Terms and Conditions continued

Exercise:
Associate Terms
and Conditions
to a Contract



To associate an existing term to a contract, complete the following steps.

Step	Action
1	In the contract we created in the previous exercise, select the Terms and Conditions tab.
2	<p>Click Select Terms.</p> <p><u>Note:</u> You can also click New Row if you want to add a term that is not part of the library.</p> <p><u>Result:</u> The Select Terms dialog box opens.</p> 
3	Select the check box next to WARRANTIES , then click OK .
4	<p>Save the record.</p> <p><u>Result:</u> The term is associated with the contract.</p>

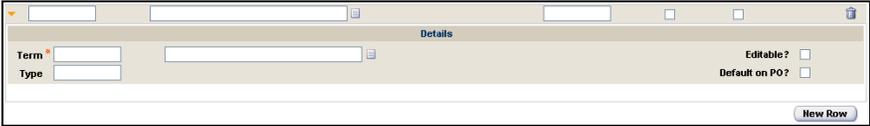
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Terms and Conditions continued

**Exercise:
Creating a Term
and Condition**



As mentioned earlier, you can create additional terms and conditions to apply to your contracts, PRs, and POs. In this exercise, we will create a term and condition and apply it to the contract.

Step	Action												
1	Go to the Terms and Conditions application in the Contracts module.												
2	With EAGLENA highlighted, click New Row . Result: The Details window opens. 												
3	Enter the following information: <table border="0"> <thead> <tr> <th><u>Field</u></th> <th><u>Value</u></th> </tr> </thead> <tbody> <tr> <td>Term</td> <td>VNTRTRLxx</td> </tr> <tr> <td>Description</td> <td>Vantar Title and Risk of Loss</td> </tr> <tr> <td>Editable?</td> <td>[<i>Checked</i>]</td> </tr> <tr> <td>Default on PO?</td> <td>[<i>Unchecked</i>]</td> </tr> <tr> <td>Long Description</td> <td>Title and Risk of Loss. Risk of Loss remains with the Company until the Title Transition Point. The Title Transition Point is defined as the point in time in which title of ownership passes from the Company to the Buyer. Should the Buyer elect to ship purchased goods on the Company's account, the Title Transition Point is the point in time at which the Buyer signs for delivery of the goods.</td> </tr> </tbody> </table>	<u>Field</u>	<u>Value</u>	Term	VNTRTRLxx	Description	Vantar Title and Risk of Loss	Editable?	[<i>Checked</i>]	Default on PO?	[<i>Unchecked</i>]	Long Description	Title and Risk of Loss. Risk of Loss remains with the Company until the Title Transition Point. The Title Transition Point is defined as the point in time in which title of ownership passes from the Company to the Buyer. Should the Buyer elect to ship purchased goods on the Company's account, the Title Transition Point is the point in time at which the Buyer signs for delivery of the goods.
<u>Field</u>	<u>Value</u>												
Term	VNTRTRLxx												
Description	Vantar Title and Risk of Loss												
Editable?	[<i>Checked</i>]												
Default on PO?	[<i>Unchecked</i>]												
Long Description	Title and Risk of Loss. Risk of Loss remains with the Company until the Title Transition Point. The Title Transition Point is defined as the point in time in which title of ownership passes from the Company to the Buyer. Should the Buyer elect to ship purchased goods on the Company's account, the Title Transition Point is the point in time at which the Buyer signs for delivery of the goods.												
4	Click OK , then Save the record.												
5	Go back to the Purchase Contracts application, and search for and select the contract you created earlier in this chapter.												
6	Associate the term and condition you just created with the contract.												

Canceling a Contract

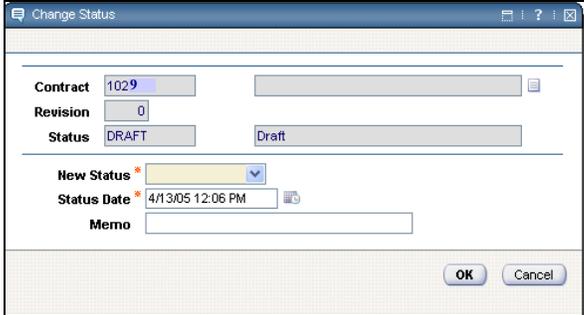
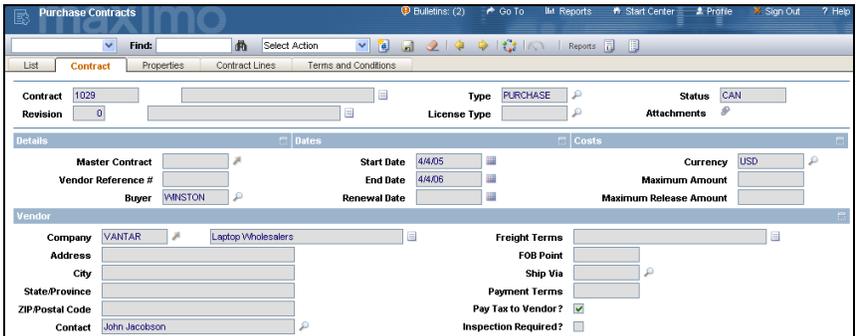
Canceling a Contract

There might be occasions when you want to cancel a contract. In this exercise we will cancel the purchase contract we created previously in this chapter.

Exercise: Canceling a Contract



To cancel a contract, complete the following steps.

Step	Action
1	<p>Open the contract you created earlier in this chapter, and click on the Change Status  icon.</p> <p><u>Result:</u> The Change Status dialog box opens.</p> 
2	<p>Select Canceled from the New Status drop-down list.</p>
3	<p>Click OK.</p> <p><u>Result:</u> The contract is canceled and all fields become read-only.</p> 

Creating a Software License Contract

Introduction

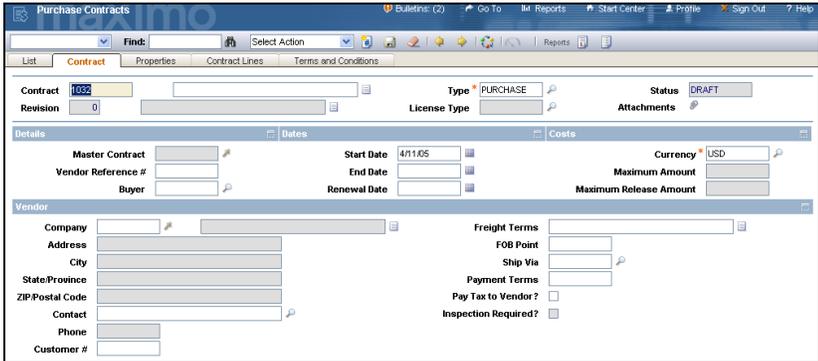
IT managers need to track software licenses that are distributed throughout their organization to make sure that overall utilization is within the agreed-upon contract. If licenses are under-utilized so savings can be recognized, over-utilization can result in the purchase of additional licenses to maintain contract compliance.

In this section, we will learn how to create a software license contract.

Exercise: Creating a Software License Contract



To create a software license contract, complete the following steps.

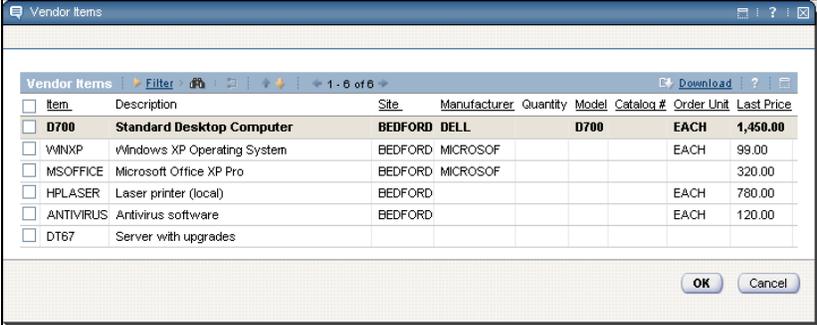
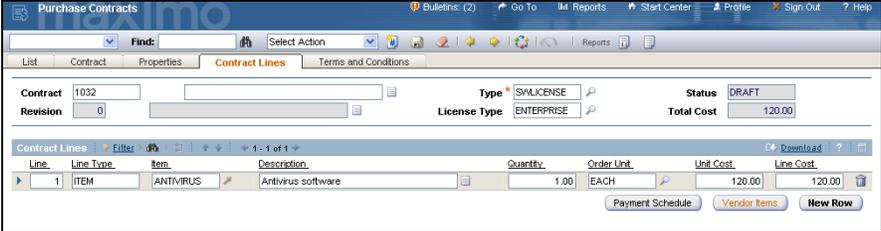
Step	Action
1	Go to the Purchase Contracts application in the Contracts module.
2	<p>Click on the New Purchase Contract  icon.</p> <p><u>Result:</u> You are taken to the Contract tab, and the record is automatically numbered by default.</p> 
3	Choose the type SWLICENSE from the Type field.
4	Choose ENTERPRISE from the License Type field.
5	Keep the Start Date at its default and enter 2 years from today's date as the End Date .

continued on next page

Creating a Software License Contract continued

Exercise:
Creating a
Software
License Contract

continued

Step	Action
6	Enter 1 year from today's date as the Renewal Date .
7	Enter COMPUSA in the Company field.
8	Click on the Contract Lines tab.
9	<p>Click the Vendor Items button.</p> <p><u>Result:</u> The Vendor Items dialog box opens.</p> 
10	<p>Select item ANTIVIRUS and click OK.</p> <p><u>Result:</u> The item is added to the contract.</p> 
11	Enter 120 in the Quantity field for the item.
12	Save the record.

Viewing and Editing Software License Properties

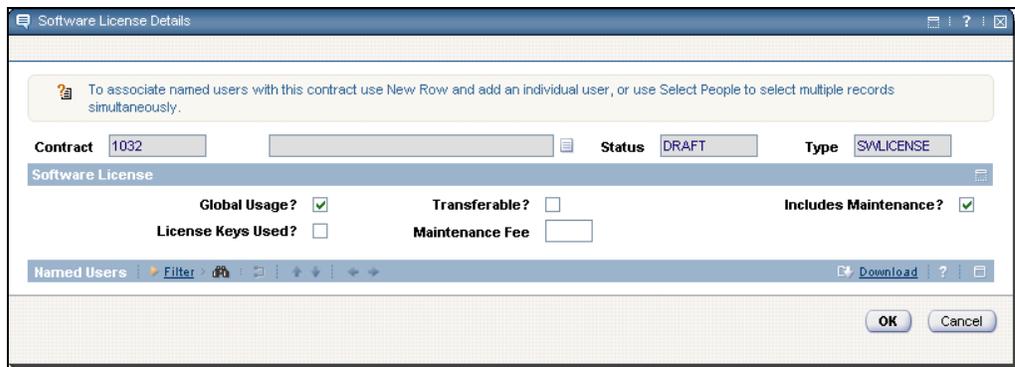
Introduction

After software license properties are captured for an organization, the tracking of actual usage and comparison to these contracts to ensure compliance becomes a much easier task for IT professionals.

You use the **Software License Details** action to view and edit software license details.

Software License Details Action

Select the Software License Details action to open the Software License Details dialog box.



The screenshot shows the 'Software License Details' dialog box. At the top, there is a message: 'To associate named users with this contract use New Row and add an individual user, or use Select People to select multiple records simultaneously.' Below this, there are input fields for 'Contract' (1032), 'Status' (DRAFT), and 'Type' (SMLICENSE). Under the 'Software License' section, there are four checkboxes: 'Global Usage?' (checked), 'License Keys Used?' (unchecked), 'Transferable?' (unchecked), and 'Includes Maintenance?' (checked). A 'Maintenance Fee' input field is also present. At the bottom, there is a 'Named Users' section with a 'Filter' button and a 'Download' button. 'OK' and 'Cancel' buttons are located at the bottom right.

Here you can set the available properties: **Global Usage?**, **License Keys Used?**, **Transferable?**, **Maintenance Fee**, and **Includes Maintenance?**.

If you had used NAMED USER as the license type, you would be able to specify a person or persons (using the New Row or Select People button).

You could then indicate the asset to which that person is assigned, the username for this software package. In addition, the status of the person, the person's supervisor, and the location would be displayed.

Lease/Rental Contracts

Introduction

In a world where technology changes overnight, it makes sense for IT departments to procure hardware via lease agreements instead of outright purchases. This way, the organization can achieve the balance of staying technologically current at the most efficient price point. A good business practice is to obtain the most current technology and return it at the end of the lease term so that newer equipment can be easily leveraged. The Maximo Lease/Rental Contracts application accommodates this requirement.

By storing contract documents electronically, you can take full advantage of the terms and conditions that have been agreed upon. These contracts can be easily entered using templates that capture critical lease or rental properties. You can then enforce these conditions internally, as well as more accurately monitor your vendors for contract compliance.

Lease/Rental Contracts

A lease/rental contract defines the overall terms and conditions of the agreement between a vendor and a customer regarding one or more rotating assets. A rotating asset is an asset that is interchangeable; for example, laptop computers. Rotating assets have both an asset number and an inventory item number. This lets you track the asset as it moves from an operating location to a storeroom and back to an operating location.

The details of the individual costs per asset are not provided until the customer receives the assets. Generally, the payment schedule details will be consolidated and provided on a monthly or quarterly basis. The details could include the total payment amount, payment period, total payments, lease rate factor, and individual payment amount. In addition, there could be detailed information about the costs associated with each individual asset that was delivered during that time period.

In order to capture these details within Maximo, you can create a master contract that details the vendor and terms and conditions that will be applied to every transaction. Every time a new payment schedule is received, you can either create a new lease contract under the master agreement with one or more lines of payment details, or add a new payment schedule line to an existing lease contract.

The Lease/Rental Contracts Application

Lease/Rental Contracts Application Tabs

The Lease/Rental Contracts application is in the Contracts module and contains six tabs: List, Contract, Properties, Contract Lines, Associated Assets, and Terms and Conditions. This section describes each tab.

List Tab

You use the List tab to search the database for a specific record or group of records that meet your criteria. You use the filter fields located above the List table window to enter basic search criteria.

Contract Tab

You use the Contract tab to add, view, or edit information specific to the contract and line-level editing rules. The Contract tab on a lease/rental type contract includes important payment-related information that Maximo uses when creating the payment schedule. Information on the Contract tab includes contract details, payment period, number of payments, lease rate factor, vendor information, and costs.

Some of the fields on the Contract tab are described in the following table.

Field	Description
Payment Period	This value indicates when the payment is due; for example, on the first of every month. The Set Schedule button next to the field takes you to a set schedule page where you can specify when payments will be made. This results in the field being populated with a string representing the selected schedule.
Lease Rate Factor	This value indicates the lease rate factor that will be applied to all of the schedules. The lease rate factor will be calculated as 1/Number of payments. The lease rate factor is multiplied by the cost of the contract to calculate the periodic payment amount.
Term in Months	This value indicates the overall term of the contract, or the length of time in months that an individual asset will be leased. This field must be filled in before the contract can be approved.
Number of Payments	This value indicates how many payments will be made during the term. For example, if the term is 24 months and the payment schedule is quarterly, the number of payments would be 8. This value is used to determine the estimated lease rate factor for the contract.

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The Lease/Rental Contracts Application continued

Properties Tab You use the Properties tab to enable or disable fields that pertain to an individual contract. The following table describes some of the fields on the Properties tab:

Field	Description
PO Required?	A purchase order is required when requesting items associated with a lease or rental contract.
Payment Schedule?	Checking this box indicates that there is a defined payment schedule.
Extendable?	Checking this box indicates that the contract is extendable.
Extension Period	If the contract is extendable, this field indicates the auto-extend period in days.
Conditions for Extension	Details any conditions that might exist for an extension.
Acceptance Loss?	Checking this box indicates that you are liable for acceptance loss.
Shipping Loss?	Checking this box indicates that you are liable for shipping loss.
Vendor Termination Allowed?	Checking this box indicates that early termination by the vendor is allowed.
Vendor Notification Period	If the vendor allows early termination, this indicates the number of days' notice required.
Customer Termination Allowed?	Checking this box indicates that early termination by the customer is allowed.
Customer Notification Period	If the customer allows early termination, this indicates the number of days' notice required.
Maintain Hierarchy?	Checking this box sets this field in the asset table to True when items are received off this contract.

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The Lease/Rental Contracts Application continued

Contract Lines Tab

On the Contract Lines tab you can optionally list rotating items that will be covered by the lease or rental. A rotating item can be listed only once on the Contract Lines page. When receipts occur for those rotating items and they are serialized, they are associated with an existing contract. You do not have to specify rotating item numbers here; you can instead specify the individual assets on the Associated Assets tab.

The lease end value and line cost are used as the default when any serialized assets from this rotating line are associated with the contract, either using the New Row button or at the time of receipt. The line cost associated with this rotating item will be used when this item is requisitioned or ordered. When these lines are received, the serialized assets that are created are automatically associated with the contract on the Associated Assets tab.

Associated Assets Tab

The Associated Assets tab contains a list of all locations or assets associated with a contract. In addition, it displays the asset's current location, user, custodian, and status. You can associate assets or locations manually using the New Row button, or add multiple records by using the Select Asset button. You can also determine whether an asset is currently associated with a payment schedule. If the asset is currently associated with a schedule, Maximo presents the Lease End date. If you order and receive items that are specified on the Contract Lines tab, the serialized assets are automatically associated with the contract.

Terms and Conditions Tab

The Terms and Conditions tab enables you to associate terms and conditions with a contract. These terms can contain information such as liability concerns, shipping and handling details, or delivery time expectations.

As we discussed in the Purchase Contracts section, you can add the terms and conditions from the library to a contract or create a term that applies only to the current contract. You can also modify those already listed in the library if they are indicated as editable.

Creating a Lease/Rental Contract

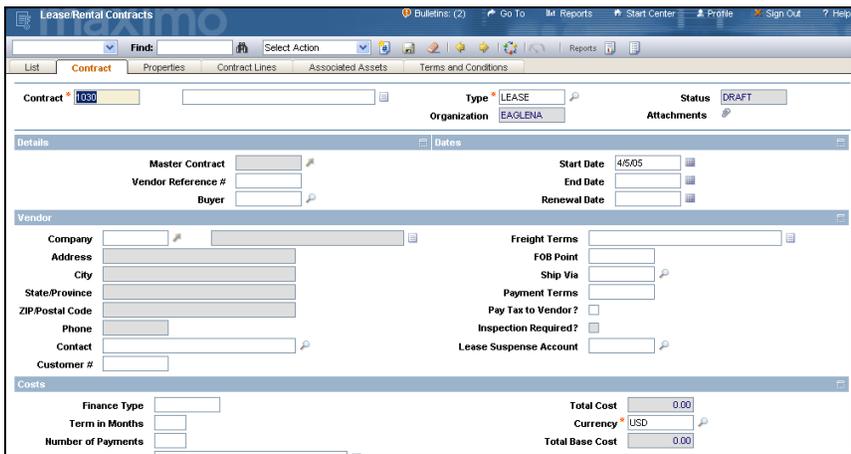
Exercise Scenario

In this scenario we will learn more about the setup and execution of the lease/rental contract. We will assume that you have decided to lease the laptops created in Chapter 2 from a different company. This contract has been negotiated and is now ready to be entered into Maximo as a new contract document.

Exercise: Creating a Lease Contract

To create a lease contract, complete the following steps.

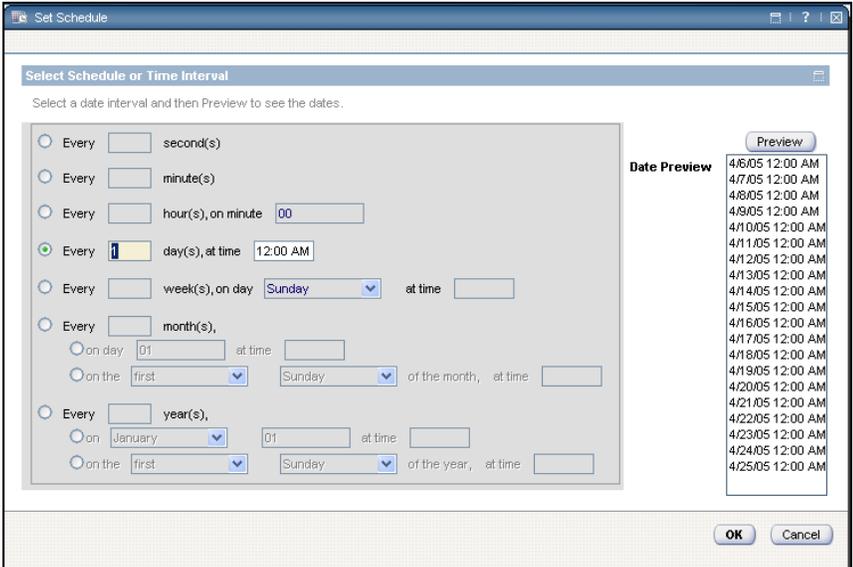


Step	Action
1	Go to the Lease/Rental Contracts application in the Contracts module.
2	<p>Click the New Lease/Rental Contract icon.</p> <p><u>Result:</u> You are taken to the Contract tab, and the record is automatically numbered by default. In addition, the contract type defaults to LEASE.</p> 

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Creating a Lease/Rental Contract continued

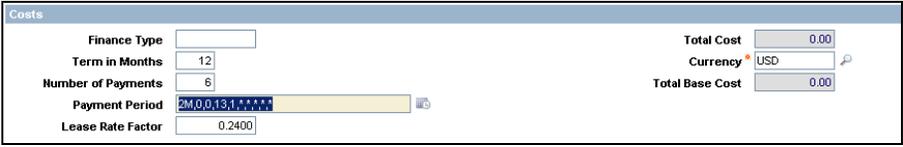
Exercise: continued
Creating a Lease Contract

Step	Action												
3	<p>Enter the following information:</p> <table border="0"> <thead> <tr> <th><u>Field</u></th> <th><u>Value</u></th> </tr> </thead> <tbody> <tr> <td>Company</td> <td>VANTARxx</td> </tr> <tr> <td>End Date</td> <td>[One year from today's date]</td> </tr> <tr> <td>Term in Months</td> <td>12</td> </tr> <tr> <td>Number of Payments</td> <td>6</td> </tr> <tr> <td>Lease Rate Factor</td> <td>.24</td> </tr> </tbody> </table> <p><u>Note:</u> The Lease Rate Factor is the lessor pre-determined percentage used to calculate the periodic payment, and is automatically populated based on the months and number of payments. However, you can change this value.</p>	<u>Field</u>	<u>Value</u>	Company	VANTARxx	End Date	[One year from today's date]	Term in Months	12	Number of Payments	6	Lease Rate Factor	.24
<u>Field</u>	<u>Value</u>												
Company	VANTARxx												
End Date	[One year from today's date]												
Term in Months	12												
Number of Payments	6												
Lease Rate Factor	.24												
4	<p>Click the Date Selector  icon next to the Payment Period field. <u>Result:</u> The Set Schedule screen opens.</p> 												

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Creating a Lease/Rental Contract continued

Exercise: continued
Creating a Lease Contract

Step	Action
5	Click on the Every ___ month option and enter 2 in the field after Every . Enter 1:00 PM in the at time field.
6	Click OK . <u>Result:</u> The Payment Period field is populated accordingly. 
7	Click on the Properties tab.
8	Check the Maintain Hierarchy? check box.
9	Save the contract.
10	Authorize BEDFORD and NASHUA to use the lease contract you just created.

continued on next page

Creating a Lease/Rental Contract continued

Adding Line Items

When you negotiate a lease/rental contract, the specific items that will be provided by the vendor are agreed upon. Only rotating items can be associated with a lease/rental contract. These will be rotating items that, when ordered, will reference the contracted pricing and terms. Optionally, you are not required to list items on the contract and might decide to add only the specific assets.

Adding line items to a lease contract is the same as adding line items to a purchase contract. The contract must have the status of DRAFT, WAPPR, or PNDREV in order to add line items.

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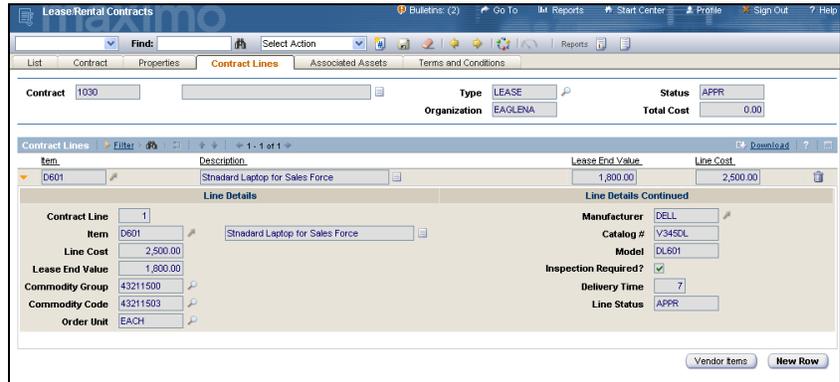
Creating a Lease/Rental Contract continued

**Exercise:
Adding Line
Items**



Add the following line items to the lease contract you just created.

Step	Action																
1	With the Lease/Rental Contracts application open to the contract we just created, click on the Contract Lines tab.																
2	Click the Vendor Items button to choose item D601 . Click OK .																
3	Click the View Details button and enter the following information: <table border="0"> <thead> <tr> <th><u>Field</u></th> <th><u>Value</u></th> </tr> </thead> <tbody> <tr> <td>Manufacturer</td> <td>Dell Computer</td> </tr> <tr> <td>Catalog #</td> <td>V345DL</td> </tr> <tr> <td>Model</td> <td>DL601</td> </tr> <tr> <td>Line Cost</td> <td>2500</td> </tr> <tr> <td>Lease End Value</td> <td>1800</td> </tr> <tr> <td>Inspection Required?</td> <td>[<i>Checked</i>]</td> </tr> <tr> <td>Delivery Time</td> <td>7 (<u>Note</u>: This indicates 7 days)</td> </tr> </tbody> </table>	<u>Field</u>	<u>Value</u>	Manufacturer	Dell Computer	Catalog #	V345DL	Model	DL601	Line Cost	2500	Lease End Value	1800	Inspection Required?	[<i>Checked</i>]	Delivery Time	7 (<u>Note</u> : This indicates 7 days)
<u>Field</u>	<u>Value</u>																
Manufacturer	Dell Computer																
Catalog #	V345DL																
Model	DL601																
Line Cost	2500																
Lease End Value	1800																
Inspection Required?	[<i>Checked</i>]																
Delivery Time	7 (<u>Note</u> : This indicates 7 days)																
4	Save the record.																
5	Change the status of the contract to APPROVED . <u>Result</u> : The status is changed and all fields become read-only.																



Warranty Contracts

Introduction

When any asset is purchased, it is critical that details regarding the asset's warranty are captured. In addition, it is important that the asset management system recognize warranty conditions as work or configuration change is defined. If the asset has failed in some respect, then compensation of replacement is a possibility for the organization. For this reason, control of the warranty conditions, as well as details surrounding the activity performed and the costs incurred, is critical to realizing the greatest value from the vendor's or manufacturer's warranty certification.

Maximo accommodates all of these warranty-related requirements through the Warranty Contracts application, as well as through the customary Service Desk and work management applications. This scenario deals with the purchasing agent's procurement of assets and the creation of a warranty contract, as well as an illustration of its practical use.

You use a warranty or service contract to maintain one or more assets with an outside service provider for a fixed fee, or regularly scheduled payment over a time period, or to track warranty information for multiple assets or locations by time or meter. There are two types of warranty contracts: warranty and service.

The Warranty Contracts Application

The Warranty Contracts Application

The Warranty Contracts application has the same tabs as the Lease/Rental Contracts application. However, as you would expect, some of the information supplied on them is different. Some of the differences are described in the following sections.

Properties Tab

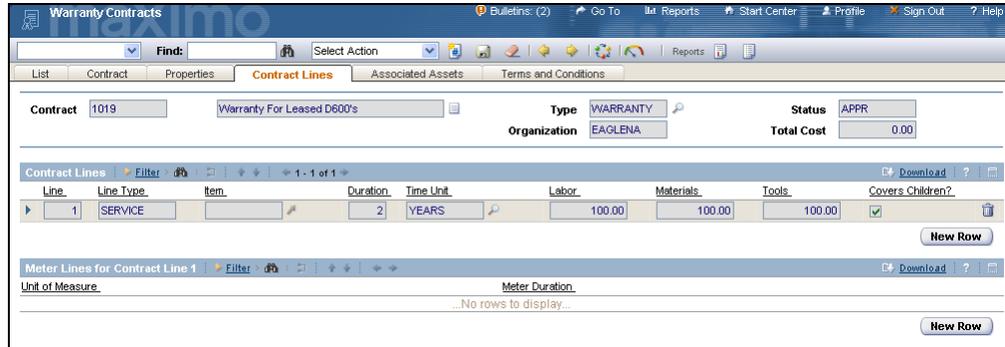
The following table describes some of the fields on the Properties tab:

Field	Description
Extendable?	Checking this box indicates that the contract is extendable.
Condition for Extension	Details any conditions that might exist for an extension.
Extension Period	If the contract is extendable, this field indicates the auto-extend period in days.
Vendor Termination Allowed?	Checking this box indicates that early termination by the vendor is allowed.
Vendor Notification Period	If early termination is allowed by vendor, this indicates the number of days notice required
Customer Termination Allowed?	Checking this box indicates that early termination by the customer is allowed.
Customer Notification Period	If the customer allows early termination, this field indicates the number of days' notice required.
Payment Schedule?	Checking this box indicates that you can create a payment schedule for this contract.
Process Claim?	Checking this box indicates that a claim can be processed against this contract.

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The Warranty Contracts Application continued

Contract Lines Tab



The Contract Lines tab has two table windows: a list of lines and a list of meters. When a line is selected in the top table window, all meters associated with that line are displayed in the bottom window. The **New Row** button allows you to define a new coverage line for warranty type contracts. When you insert a new row, the next sequential number defaults to the line. You can edit this field, but it must be unique. The **Line Type** defaults to **SERVICE**, but you can also choose to specify a standard service line type.

Coverage Percent	
Labor	100.00
Materials	100.00
Tools	100.00

There are three values for the **Coverage Percent** and **Coverage Amount**: **Labor**, **Materials** and **Tools**. The Coverage Percent and Coverage Amount are numeric free-form fields. The coverage % for Materials, Labor, and Tools defaults to 100% when you insert a new row and cannot be anything greater than 100%. In addition, it must be a positive number.

The **Covers Children?** check box, when checked, indicates that when this coverage line is associated with an asset or location, the children of that record will be covered as well.

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The Warranty Contracts Application continued

Contract Lines Tab

continued

Warranties are generally free of charge and specify coverage information for an asset. Extended warranty contracts describe a time- or meter-based coverage, but also incur a cost. This type of contract would have a payment schedule created against it with either a one-time payment or a recurring payment.

Unit of Measure	Meter Duration
...No rows to display...	

The second table window, **Meter Lines for Contract Line**, displays the meter-related coverage information associated to the coverage line selected in the top table window. The fields displayed here are **Unit of Measure** and **Meter Duration**.

Associated Assets

Asset	Asset Description	Location	Location Description	Asset Type
7111	Standard Laptop Computer			
7112	Standard Laptop Computer			
7113	Standard Laptop Computer			
7114	Standard Laptop Computer			
7115	Standard Laptop Computer			

Line	Description	Duration	Time Unit	Start Date	End Date	Covers Children?
1	D600 Notebooks	2	YEARS	12/1/04	12/1/06	<input checked="" type="checkbox"/>

Meter	Duration	Unit of Measure	Start Reading	End Reading	Last Reading	Last Reading Date
...No rows to display...						

The Associated Assets tab, as in the Lease/Rental Contracts application, lists all the locations or assets that are associated with a contract and the asset's current location, user, custodian, and status.

Associating Assets with a Warranty Contract

Introduction

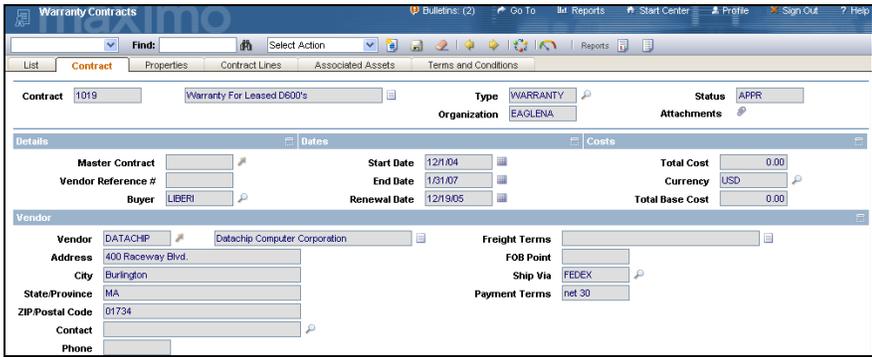
Because we have created several types of contracts in this unit, and creating a warranty contract is similar, we will not create a warranty contract; however, we will select assets for which we want to apply an existing warranty contract. In addition, we will define time duration and time coverage.

In order to associate an asset with a warranty contract, the contract must have a status of Approved.

Exercise: Selecting Assets for a Warranty Contract



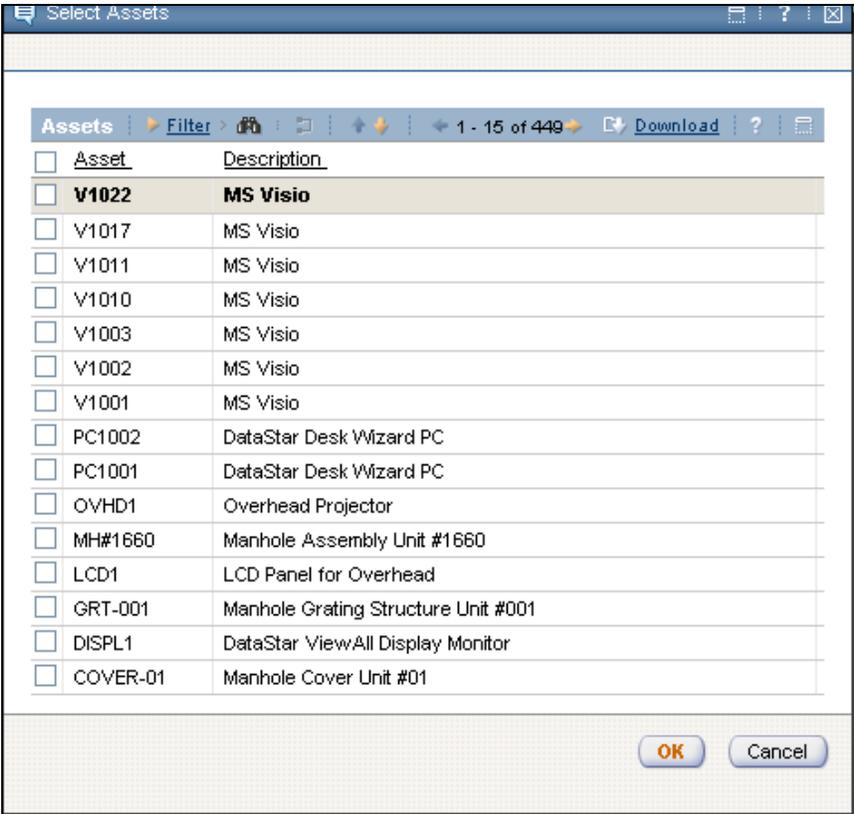
To associate assets with a warranty contract, complete the following steps.

Step	Action
1	Go to the Warranty Contracts application.
2	Search for all warranty contracts for the vendor DATACHIP .
3	<p>Select contract 1019.</p> <p><u>Result:</u> You are taken to the Contract tab and can view the information pertaining to the contract.</p> 
4	Click on the Associated Assets tab.

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Associating Assets with a Warranty Contract continued

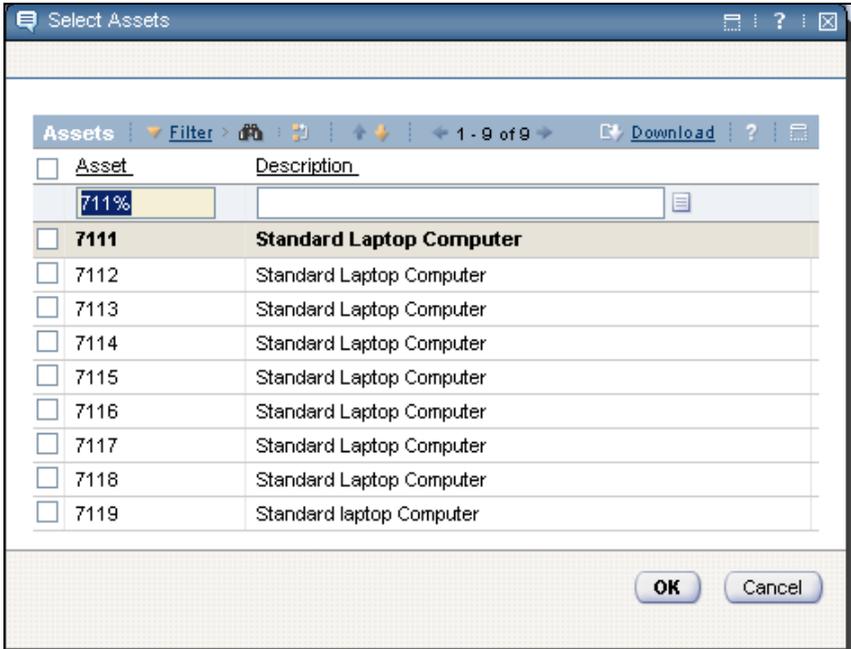
Exercise: continued
Selecting Assets
for a Warranty
Contract

Step	Action
5	<p>Click the Select Assets button. <u>Result:</u> The Select Assets dialog box opens.</p> 

continued on next page

Associating Assets with a Warranty Contract continued

Exercise: continued
Selecting Assets for a Warranty Contract

Step	Action
6	<p>Click on Filter, enter 711% in the Filter field, and click the Filter Table  icon.</p> <p><u>Result:</u> The results are filtered according to the criteria you entered.</p>  <p>The screenshot shows a window titled "Select Assets" with a toolbar containing "Assets", "Filter", and "Download". Below the toolbar is a table with columns "Asset" and "Description". The "Filter" field above the table contains "711%". The table lists assets 7111 through 7119, all with the description "Standard Laptop Computer". Asset 7111 is highlighted in a darker row. At the bottom right of the window are "OK" and "Cancel" buttons.</p>
7	Select Assets 7116 and 7117 .
8	<p>Click OK.</p> <p><u>Result:</u> The Select Assets screen closes and the assets you selected are added to the Associated Assets tab.</p>
9	Enter today's date as the Start Date for both assets.
10	Save the record.

Chapter Summary

Purchase Contracts

The four types of purchase contracts available when you first purchase Maximo are price, blanket, software license, and standard purchase.

Price agreement contracts outline the prices to be paid for specific items purchased from a specific vendor. A *blanket* contract is one that outlines the overall amount to be spent with a specified vendor over a particular time period. A *software license* contract outlines the terms of the license agreement for computer software use. A *standard purchase* contract outlines the terms and conditions for a purchase.

You cannot use a contract unless you first authorize a site to use it.

Terms and Conditions

You can create your own terms and conditions, or use those that exist in a library.

In order to add terms and conditions to a contract, it must be in the status of DRAFT, WAPPR, or PNDREV.

Lease/Rental Contracts

A lease/rental contract outlines the overall terms and conditions of the agreement between a vendor and a customer regarding one or more rotating assets.

A rotating item can be listed only once on the Contract Lines tab.

Warranty Contracts

A warranty contract must be approved before you can associate assets to it.

Workshop

Exercise 1



Create a lease/rental contract with the following information:

<u>Field</u>	<u>Value</u>
Company	MULTI
End Date	[<i>One year from today's date</i>]
Term in Months	12
Number of Payments	6
Payment Period	Every 2 months at 9AM
Lease Rate Factor	.24
Maintain Hierarchy?	Yes (on the Properties tab)

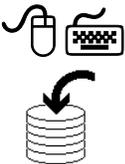
Keep the rest of the fields at their defaults.

Authorize a site to use this contract.

We will not associate any line items with the contract at this time.

Write the contract number here _____.

Exercise 2



Cancel the lease contract you created earlier in this chapter.

Review Questions

Review Questions

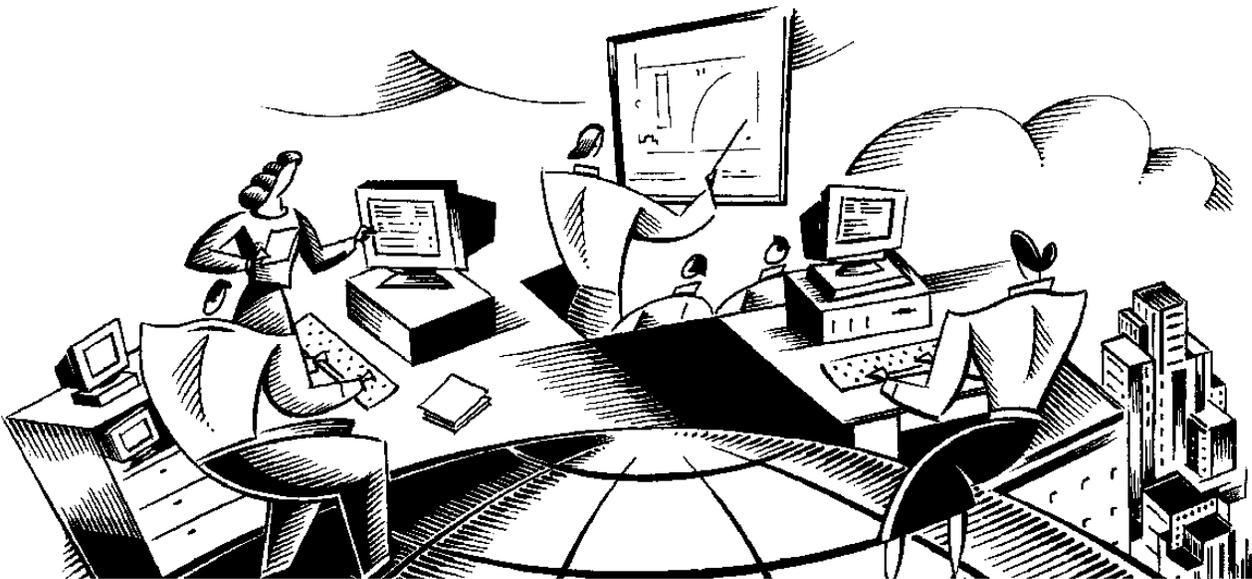


1. Do you have to specify a vendor on a contract? What happens if you don't?

 2. What is the Lease Rate Factor on a lease/rental contract?
-

IT Asset Configuration and Management in MXES

Unit 3: Acquisition



In This Unit

This unit contains the following chapters:

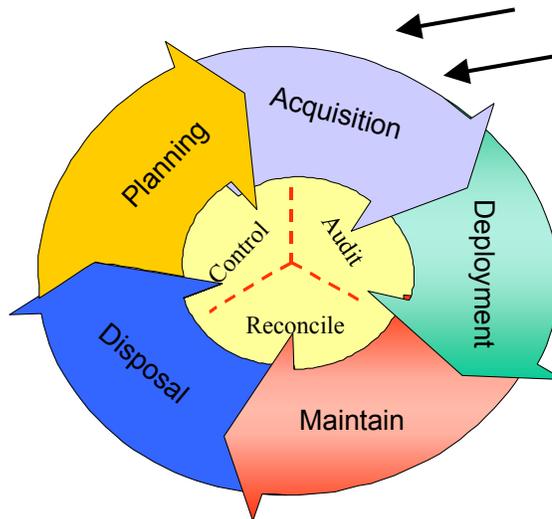
Chapter	Subject
5	Requisitions
6	Request for Quotations

Unit Purpose

The purpose of this unit is to provide you with instruction on how Maximo supports the acquisition phase in asset configuration and management.

Acquiring and the IT Lifecycle

Acquiring and the IT Lifecycle



We went through the planning phase in the previous unit, and we are now ready for the second phase: acquiring assets.

Acquiring

It is important that you carry out procurement processes to ensure that acquisition and outsourcing maximize the potential of your asset strategy. Maximo allows you to gain control over and centralize the requisition and procurement of IT assets so that you can take advantage of centrally negotiated contracts. ITIL and other standards suggest that you have policies and standards in place for purchasing new assets, and a documented process for receiving assets. Maximo makes this relatively easy to do.

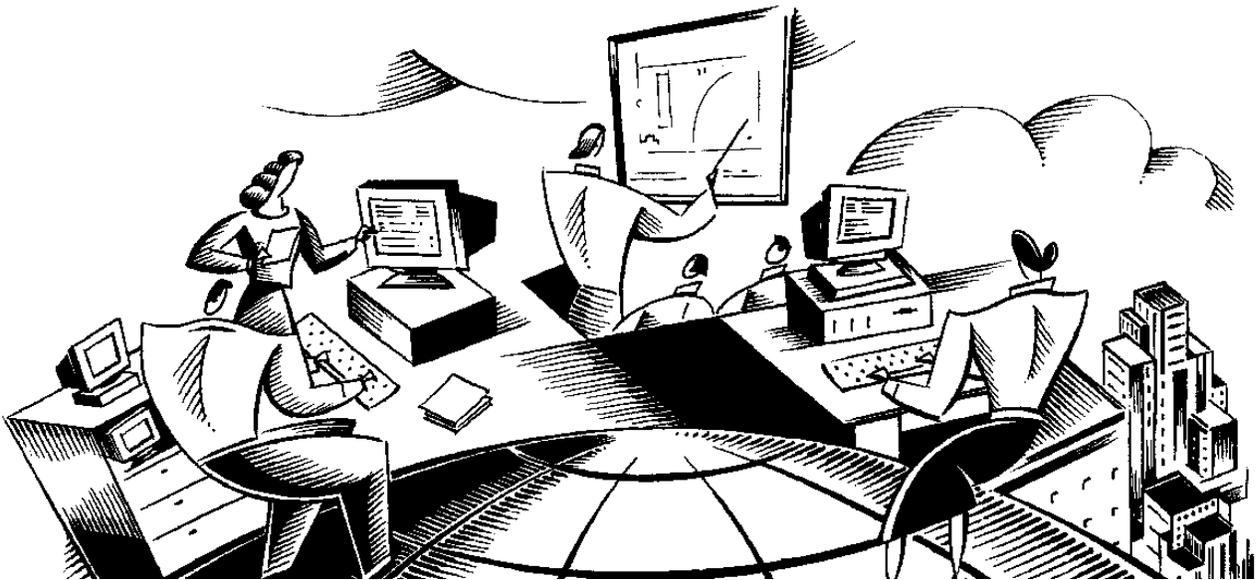
Unit Scenario

Scenario

In this unit we will continue with the previous unit's scenario in which you chose the laptop you would buy, decided on a vendor, and applied a contract to the laptop. For this unit, we will create a requisition for the laptop and create a request for quotation so that we can be sure we are getting the best deal possible on our purchase.

IT Asset Configuration and Management in MXES

Chapter 5: Requisitions



In This Chapter

This chapter contains the following topics:

Topic	See Page
Chapter Overview	5-1
Desktop Requisitions	5-2
Creating a Requisition via Create Requisitions	5-3
The Purchase Requisitions Application	5-8
Creating a PR via Purchase Requisitions	5-11
Chapter Summary	5-14
Workshop	5-15
Review Questions	5-16

Chapter Overview

Introduction

A *purchase requisition* (PR) is a written request issued internally to a purchasing department to order items or services.

A PR is created in one of the following ways:

- Reordering for a storeroom replenishment or direct issue using the Reordering action in the Inventory application
 - Requisitioning for materials and services using the Create Requisition application
 - Using the Purchase Requisitions application
-

Chapter Focus

In this chapter, we will focus on creating PRs using the Create Requisition and Purchase Requisitions applications.

Learning Objectives

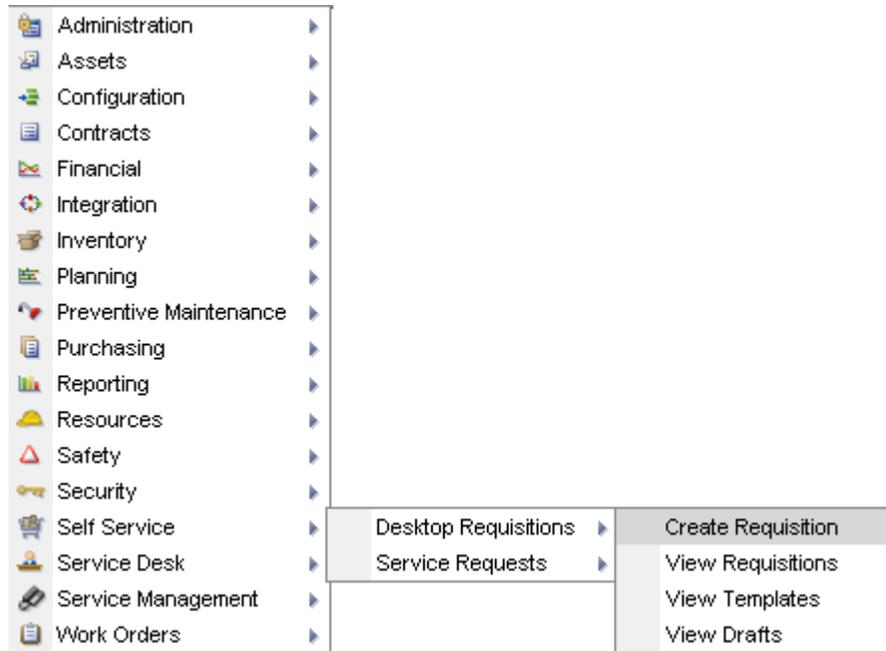
When you have completed this chapter, you should be able to:

- create a purchase requisition using the Create Requisition application, and
 - create a purchase requisition using the Purchase Requisitions application
-

Desktop Requisitions

Introduction

Desktop Requisitions is a submodule of the Self Service module. You use the applications in Desktop Requisitions to quickly and easily handle your requisitioning needs. These applications are designed to be used by both experienced and novice users.



Desktop Requisitions Applications

There are four applications in the Desktop Requisitions submodule:

Use this application...	To...
Create Requisition	Search for and order the items and services you need
View Requisitions	View your open requisitions, edit your requisitions, and check the status of an order
View Templates	View your template requisitions, and use them to create new requisitions with similar information
View Drafts	View your draft requisitions, and complete them if you want

Creating a Requisition via Create Requisitions

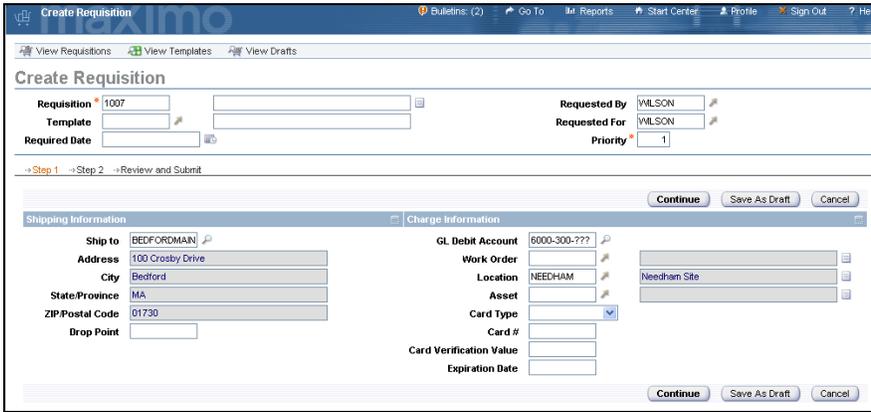
Introduction

In this exercise we will create a requisition for the laptop we created in the Chapter 2 (D601xx).

Exercise: Creating a Requisition via Create Requisitions



To create a requisition with the Create Requisition application, complete the following steps.

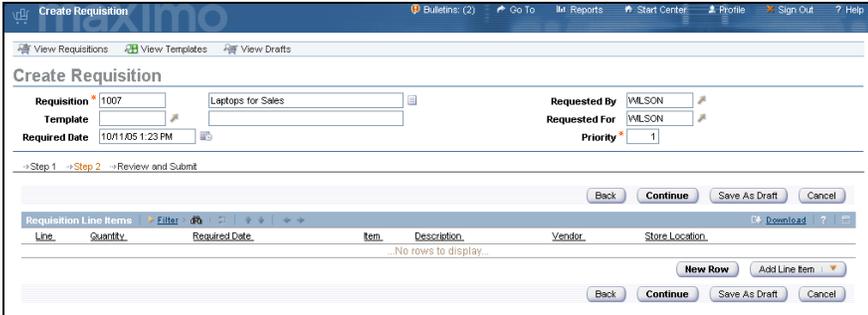
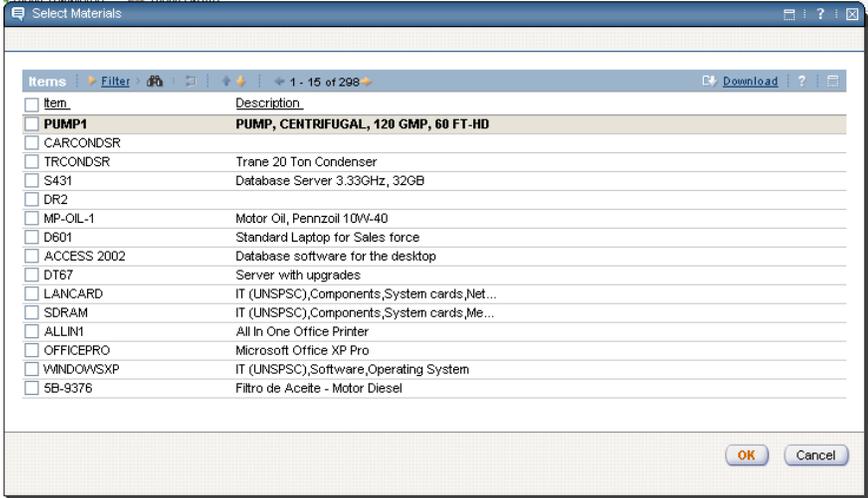
Step	Action
1	<p>Go to the Create Requisition application from Self Service/Desktop Requisitions.</p> <p><u>Result:</u> The Create Requisition application opens to a new requisition form. The record is automatically numbered by default, although you can change the number if you want.</p>  <p><u>Note:</u> You could use the Template field if you wanted to apply a previously created PR template to this record, but we will not do so in this exercise.</p>
2	Enter Laptops for Sales in the Description field.
3	We need the laptops 6 weeks from now, so enter 6 weeks from today's date in the Required Date field.

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Creating a Requisition via Create Requisitions continued

Exercise:
Creating a
Requisition via
Create
Requisitions

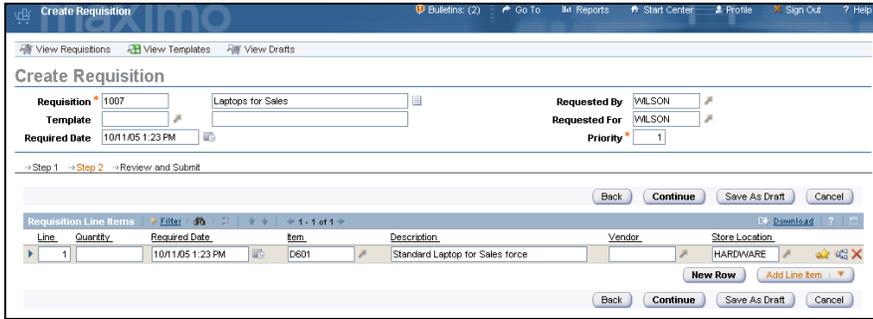
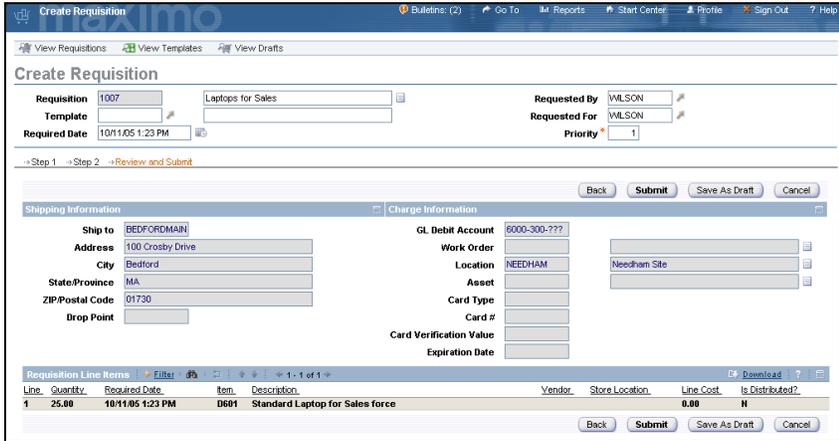
continued

Step	Action
4	<p>For this exercise we will not enter any of the charge information, so click Continue.</p> <p><u>Result:</u> You are taken to the next page of information.</p> 
5	<p>Click Add Line Item, then choose Select Materials from the drop-down menu.</p> <p><u>Result:</u> The Select Materials dialog box opens.</p> 

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Creating a Requisition via Create Requisitions continued

Exercise: continued
Creating a Requisition via Create Requisitions

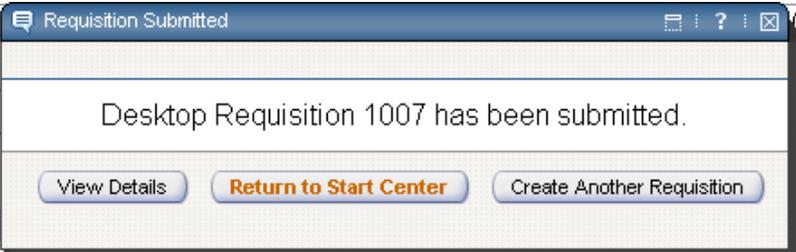
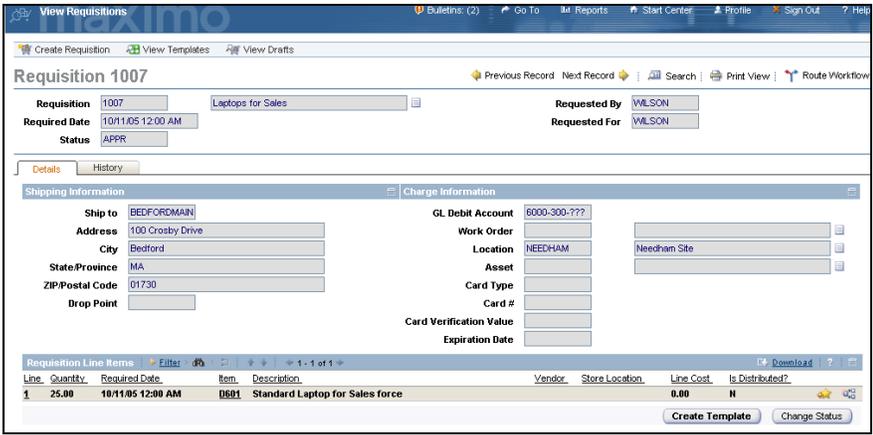
Step	Action
6	Select the item you created in Chapter 2: D601xx
7	<p>Click OK. <u>Result:</u> The item is added to the PR.</p> 
8	<p>Enter 25 in the Quantity field, and if the Store Location field is populated, clear it. <u>Note:</u> If you enter a location in the Store Location field, a reservation—<i>NOT</i> a PR—will be created.</p>
9	<p>Click Continue. <u>Result:</u> The requisition appears with all of the information thus far.</p> 

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Creating a Requisition via Create Requisitions continued

Exercise:
Creating a
Requisition via
Create
Requisitions

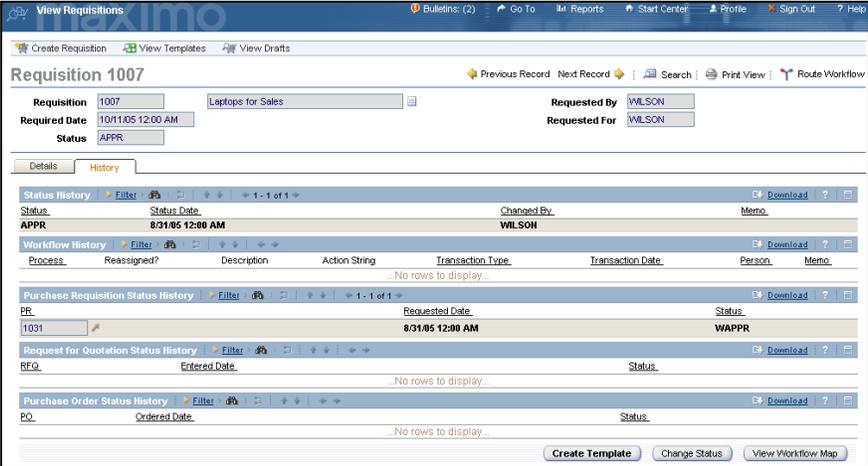
continued

Step	Action
10	<p>Click Submit. <u>Result:</u> The confirmation dialog box opens.</p> 
11	<p>Click View Details. <u>Result:</u> You are taken to the Details tab.</p> 

continued on next page

Creating a Requisition via Create Requisitions continued

Exercise: continued
Creating a Requisition via Create Requisitions

Step	Action
12	<p>Click the History subtab. <u>Result:</u> Maximo displays the various actions that have been taken on this PR.</p> 
13	<p>Look in the Purchase Requisition Status History section of the screen and write down your PR number here: _____. We will use it in the next exercise.</p>

The Purchase Requisitions Application

Introduction

As mentioned, before there are three ways to create purchase requisitions. In the previous section we looked at the Create Requisition application. In this section we will focus on the Purchase Requisitions application.

Purchase Requisitions Application

The **Purchase Requisitions** application is in the Purchasing module. Like the Create Requisition application, Purchase Requisitions is used to create purchase requisitions for items, supplies, and services.

You can create external PRs, which request the purchase of materials from an outside vendor. In addition, Maximo allows you to create internal PRs, which request the transfer of materials from one storeroom to another within the same company.

The Purchase Requisitions application has five tabs:

Use this tab...	To...
List	Search the database using any combination of available fields.
PR	Enter, view, or modify purchase requisitions.
PR Lines	Enter, view, or modify line items for a purchase requisition. A line can be an item from inventory, a material not from inventory, or a service.
Ship To/Bill To	Specify shipping information that will be used as a default on each PR line, and billing information for the entire order.
Terms and Conditions	View terms associated with the PR. You can add new terms from the library or create new terms that will be saved to the PR, but not to the library.

continued on next page

The Purchase Requisitions Application continued

PR Statuses

When you first create a PR, it automatically has the status of **WAPPR**, Waiting on Approval. A PR can also have three other statuses:

- **Approved (APPR)**. The default Maximo configuration does not require approvals for PRs and PR line items that you transfer to POs. However, this status is available if your business rules require approvals.
 - **Closed (CLOSE)**. This status indicates that all the PR's line items have been assigned to one or more purchase orders. When the PR is in this status, all fields are read-only and the record can no longer be modified. If you try to close a PR and a line item has not yet been assigned, Maximo displays a message. Your system administrator can set Maximo to automatically close PRs after you transfer all the line items to POs, RFQs, or contracts.
 - **Canceled (CAN)**. This status is available if the current PR status is Approved (APPR) and none of its line items have been assigned to a purchase order. When the PR is in this status, all fields are read-only and the record can no longer be modified.
-

PR Line Items

When you create a purchase requisition, you list each item, material, or service to be purchased on a separate line on the **PR Lines** tab. After the purchase requisition has been approved, you can assign its line items to one or more purchase orders. A purchase requisition can be closed after all its line items are assigned to a purchase order. A single purchase requisition can list items or services for several vendors, as vendors do not have to be specified on a PR.

continued on next page

The Purchase Requisitions Application continued

Viewing a PR

Let's take a look at the PR we created in the previous exercise by completing the following steps.

Step	Action
1	Go to the Purchase Requisitions application in the Purchasing module.
2	Search for and select the PR you created in the previous exercise. <u>Result:</u> You are taken to the PR tab. <div data-bbox="496 701 1380 1163" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>The screenshot shows the 'Purchase Requisitions' application window. The 'PR' field contains '1012' and the 'Site' is 'BEDFORD'. The 'Status' is 'WAPPR'. The 'Details' tab is active, showing fields for Priority (1), Requested By (WILSON), Supervisor, Contract Reference, Contract Type, and Contract Revision. The 'Dates' section shows Status Date (4/11/05 12:00 AM), Requested Date (4/11/05 12:00 AM), and Required Date (5/23/05 12:00 AM). The 'Costs' section shows Pretax Total (0.00), Total Tax (0.00), Total Cost (0.00), Currency (USD), and Total Base Cost (0.00). The 'Vendor' section includes fields for No Vendor?, Company, Address, City, State/Province, ZIP/Postal Code, Contact, Customer #, and Phone, along with checkboxes for Internal?, Pay Tax to Vendor?, Pay on Receipt?, and Inspection Required?.</p> </div>
3	Click on the various tabs, taking note of the information that each contains.

Creating a PR via Purchase Requisitions

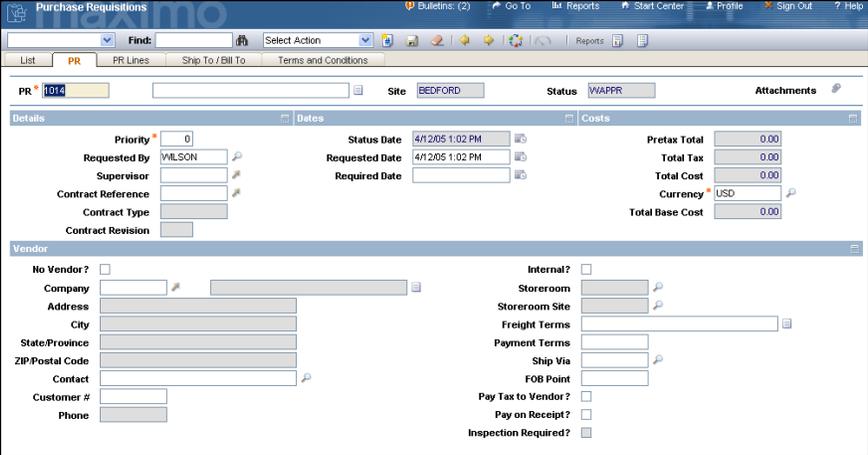
Introduction

As discussed previously, you can also create a PR in the Purchase Requisitions application. In this exercise, we will create a PR and approve it.

Exercise: Creating a Requisition via Purchase Requisitions



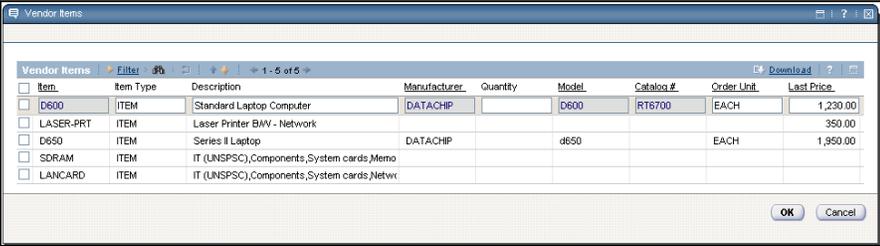
To create a purchase requisition, complete the following steps.

Step	Action
1	Go to the Purchase Requisitions application.
2	<p>Click the New Purchase Requisition icon.</p> <p><u>Result:</u> A new requisition is created and is automatically numbered, although you can change the number if you want.</p> 
3	Enter Laptops for New Business Solution Managers in the Description field.

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Creating a PR via Purchase Requisitions continued

Exercise: continued
Creating a Requisition via Purchase Requisitions

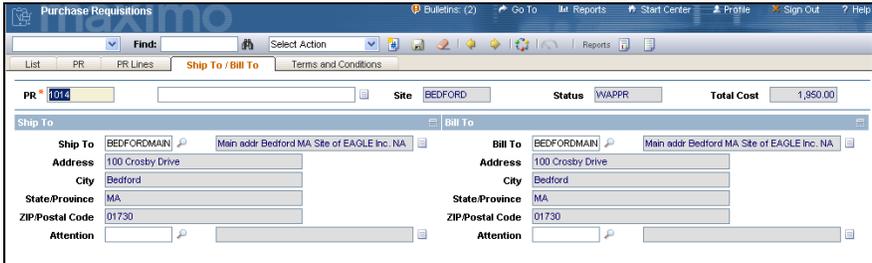
Step	Action
<p>4</p> 	<p>Enter 4 in the Priority field.</p> <p><u>Note:</u> The priority level is used to determine the order in which requisitions should be turned into purchase orders. We recommend that you limit your range of values from 0 to 9, where 0 is the lowest priority. The default value is 0.</p>
<p>5</p> 	<p>Enter 1014 in the Contract Reference field.</p> <p><u>Result:</u> The Vendor information is automatically populated.</p> <p><u>Note:</u> Contract Reference allows you to take advantage of prearranged pricing with a specific vendor. Referencing a contract will automatically populate the Vendor information.</p> <p>If you did not enter a contract reference and you wanted to make this an internal PR, you would enter a storeroom in the Company field (as long as the storeroom record has the Use on PR/PO? check box checked).</p>
<p>6</p>	<p>Click on the PR Lines tab.</p>
<p>7</p>	<p>Click on the Vendor Items button.</p> <p><u>Result:</u> The Vendor Items dialog box opens with a list of items supplied by the vendor associated with the PR.</p> 
<p>8</p>	<p>Select item D650 and then click OK.</p> <p><u>Result:</u> The line item is added to the PR.</p>

continued on next page

Creating a PR via Purchase Requisitions continued

**Exercise:
Creating a
Requisition via
Purchase
Requisitions**

continued

Step	Action
<p>9</p> 	<p>Expand the Line Item and enter 1 in the Conversion Factor field. <u>Note:</u> The conversion factor is used to convert the order unit to the issue unit, and vice versa. If you specify an order unit in the Order Unit field, Maximo enters the corresponding conversion value in this field. If you have not specified an order unit, Maximo sets the conversion factor to 1.00, indicating that the order unit is the same as the issue unit. To determine a conversion factor, divide the order quantity by the issue quantity. You can edit this field if the line item is not a service. For service line items, this field is read-only and always set to 1.00.</p>
<p>10</p>	<p>Click on the Ship To/Bill To tab. <u>Result:</u> Maximo displays the Ship To/Bill To tab. In this case, the system administrator has set some fields to show these default values.</p> 
<p>11</p>	<p>Save the record.</p>

Chapter Summary

Purchase Requisitions

A *purchase requisition* (PR) is a written request issued internally to a purchasing department to order items or services.

You can create a PR by reordering for a storeroom replenishment or direct issue through the Inventory application, or requisitioning for materials and services through the Create Requisitions or Purchase Requisition applications.

After a purchase requisition has been approved, you can assign its line items to one or more purchase orders. A purchase requisition can be closed after all of its line items are assigned to a purchase order. A single purchase requisition can list items or services for several vendors, because vendors do not have to be specified on a PR.

Create Requisition Application

You use the Create Requisition application to create and submit a purchase requisition. The requisition contains the requisition description, shipping information, charge information, and requisition lines.

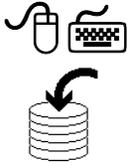
Purchase Requisitions Application

You use the Purchase Requisitions application to create purchase requisitions for items, supplies, and services.

Maximo allows you to create both internal and external PRs.

Workshop

Exercise



In this exercise we will create a PR for the item we created in the workshop for Chapter 2 (S341).

Step	Action
1	Use the Create Requisition application in the Desktop Requisitions module to create a PR for item S341 . Use the following specifications: <ul style="list-style-type: none">• Order only 1 item.• Make the Required Date 2 weeks from today's date.• The Vendor is Dell Computer.• The Line Cost is 3,549 dollars. Make sure that the Store Location field is blank.
2	After you click Submit , click View Details .
3	Write your PR number here: _____.

Review Questions

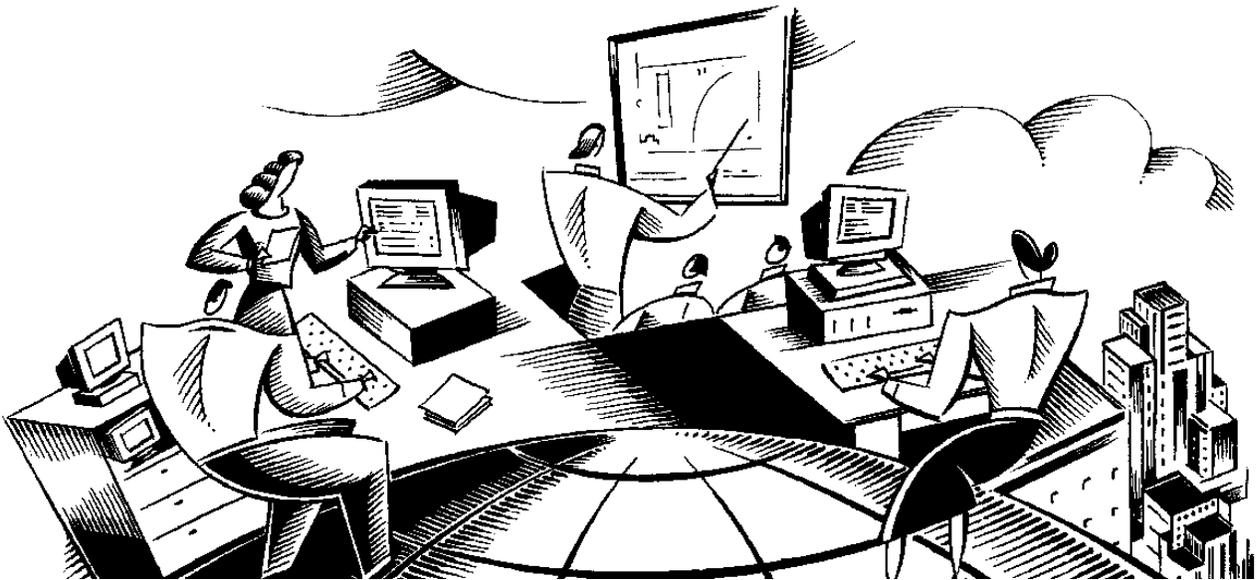
Review Questions



1. What are the various ways to create a PR?
 2. What are the possible statuses on a PR?
-

IT Asset Configuration and Management in MXES

Chapter 6: Request for Quotations



In This Chapter

This chapter contains the following topics:

Topic	See Page
Chapter Overview	6-1
The Request for Quotations Application	6-2
Creating an RFQ	6-6
Adding RFQ Lines	6-7
Adding RFQ Vendors	6-8
Entering Quotation Lines	6-10
Awarding Quotation Lines	6-12
Creating a PO from an RFQ	6-13
Creating a Contract from an RFQ	6-16
Chapter Summary	6-18
Workshop	6-19
Review Questions	6-20

Chapter Overview

Introduction

A new purchase requires that requests for quotations (RFQs) be sent out to several vendors to compare pricing, delivery commitments, and other factors to determine the new supplier of these goods. The Purchasing Manager will enter the information into a request for quotation and send it to multiple vendors.

Chapter Focus

In this chapter, we will focus on using the Request for Quotations application.

Learning Objectives

When you have completed this chapter, you should be able to:

- create an RFQ from the Request for Quotations application,
 - create RFQ from a PR,
 - create a PO from an RFQ, and
 - create a contract from an RFQ.
-

The Request for Quotations Application

Introduction

A *request for quotation* (RFQ) is a request that you send out to one or more potential vendors. Creating requests for quotations will help ensure that purchases are being sourced from the most suitable supplier at the best possible price, thus maximizing capital utilization.

Request for Quotations Application

You use the Request for Quotations application to create requests for quotations and to store the quotations so you can assess which vendor best meets your needs. In the RFQ application, you can specify line items, required delivery dates, and other conditions you want the vendor to meet for the delivery of an item or service. To add a vendor to the RFQ, you must first create it in the Companies application.

When you receive the quotations from the vendors, you enter them into the Request for Quotations application one at a time. At the end of the process, you review the quotations and award one quotation for each RFQ line. The quotations are then converted to one or more purchase orders or contracts, depending on the procurement flow in your organization.

You should provide as much detail as possible for RFQ lines, so that vendors can provide accurate quotes based on your specified information.

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The Request for Quotations Application continued

Request for Quotations Application Tabs

The Request for Quotations application has six tabs: List, RFQ, RFQ Lines, Vendors, Quotations, and Terms and Conditions. The following table describes each of these tabs.

Use this tab...	To...
List	Search the database using any combination of available fields.
RFQ	<p>You use the RFQ tab to enter general “header” information about the RFQ. This includes a description, desired date of the response, close date, and other pertinent information.</p> <p>You can also use the RFQ tab to view existing RFQs and to check or change their status.</p>
RFQ Lines	<p>You use the RFQ Lines tab to enter the items or services that require quotations from one or more vendors.</p> <p>You can enter the information manually, or you can use the Copy PR Lines to RFQ action. When you copy PR lines, copied information includes the item identifiers, quantities desired, and other item-specific information. In addition, some of the information on the RFQ tab is automatically populated.</p>
Vendors	<p>You use the Vendors tab to enter the vendors to whom the request for quotation is to be sent, as well as terms and conditions received from each vendor. You can copy the vendor information over from the Companies application, or fill it in manually. You should provide the vendor name, contact, phone number, and other vendor-specific information.</p> <p>You can also fill in rows on the Vendors tab by using the Copy PR Lines to RFQ action. If there is a vendor associated with the copied PR line, that vendor is added to the RFQ Vendors list. Therefore, it is possible to enter a different vendor to the RFQ Vendors list for each new PR line added. If a specific vendor appears in more than one PR line, the vendor appears only once on the RFQ Vendors tab.</p>

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The Request for Quotations Application continued

Request for
Quotations
Application Tabs continued

Use this tab...	To...
Quotations	<p>You use the Quotations tab to enter quotation information from the vendors responding to your RFQ.</p> <p>The Vendor subtab lists the RFQ's vendors. It also contains the Quotations for Vendor table in which you can enter, edit, review, and award quotations for the selected vendor, item by item.</p> <p>The Item subtab lists the items on the RFQ. It also contains the Quotations for Item table in which you can edit, review, and award quotations for the selected item, vendor by vendor. You can also award individual line items or award all quotations to a selected vendor</p> <p>When you enter quotation data on one subtab, it also is available on the other subtab. For example, if you enter a vendor and quotes for three items from that vendor on the Vendor tab, you also can view the quotes for that vendor by item, on the Item tab. You can also award quotations item by item.</p>
Terms and Conditions	<p>You use the Terms and Conditions tab to associate new or existing terms with an RFQ. You can enter a new term on this tab, or you can choose from the library of existing terms from the Terms and Conditions application.</p>

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The Request for Quotations Application continued

Statuses

There are six possible statuses for an RFQ. The following table describes the statuses.

Status	Description
In Progress (INPRG)	This is the default when you create an RFQ. You should not change this status until you have entered all the information and lines. When in this status, you can edit most fields on the RFQ, with the exception of the Quotation Lines table. The RFQ must be saved as INPRG prior to changing to another status. The status INPRG is always available (except in COMPLETE and CLOSED status) to allow you to edit the RFQ.
Ready to Be Sent (READY)	An RFQ in this status is ready to be sent out to the vendors. In this status, you cannot change the RFQ. All fields are read-only.
Sent to the Vendor (SENT)	An RFQ in this status has been sent to vendors. In this status, the fields on the RFQ and RFQ Lines tabs are read-only, but fields on the Vendors, Quotations, and Terms and Conditions tabs can be modified.
Completed (COMP)	This status indicates that all quotations have been received from vendors. In this status, all fields except those on the Quotation Lines and Terms and Conditions tabs are read-only.
Canceled (CANCEL)	Use the CANCEL status to cancel a current or a selected set of RFQs. You can cancel an RFQ only if there have not been any quotations awarded (i.e., the CANCEL status is not available after a quotation has been converted to a PO). A canceled RFQ is stored as a history record and cannot be modified.
Closed (CLOSE)	This status indicates that the quotation lines have been awarded. After an RFQ is closed, it is stored as a history record and cannot be modified.

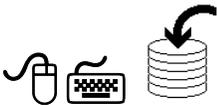
Creating an RFQ

Introduction

You can create an RFQ directly from a PR or PO using the **Create RFQ** action. You can also create an RFQ from the **Request for Quotations** application. In this exercise, we are going to create an RFQ for our laptop (D601xx) using the Request for Quotations application.

Exercise: Creating an RFQ

To create an RFQ, complete the following steps.



Step	Action
1	Open the Request for Quotations application in the Purchasing module.
2	Click on the New RFQ icon. <u>Result:</u> A new RFQ is created and is automatically numbered, although you can change the number if you want to.
3	Enter Laptops for Salesforce in the Description field.
4	Enter 3 weeks from today's date in the Required Date field to indicate the date when the line items are needed.
5	Enter 1 week from today's date in the Reply Date field to indicate the date by which the vendor should reply.
6	Enter today's date in the Printed Date field to indicate the date on which the RFQ was sent to the vendor.
7	Enter 2 weeks from today's date in the Close Date field to indicate the date after which no further quotations will be accepted from vendors.
8	Save the record.

Adding RFQ Lines

Introduction

You can insert line items on the RFQ Lines tab manually or by copying lines from a PR using the **Copy PR Line Items to RFQ** action. In the following exercise, we will copy the lines from the PR we created for our sales laptops.

Exercise: Adding RFQ Lines



To add RFQ lines using the **Copy PR Line Items to RFQ** action, complete the following steps.

Step	Action
1	With the RFQ you created in the previous exercise open, click on the RFQ Lines tab.
2	From the Select Action menu, select Copy PR Line Items to RFQ . <u>Result:</u> The Copy PR Line Items to RFQ dialog box opens.
3	Search for and select the PR we created for item D601xx .
4	Click OK . <u>Result:</u> The line items are copied to the RFQ.

Adding RFQ Vendors

Introduction

When you create an RFQ, you typically list the vendor or vendors to whom you will send the RFQ. If you intend to enter quotations from vendors on the Quotations tab later, you *must* enter the vendors on the Vendors tab before changing the status to SENT. (The RFQ status must be INPRG in order to add vendors.)

In the following exercise, we will add two vendors to our RFQ.

Exercise: Adding RFQ Vendors



To add vendors to the RFQ, complete the following steps.

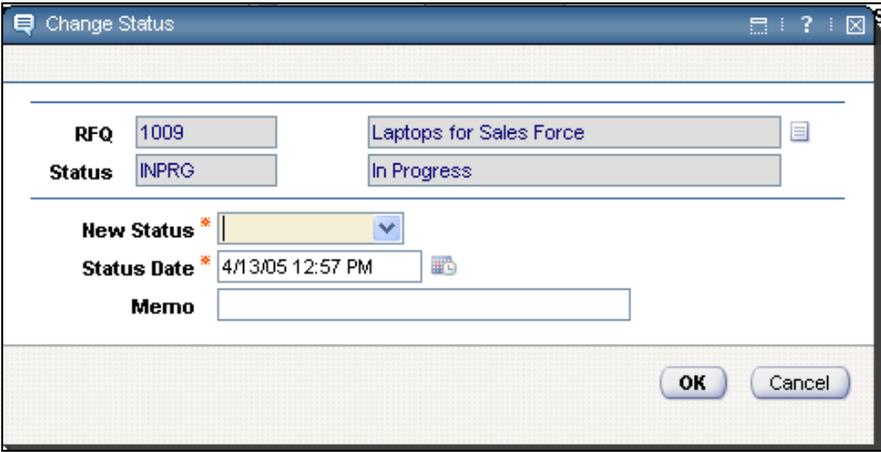
Step	Action
1	With your newly created RFQ open, click on the Vendors tab.
2	Click New Row in the RFQ Vendors section of the screen. <u>Result:</u> The Vendor form expands. <div data-bbox="516 1087 1398 1346" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> </div>
3	Click the Detail Menu button on the Vendor field, and then click on Select Value .
4	Search for and select the company we created earlier in the course, VANTARxx in the Organization EAGLENA .
5	Follow steps 2–4 to add DELL to the RFQ vendors.

continued on next page

Adding RFQ Vendors continued

Exercise:
Adding RFQ
Vendors

continued

Step	Action
6	<p>Click the Change Status icon. Result: The Change Status dialog box opens.</p> 
7	Select Sent to the Vendor from the New Status drop-down menu.
8	Click OK .
9	Save the record.

Entering Quotation Lines

Introduction

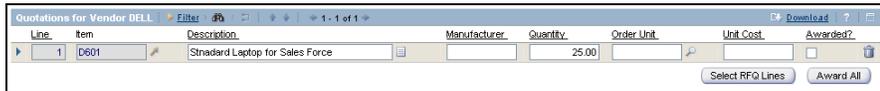
After you create an RFQ and send it to the listed vendors, you typically receive responses with quotes for one or more of your RFQ lines from each vendor. The quotations might arrive by mail, fax, e-mail, or telephone.

When you receive the quotations, you can enter them on the **Quotations** tab in order to have a complete record of the quotations. After entering all the quotations, you can compare them and award the lines based on the comparison.

Exercise: Entering Quotation Lines



To enter quotation lines on your RFQ, complete the following steps.

Step	Action
1	With the RFQ open, click on the Quotations tab.
2	Select Dell , then click Select RFQ Lines . <u>Result:</u> The Select RFQ Lines dialog box opens. 
3	Click in the check box next to the line item to select it.
4	Click OK . <u>Result:</u> The line appears in the Quotations for Vendor DELL section of the screen. 
5	Click the View Details icon next to the line.

continued on next page

Entering Quotation Lines continued

Exercise: continued
Entering
Quotation Lines

Step	Action														
6	Enter the following details: <table border="0"> <thead> <tr> <th data-bbox="558 596 634 630"><u>Field</u></th> <th data-bbox="824 596 901 630"><u>Value</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="558 638 683 672">Remarks</td> <td data-bbox="824 638 1052 672">12 Month Lease</td> </tr> <tr> <td data-bbox="558 680 716 714">Order Unit</td> <td data-bbox="824 680 911 714">EACH</td> </tr> <tr> <td data-bbox="558 722 695 756">Unit Cost</td> <td data-bbox="824 722 906 756">1,500</td> </tr> <tr> <td data-bbox="558 764 737 798">Tax Amount</td> <td data-bbox="824 764 894 798">3750</td> </tr> <tr> <td data-bbox="558 806 792 840">Quote Start Date</td> <td data-bbox="824 806 1008 840">[Today's date]</td> </tr> <tr> <td data-bbox="558 848 781 882">Quote End Date</td> <td data-bbox="824 848 1117 882">[One week from today]</td> </tr> </tbody> </table>	<u>Field</u>	<u>Value</u>	Remarks	12 Month Lease	Order Unit	EACH	Unit Cost	1,500	Tax Amount	3750	Quote Start Date	[Today's date]	Quote End Date	[One week from today]
<u>Field</u>	<u>Value</u>														
Remarks	12 Month Lease														
Order Unit	EACH														
Unit Cost	1,500														
Tax Amount	3750														
Quote Start Date	[Today's date]														
Quote End Date	[One week from today]														
7	Save the record.														
8	Complete steps 2–6 for the vendor VANTARxx . Enter the following details: <table border="0"> <thead> <tr> <th data-bbox="558 1024 634 1058"><u>Field</u></th> <th data-bbox="834 1024 911 1058"><u>Value</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="558 1066 683 1100">Remarks</td> <td data-bbox="834 1066 1062 1100">12 Month Lease</td> </tr> <tr> <td data-bbox="558 1108 716 1142">Order Unit</td> <td data-bbox="834 1108 920 1142">EACH</td> </tr> <tr> <td data-bbox="558 1150 695 1184">Unit Cost</td> <td data-bbox="834 1150 915 1184">1,250</td> </tr> <tr> <td data-bbox="558 1192 737 1226">Tax Amount</td> <td data-bbox="834 1192 904 1226">3125</td> </tr> <tr> <td data-bbox="558 1234 792 1268">Quote Start Date</td> <td data-bbox="834 1234 1018 1268">[Today's date]</td> </tr> <tr> <td data-bbox="558 1276 781 1310">Quote End Date</td> <td data-bbox="834 1276 1122 1310">[One week from today]</td> </tr> </tbody> </table>	<u>Field</u>	<u>Value</u>	Remarks	12 Month Lease	Order Unit	EACH	Unit Cost	1,250	Tax Amount	3125	Quote Start Date	[Today's date]	Quote End Date	[One week from today]
<u>Field</u>	<u>Value</u>														
Remarks	12 Month Lease														
Order Unit	EACH														
Unit Cost	1,250														
Tax Amount	3125														
Quote Start Date	[Today's date]														
Quote End Date	[One week from today]														
9	Save the record.														

Awarding Quotation Lines

Introduction

You can award quotation lines to a vendor on the Quotations tab in the RFQ application. You can award individual line items to different vendors or you can award all quoted line items to a single vendor. In this exercise, we will award our quotation lines to the company Vantar.

Exercise: Awarding Quotation Lines

To award a contract to a vendor, complete the following steps:



Step	Action
1	With the RFQ open, click on the Quotations tab.
2	On the Vendor subtab, click on VANTAR .
3	In the Quotations for Vendor VANTAR section of the screen, click in the Awarded? check box for the line item
4	Save the record. <u>Result:</u> The quotation is awarded to the vendor.

Creating a PO from an RFQ

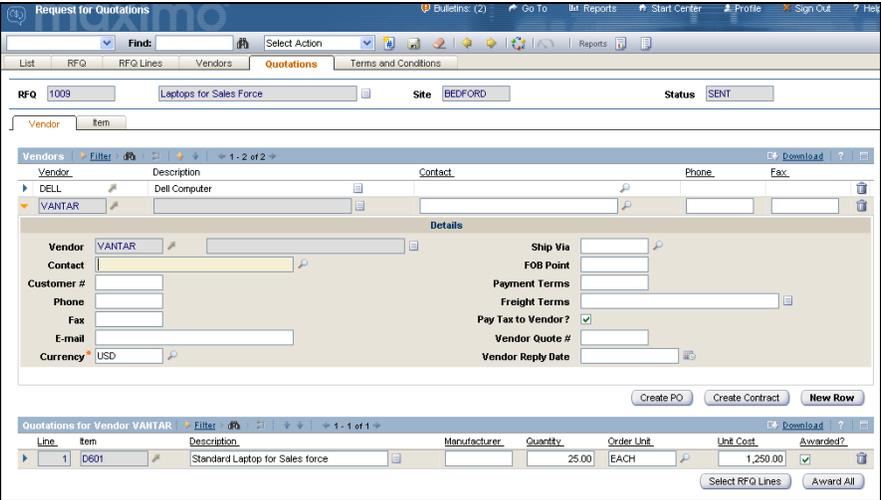
Introduction

After you award quotation lines, you can create a PO for the vendor and the line items. The RFQ must be in SENT or COMP status for you to award quotation lines and create a PO. In this exercise, we will create a PO from this RFQ, then approve the PO after entering the GL account information.

Exercise: Creating a PO from an RFQ



To create a PO from an RFQ, complete the following steps.

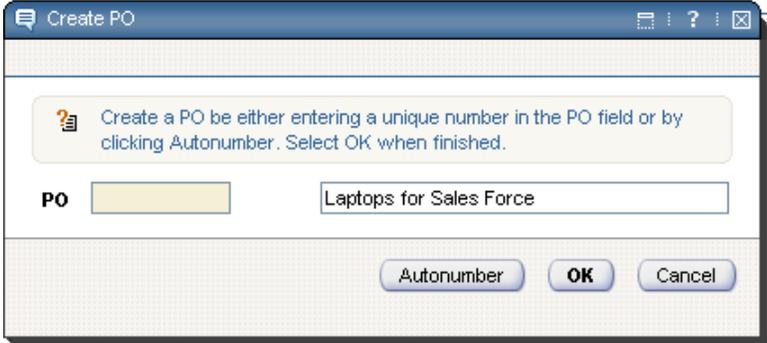
Step	Action
1	With the RFQ open, click on the Quotations tab.
2	<p>On the Vendor subtab, click the View Details button next to VANTAR.</p> <p><u>Result:</u> Maximo displays the vendor details.</p> 

continued on next page

Creating a PO from an RFQ continued

Exercise:
Creating a PO
from an RFQ

continued

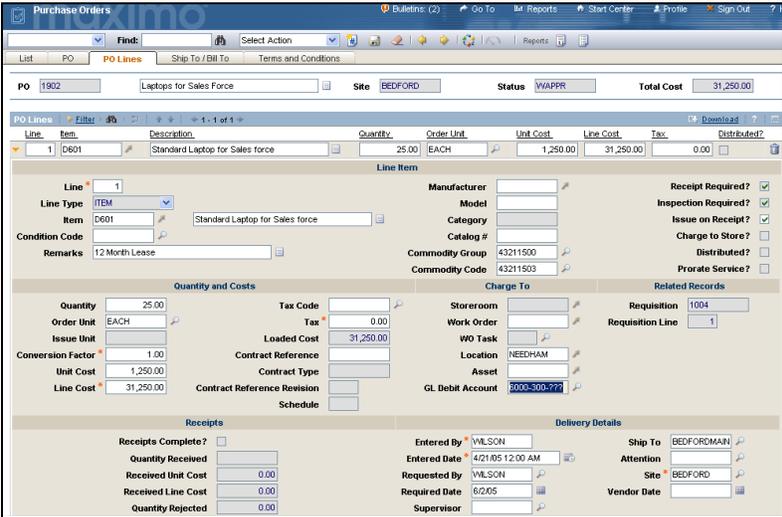
Step	Action
3	<p>Click Create PO.</p> <p><u>Result:</u> The Create PO dialog box opens.</p> 
4	<p>Enter 1902xx in the PO field. That will be the PO number.</p> <p><u>Note:</u> You can also click Autnumber to assign a number, and you can change the description if you want.</p>
5	<p>Click OK.</p> <p><u>Result:</u> A PO is created and the status of the RFQ is changed to CLOSE.</p> 
6	Go to the Purchase Orders application and locate PO 1902xx .
7	Click the PO Lines tab.

continued on next page

Creating a PO from an RFQ continued

**Exercise:
Creating a PO
from an RFQ**

continued

Step	Action
8	<p>Click the View Details button next to Line 1. Result: The view is expanded.</p> 
9	Clear the Issue on Receipt? check box.
10	Enter HARDWARE in the Storeroom field in the Charge To section of the screen, then tab out of the field. This is the location at which we will receive the item.
11	Use the Change Status icon to change the status to Approved . Result: The PO is approved and the fields are read-only.

Note on Creating POs



Multiple purchase requisitions can be combined to create a single purchase order in the Purchase Orders application. This reduces the number of purchase orders that must be processed as part of the site's procurement system, while still delivering the same procurement performance. This ultimately reduces the cost per purchase order for the site.

Creating a Contract from an RFQ

Introduction

After you have evaluated various bids from vendors on RFQs and awarded items to a vendor, you need to create a contract from that awarded bid. In the following exercise, we will learn how awarded quotations can be converted into contracts.



Note: You can also create a contract from a PR, PO, or invoice using the Create Contract dialog box available from multiple purchasing applications.

Exercise: Creating a Contract from an RFQ

To create a contract from an RFQ, complete the following steps.



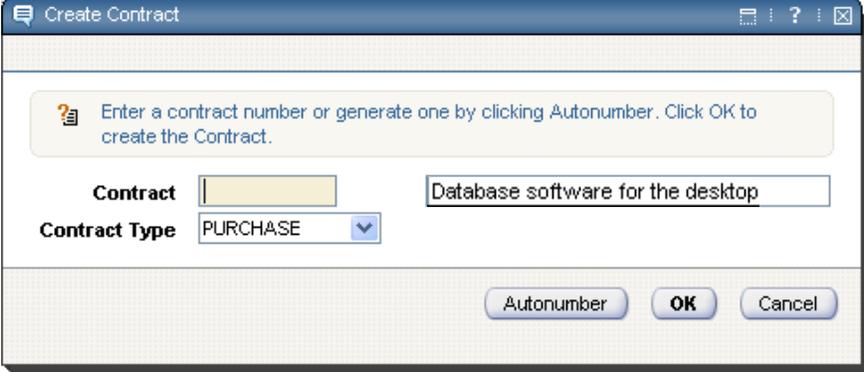
Step	Action
1	In the Request for Quotations application, search for and select RFQ 21 .
2	Change the status to Sent to the Vendor .
3	Click on the Quotations tab.
4	Click Select RFQ Lines .
5	Select the line item and click OK .
6	Enter 25.00 in the Unit Cost field.
7	Save the record.
8	Award all the lines by clicking the Award All button.

continued on next page

Creating a Contract from an RFQ continued

Exercise:
Creating a
Contract from
an RFQ

continued

Step	Action
9	<p>Click Create Contract.</p> <p><u>Result:</u> The Create Contract dialog box opens.</p> 
10	Click Autonumber . Write the number here: _____.
11	Click OK . <u>Result:</u> A contract is created for these line items and vendor.
12	Go to the Purchase Contracts application and locate the contract you just created.

Chapter Summary

Request for Quotations Application

The Request for Quotations application allows you to create and store requests for quotations in order to make decisions when purchasing items. After you review and award quotations for each RFQ line, they are converted to one or more purchase orders or contracts, depending on the procurement flow in your organization.

Creating a Contract

You can create a contract directly from the Request for Quotations application, or you can create one from a PR, PO, or invoice using the Create Contract dialog box available from several purchasing applications.

Workshop

Exercise



In this exercise, we are going to create a request for quotation for purchasing the database server (Item S431) we created in the workshop in Chapter 2.

Step	Action																				
1	<p>Create a new request for quotation using the following information:</p> <table> <thead> <tr> <th><u>Field</u></th> <th><u>Value</u></th> </tr> </thead> <tbody> <tr> <td>Required Date</td> <td>[6 weeks from today's date]</td> </tr> <tr> <td>Reply Date</td> <td>[3 weeks from today's date]</td> </tr> <tr> <td>Close Date</td> <td>[3 weeks from today's date]</td> </tr> </tbody> </table>	<u>Field</u>	<u>Value</u>	Required Date	[6 weeks from today's date]	Reply Date	[3 weeks from today's date]	Close Date	[3 weeks from today's date]												
<u>Field</u>	<u>Value</u>																				
Required Date	[6 weeks from today's date]																				
Reply Date	[3 weeks from today's date]																				
Close Date	[3 weeks from today's date]																				
2	Add Item S341xx as your RFQ line item.																				
3	Add VANTARxx and MULTIxx as your vendors and add the item S431 as the line item for each.																				
4	Change the status of the RFQ to Sent to Vendors .																				
5	<p>Add the following quotation information for the line item for each of the vendors.</p> <table> <thead> <tr> <th colspan="2"><u>MULTIxx EAGLENA</u></th> </tr> </thead> <tbody> <tr> <td>Order Unit</td> <td>Each</td> </tr> <tr> <td>Line Cost</td> <td>4,105</td> </tr> <tr> <td>Tax Amount</td> <td>410</td> </tr> <tr> <td>Economic Order Quantity</td> <td>1</td> </tr> </tbody> </table> <table> <thead> <tr> <th colspan="2"><u>VANTARxx EAGLENA</u></th> </tr> </thead> <tbody> <tr> <td>Order Unit</td> <td>Each</td> </tr> <tr> <td>Line Cost</td> <td>3,549</td> </tr> <tr> <td>Tax Amount</td> <td>350</td> </tr> <tr> <td>Economic Order Quantity</td> <td>1</td> </tr> </tbody> </table>	<u>MULTIxx EAGLENA</u>		Order Unit	Each	Line Cost	4,105	Tax Amount	410	Economic Order Quantity	1	<u>VANTARxx EAGLENA</u>		Order Unit	Each	Line Cost	3,549	Tax Amount	350	Economic Order Quantity	1
<u>MULTIxx EAGLENA</u>																					
Order Unit	Each																				
Line Cost	4,105																				
Tax Amount	410																				
Economic Order Quantity	1																				
<u>VANTARxx EAGLENA</u>																					
Order Unit	Each																				
Line Cost	3,549																				
Tax Amount	350																				
Economic Order Quantity	1																				
6	Award VANTARxx .																				
7	Create a PO from the awarded RFQ. Write the number here: _____																				
8	Go to the Purchase Orders application and find the PO.																				
9	Enter HARDWARE in the Storeroom field (PO Lines tab, Charge To section of the screen).																				
10	Change the status to Approved .																				

Review Questions

Review Questions

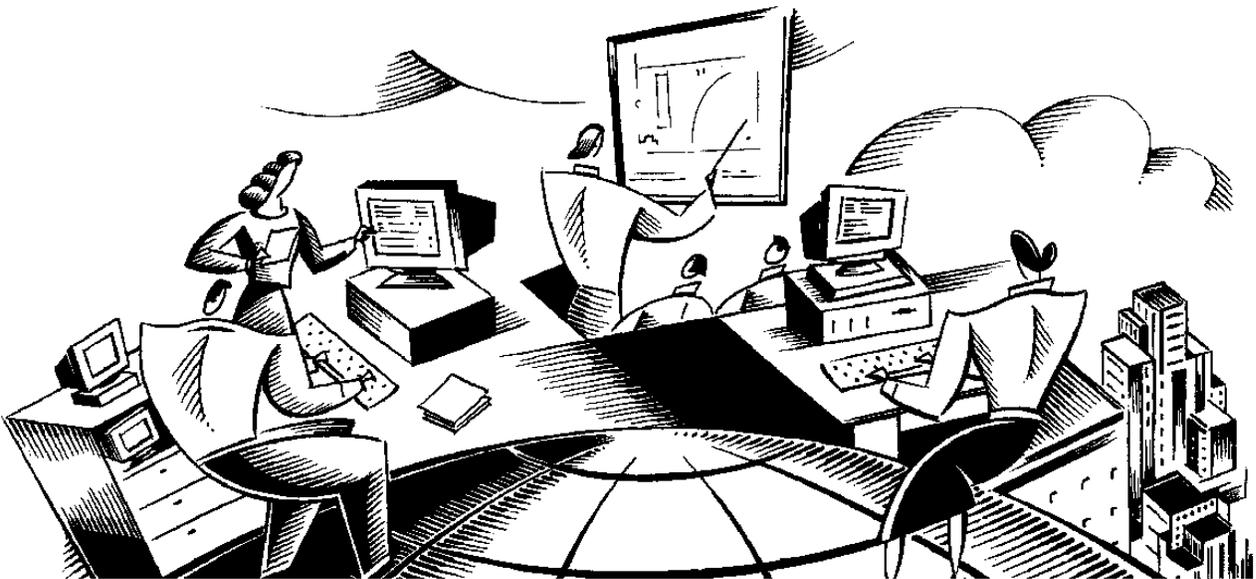


1. What do you need to do if you want to request a quotation from a vendor that does not exist in the database?

 2. What can you do on the Terms and Conditions tab?
-

IT Asset Configuration and Management in MXES

Unit 4: Deployment



In This Unit

This unit contains the following chapters:

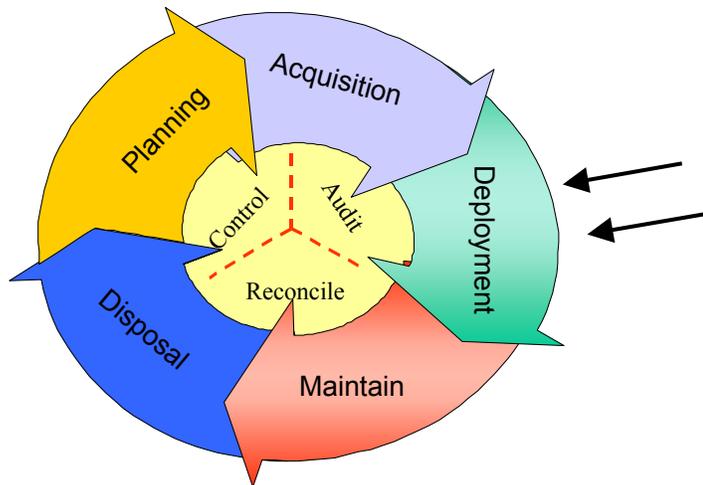
Chapter	Subject
7	Receiving
8	Moves and Swaps

Unit Purpose

The purpose of this unit is to demonstrate how Maximo supports the deployment phase in asset configuration and management.

Deployment and the IT Lifecycle

Deployment and the IT Lifecycle



We have gone through the planning and acquisition phases, and we are now ready for the third phase: deployment of our newly acquired assets.

Deployment

Efficient and effective deployment practices for receiving and deploying your assets to the user; handling moves, mass moves, and swaps; and monitoring your software and hardware usage: these are all key to optimizing your usage and minimizing costs.

Maximo enables you to manage all of these areas through its receiving and IMAC capabilities.

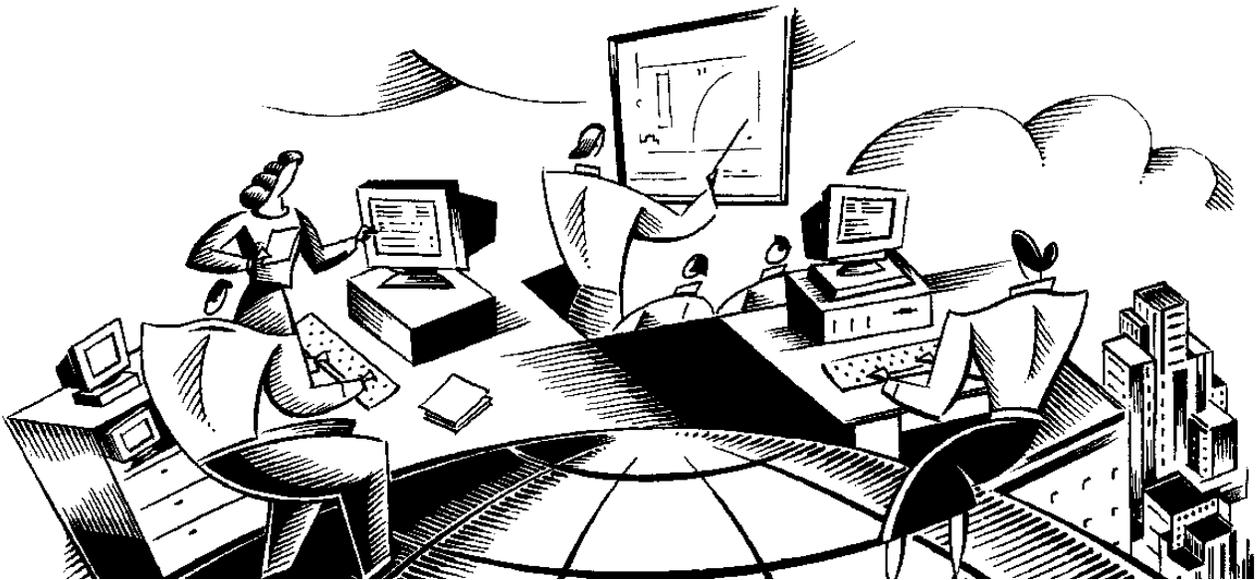
Unit Scenario

Scenario

In this unit we will continue with the previous unit's scenario in which you created a requisition and an RFQ for the sales laptops. For this unit, we will receive the laptops and deploy them. In addition, we will manage moves, mass moves, and swaps on our assets.

IT Asset Configuration and Management in MXES

Chapter 7: Receiving



In This Chapter

This chapter contains the following topics:

Topic	See Page
Chapter Overview	7-1
The Receiving Application	7-2
Receiving, Serializing, and Configuring Assets	7-4
Issuing an Asset to a Location	7-10
Assigning an Asset to a User	7-11
Changing Asset Status	7-13
Chapter Summary	7-15
Workshop	7-16
Review Questions	7-17

Chapter Overview

Introduction

IT assets are ordered as items. Items are not serialized or uniquely identified. As assets are received in Maximo, you can serialize them, and they will then be uniquely identified by asset numbers. Some assets have assemblies or software configurations that will need to be recognized and respected as the asset is prepared for deployment. Maximo provides a means to simply apply these configurations as the assets are received. This chapter discusses the receipt, serialization, and configuration of assets.

Chapter Focus

In this chapter, we will focus on using the Receiving application.

Learning Objectives

When you have completed this chapter, you should be able to:

- receive rotating items,
 - deploy items to a user,
 - send an item to a storeroom, and
 - serialize and configure received assets.
-

The Receiving Application

Introduction

Maximo allows you to enter receipts on the items and services you purchase. Incoming assets can be held for inspection and serialized. In addition, a configuration template (Item Assembly Structure) can be applied to the incoming assets through the Receiving application.

The Receiving Application

You can use the Receiving application to receive materials and services from purchase orders. You also can approve materials and service receipts for services and materials that require inspection

If you work in a large company, you might have a centralized purchasing department covering several sites. However, materials and services might need to be received at the individual sites. The Receiving application allows both materials and services to be received and recorded in the database when they are delivered to a site.

Material Receipts

When you receive items on an approved PO, you will enter them on the **Material Receipts** tab. If you have received the entire order, you can copy all the PO line items to the Material Receipts tab. If you receive only part of the order, you can enter partial receipts. You can also note any discrepancies between what was ordered and what was received, and/or what was rejected.

PO Line	Item	Description	Quantity	Order Unit	Type	Insp. Status	Actual Date
1	D600	Standard Laptop Computer	15.00	EACH	RECEIPT	COMP	10/8/04 12:00 AM
2	D650	Series II Laptop	15.00	EACH	RECEIPT	COMP	10/8/04 12:00 AM
2	D650	Series II Laptop	15.00	EACH	TRANSFER	COMP	10/8/04 12:00 AM

When you enter an item receipt, Maximo creates an inventory transaction for that item. Maximo increases the balance of the item at its primary location by the quantity of the receipt and decreases the quantity on order by the quantity received.

After you save the receipt, the fields on the Material Receipts tab become read-only.

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The Receiving Application continued

Service Receipts

When you receive a service on an approved PO, you enter it on the **Service Receipts** tab. As with materials, you can receive all the items, or enter partial receipts.

The recording of service receipts can occur when a contractor or vendor submits a claim. Then, someone at your company who has the authority to check the cost of services approves the receipt.

The screenshot displays the 'Receiving' application interface. At the top, there is a navigation bar with 'Bullitins: (2)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar with 'Find:' and a 'Select Action' dropdown. The main content area is divided into two tabs: 'Material Receipts' and 'Service Receipts', with 'Service Receipts' being the active tab. The 'Service Receipts' form contains several fields: PO (1068), Company (DATASTAR), Attention, Site (BEDFORD), Pretax Total (5,000.00), Received Cost (0.00), PO Status (APPR), Receipts (NONE), and Ordered Date (4/22/05 12:00 AM). Below the form is a table with columns: PO Line, Description, Quantity, Type, Transaction Date, Received By, Work Order, and Insp. Status. The table contains one row: PO Line 1, Description Lotus Notes Training, Quantity 1.00, Type RECEIPT, Transaction Date 4/22/05 9:47 AM, Received By WILSON, Work Order, and Insp. Status COMP. At the bottom right of the table are buttons for 'Select Ordered Services' and 'New Row'.

PO Line	Description	Quantity	Type	Transaction Date	Received By	Work Order	Insp. Status
1	Lotus Notes Training	1.00	RECEIPT	4/22/05 9:47 AM	WILSON		COMP

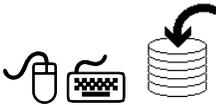
Receiving, Serializing, and Configuring Assets

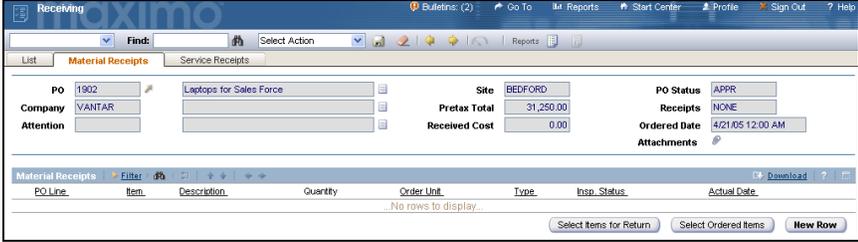
Introduction

As we have learned, Maximo can receive, serialize, and apply a configuration to an ordered asset. In the following exercises, we will receive, serialize, and configure the laptops from the PO we created in the last chapter.

Exercise: Receiving an Asset

To receive an asset, complete the following steps.



Step	Action
1	Go to the Receiving application in the Purchasing module.
2	Enter 1902xx in the PO field and click the Filter Table icon.
3	Select the record. <u>Result:</u> You are taken to the Material Receipts tab. 
4	Click Select Ordered Items . <u>Result:</u> The Select Ordered Items dialog box opens. 

continued on next page

Receiving, Serializing, and Configuring Assets continued

Exercise: Receiving an Asset

continued

Step	Action
5	Select the check box next to the PO Line Item .
6	Click OK . <u>Result:</u> You are returned to the Material Receipts tab and the status is changed to WINSP (Waiting for Inspection) because this line item requires inspection.
7	Save the record.

Exercise: Serializing the Asset



You will use the Receive Rotating Items action to serialize the assets. By doing this, you will assign a unique identifier for each of the rotating assets being received. Because the items we received require inspection, we will assume that we inspected all of the laptops, and we will first change the status from WINSP to WASSET.

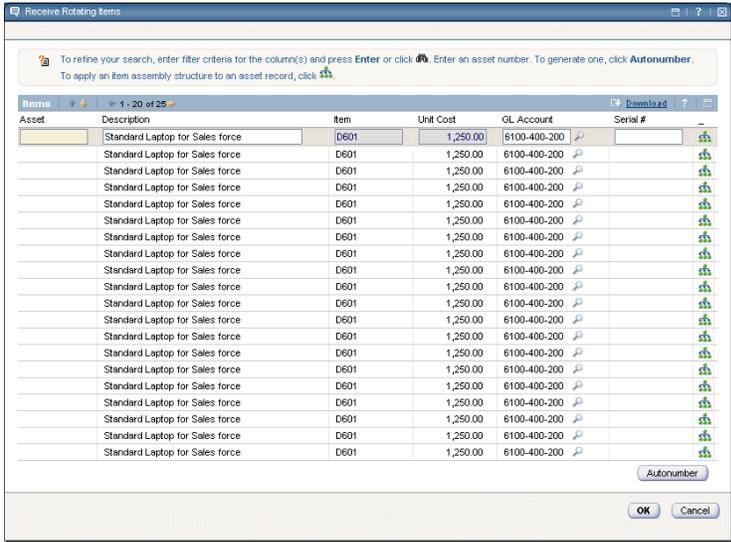
Step	Action
1	Choose Change Inspection Status from the Select Action menu. <u>Result:</u> The Change Inspection Status dialog box opens. 
	 <u>Note:</u> On this screen you can accept or reject any number of the items received.
2	In this case, we will assume that all of our items are fine. Click on the check box next to the first PO Line Item .
3	Click OK . <u>Result:</u> The status is changed to WASSET.

continued on next page

Receiving, Serializing, and Configuring Assets continued

**Exercise:
Serializing the
Asset**

continued

Step	Action
4	<p>Choose Receive Rotating Items from the Select Action menu. <u>Result:</u> The Receive Rotating Items dialog box displays all 25 of the laptops.</p> 
5	<p>Click Autonumber. <u>Result:</u> Maximo automatically generates the asset numbers for you.  <u>Note:</u> You can also enter the asset numbers manually. You would also enter serial numbers for each of the assets, but for this exercise, we will not.</p>
6	Write down the numbers for the first 5 assets here.
7	<p>Enter serial numbers for the first 5 assets here.</p> <p>Keep this window open for the following exercise.</p>

continued on next page

Receiving, Serializing, and Configuring Assets continued

Note on Numbering Assets



In step 5 of the previous exercise, in the interest of time, we used the Autonumber button to assign asset numbers. However, it should be noted that the serial number can be used to check authorized assets against deployed assets. How correctly you enter the data, and which fields are being used to compare the two tables, determines the fields used during reconciliation. For example, your organization might decide that the asset number will be used and the asset number will be the serial number of the asset. In this case, you should not use the Autonumber feature.

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Receiving, Serializing, and Configuring Assets continued

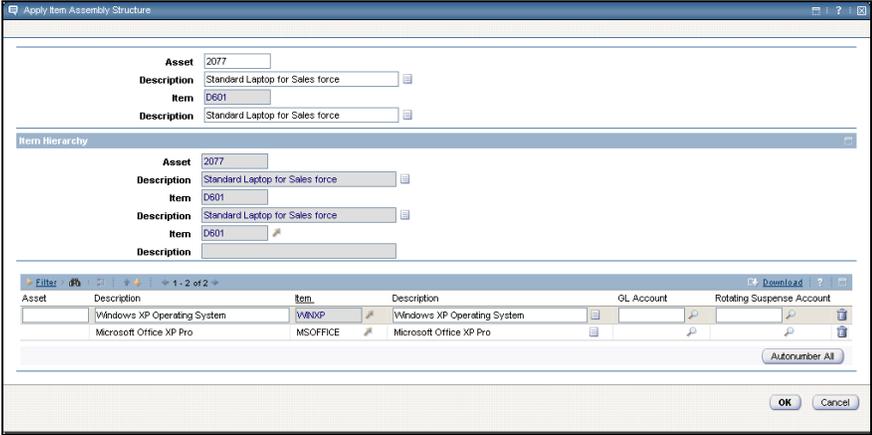
Configuring the Asset

By applying an Item Assembly Structure, the receiver (or asset manager) can apply a configuration template against the asset in one step. The template would typically include software titles or hardware components that are delivered/loaded with the asset. Software specific to the site that will be added later by IT staff should not be part of the IAS, because these will already have a unique identifier and will be dispensed from a software license pool.

Exercise: Configuring the Asset



To configure the assets, complete the following steps.

Step	Action
<p>1</p>	<p>With the Receive Rotating Items dialog box open, click on the Apply Item Assembly Structure  icon to the right of the first asset.</p> <p><u>Result:</u> The Apply IAS dialog box opens.</p> 
<p>2</p> 	<p>Click Autonumber.</p> <p><u>Result:</u> Maximo automatically generates the asset numbers for you.</p> <p><u>Note:</u> You can also enter the asset numbers manually.</p>

continued on next page

Receiving, Serializing, and Configuring Assets continued

Exercise: continued
Configuring the Asset

Step	Action
3	Click OK .
4	Apply an IAS to the next 4 assets on the list. Normally you would apply the IAS for the remaining assets, but for this exercise we will not.
5	Click OK . <u>Result:</u> Maximo creates an asset record and changes the status of the line item from WASSET to COMP (Complete) for each item you received. Because we received a rotating item that required inspection, Maximo also creates a transfer transaction, transferring the item from the holding location to its storeroom (or direct issue location).

Issuing an Asset to a Location

Introduction

In the following exercise we will issue one of the laptops (**D601**) received in the previous step to a location (Fieldstaff).

Exercise: Issuing an Asset to a Location

To issue an asset to a location, complete the following steps.



Step	Action
1	Go to the Issues and Transfers application.
2	Enter Hardware in the Storeroom field, then click on the Filter Table icon.
3	Select Hardware . <u>Result:</u> You are taken to the Issue tab.
4	Click New Row .
5	Enter D601 in the Item field.
6	Look at the <i>first</i> asset number you wrote down in step 6 of the “Serializing the Asset” exercise. Enter that number in the Rotating Asset field.
7	Search for and select Fieldstaff for the Location field.
8	Save the record. <u>Result:</u> The asset is issued to the location.

Assigning an Asset to a User

Introduction

The next step is to assign the asset to the user. In this exercise we will associate a user with the laptop we transferred in the previous exercise. This will ensure that we know who is responsible for this laptop.

Exercise: Assigning an Asset to a User

To assign an asset to a user, complete the following steps.



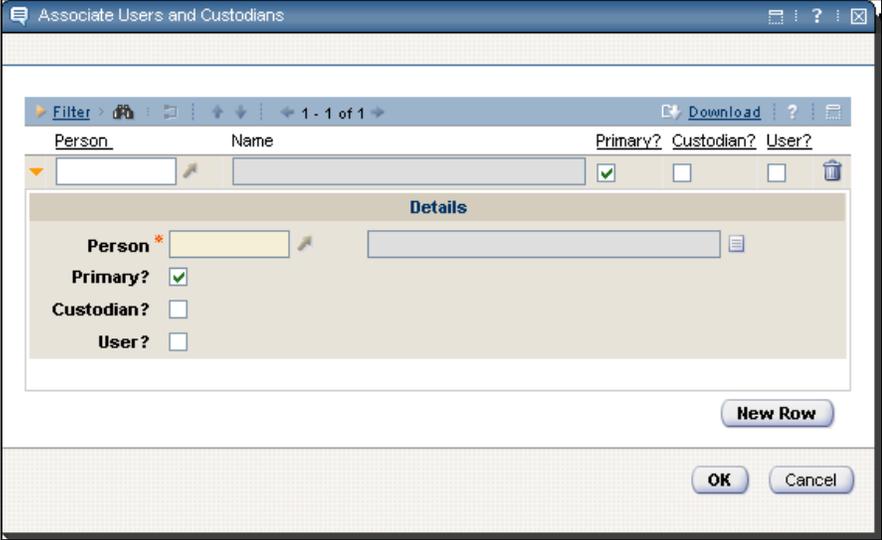
Step	Action
1	Go to the Assets application.
2	Search for and select the asset from the previous exercise.
3	Enter T in the Type field.
4	<p>Select Associate Users and Custodians from the Select Action menu.</p> <p><u>Result:</u> The Associate Users and Custodians dialog box opens.</p>

continued on next page

Assigning an Asset to a User continued

Exercise:
Assigning an
Asset to a User

continued

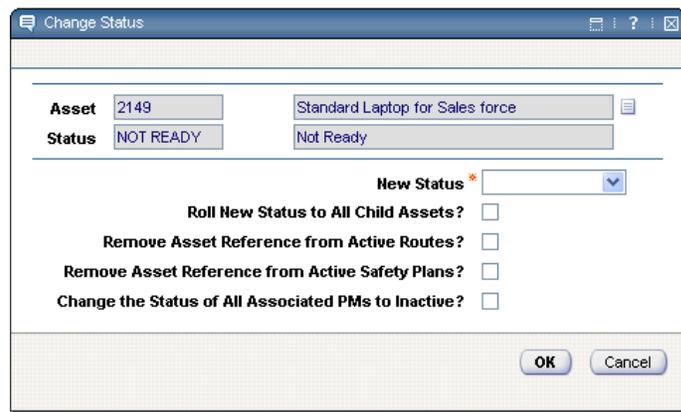
Step	Action
5	<p>Click New Row. <u>Result:</u> A new row opens.</p> 
6	In the Person field, search for and select Kathy Buckner .
7	Select both the Custodian? and User? check boxes.
8	Click OK . <u>Result:</u> The laptop is assigned to Kathy Buckner.

Changing Asset Status

Introduction

After the asset has been assigned to a person, we can change its status to indicate that it is now being used. This is done from the Assets application. First we will take a look at the Change Status dialog box. Then we will change the status of the asset from the previous exercise from NOT READY to OPERATING.

The Change Status Dialog Box



Check Box	Description
Roll New Status to All Child Assets?	Select to specify that all children of the asset whose status you are changing also will have their status changed to the same new status.
Remove Asset Reference from Active Routes?	Select to specify that the asset should no longer be referenced on active routes while the asset is in the new status. For example, if you set an asset's status to Decommissioned, you might want the asset removed from inspection routes. This option is available only when you select the new status as Decommissioned.
Remove Asset Reference from Active Safety Plans?	Select to specify that the asset should no longer be referenced on active safety plans while the asset is in the new status. This is option is available only when you select the new status as Decommissioned.
Change the Status of All Associated PMs to Inactive?	Select to specify that any PMs associated with the asset should be set to Inactive while the asset is in the new status. This option is available only when you select the new status as Decommissioned.

continued on next page

Changing Asset Status continued

Exercise: Changing Asset Status

To change the status of an asset, complete the following steps.



Step	Action
1	With the asset from the previous exercise open, click the Change Status icon. <u>Result:</u> The Change Status dialog box opens.
2	Select OPERATING from the New Status drop-down list. <u>Note:</u> You should only select Decommissioned as the new status if you intend that status change to be permanent.
3	Select the Roll New Status to All Child Assets? check box. This will ensure that the assets in our configuration are also in the Operating status.
4	Click OK . <u>Result:</u> The status is changed.

Chapter Summary

The Receiving Application

You can use the Receiving application to receive materials and services from purchase orders. You can also approve materials and service receipts for services and materials that require inspection.

Receipts

When you enter an item receipt, Maximo creates an inventory transaction for that item. Maximo increases the balance of the item at its primary location by the quantity of the receipt and decreases the quantity on order by the quantity received.

Workshop

Exercise 1



Receive, serialize, and change the inspection status for the item on the PO you created in the workshop for Chapter 6. Remember that this is a rotating item. Write your asset number here: _____.

Exercise 2



Transfer the remaining 4 assets that we configured on page 7-9 from the HARDWARE to the FIELDSTAFF location, assign each of them a user, and change their status to OPERATING.

Review Questions

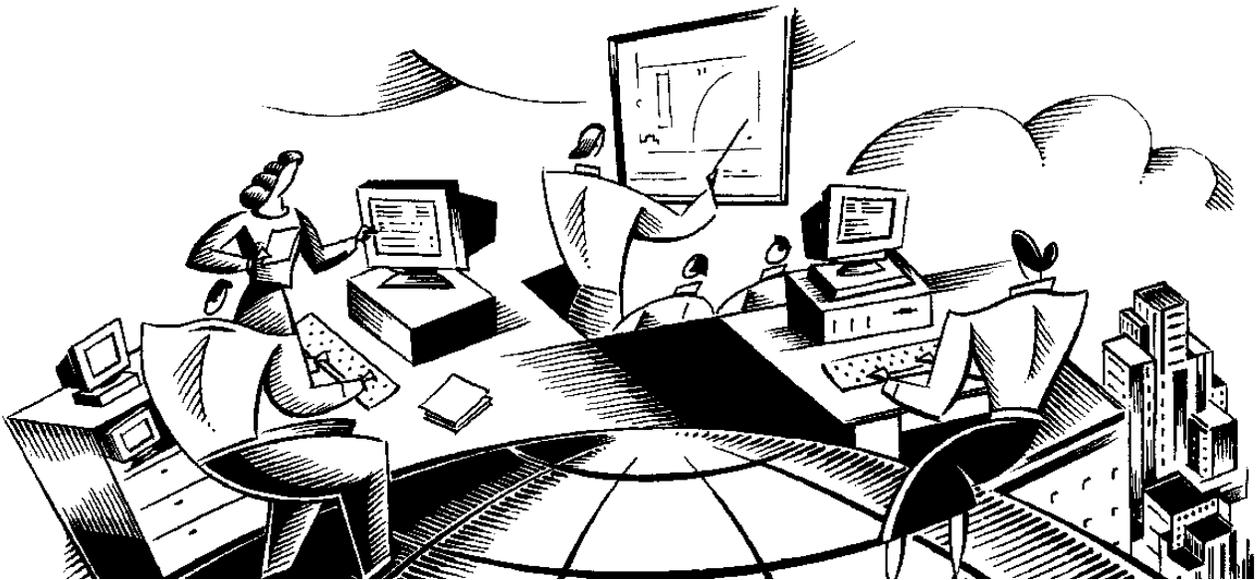
Review Questions



1. If the item you receive requires inspection, where does it go before and after you change the inspection status?
 2. Can you issue an asset from the receiving application?
-

IT Asset Configuration and Management in MXES

Chapter 8: Moves and Swaps



In This Chapter

This chapter contains the following topics:

Topic	See Page
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Work Orders	8-2
Moves	8-9
Mass Moves	8-11
Moving Assets to Different Locations	8-14
Swaps	8-17
Bundling Assets	8-20
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Chapter Overview

Introduction

Asset managers must be able to quickly and easily move assets on a regular basis. In addition, they must be able to easily associate an asset with a user or person, so that there is a record of who is accepting responsibility for this asset and who has it in their possession. Maximo provides asset managers with this capability.

Chapter Focus

In this chapter, we will focus on moving and swapping assets using a variety of scenarios.

Learning Objectives

When you have completed this chapter, you should be able to:

- create a work order,
 - perform moves,
 - perform mass moves,
 - move assets across sites,
 - swap assets,
 - swap multiple assets, and
 - swap out a failed component.
-

Definitions

We will be using the following definitions in this chapter:

- A *swap* is the replacement of one asset with another.
 - A *move* is the changing of an asset from its current location to a new location.
 - A *mass move* is the changing of more than one asset from one location to a new location.
-

Work Orders

Introduction

When carrying out moves, mass moves, and swaps, the work and subsequent completion of that work is usually documented through the Service Desk module. However, some companies might decide to use the Work Orders module to manage IT work requirements. In this section, we will provide the basics of the Work Order Tracking application.

The Work Order Tracking Application

The Work Order Tracking application is used to plan, review, and approve work orders for assets and locations. When you create a work order, you initiate the work process and create a historical record of work being performed.

Work Order Tracking Tabs

The Work Order Tracking application has eight tabs. The following table describes those tabs.

Use this tab...	To...
List	Search the database for a specific record or group of records that meet your criteria.
Work Order	Create, plan, review, and approve work orders. On this tab, you process work orders created with the Work Order Tracking application, as well as those created or generated by other Maximo applications.
Plans	View, enter, and modify several types of work plan data on a work order. A work plan describes the tasks, labor, materials, services, and tools needed to complete the work. You enter information about estimated labor, materials, services, and tools needed to carry out a work plan on the Labor, Material, Services, and Tools subtabs.
Related Records	Link the selected work order to other work orders and tickets, and view work orders and tickets already related to the selected work order. You also can delete the relationship between a work order and a related record if the relationship type is Related.

continued on next page

Work Orders continued

Work Order Tracking Tabs continued

Use this tab...	To...
Actuals	<p>Enter, view, and modify the actual job tasks, labor, materials, and tools used on the work order.</p> <p>To report actual labor, material, and tool use, click on the appropriate subtab. You can then use dialog boxes available from the subtabs to copy plan data, or insert different or additional information on use. When you report actuals, you can modify fields until you save the record. Only approved labor is used in calculating actuals for labor hours and costs.</p>
Safety Plan	Add, view, or modify safety information on a work order.
Log	<p>View and create entries about the current record.</p> <p>The Log tab has the following subtabs:</p> <ul style="list-style-type: none"> • Work Log to add work log entries for the current record, and to view work log entries for all originating and follow-up records for the current record. • Communication Log to view inbound and outbound communications for the current record; to view any attachments that are associated with a communication. The Communication Log is read-only.
Failure Reporting	Record and view asset and location problems, causes, and remedies. This data enables you to identify trends and isolate probable causes of breakdowns.

continued on next page

Work Orders continued

Exercise:
Creating a Work
Order in the
Work Order
Tracking
Application



In the following exercise, we will create a work order for swapping out a primary hard drive on one of the computers in the organization. To create a work order, complete the following steps.

Step	Action
1	Open the Work Order Tracking application.
2	Click New Work Order .
3	Enter Change Out Primary Hard Drive in the Description field.
4	Enter 9001 in the Asset field. <div data-bbox="691 921 1183 1226" style="text-align: center; margin: 10px 0;"> </div> <p><u>Result:</u> Maximo displays a message informing you that a warranty exists on this asset.</p>
5	Click OK .

continued on next page

Work Orders continued

Exercise: continued
Creating a Work Order in the Work Order Tracking Application

Step	Action												
6 	Enter 3 in the Priority field. <u>Note:</u> The Priority field indicates the importance of the work order. Priorities can range from 0–999, where 0 is the lowest priority and 999 is the highest.												
7 	Click on the Plans tab. <u>Note:</u> You can also apply an existing job plan to the work order by entering the number in the Job Plan field.												
8	Use New Row to enter the following five tasks: <table border="1" data-bbox="532 989 1451 1241"> <thead> <tr> <th><u>Description</u></th> <th><u>Estimated Duration</u></th> </tr> </thead> <tbody> <tr> <td>Take Server Offline</td> <td>:10</td> </tr> <tr> <td>Migrate Primary HD Data to New Drive</td> <td>1:00</td> </tr> <tr> <td>Install New Drive</td> <td>:30</td> </tr> <tr> <td>Carry Out Performance Test Routine</td> <td>1:00</td> </tr> <tr> <td>Restore Online Status</td> <td>:30</td> </tr> </tbody> </table>	<u>Description</u>	<u>Estimated Duration</u>	Take Server Offline	:10	Migrate Primary HD Data to New Drive	1:00	Install New Drive	:30	Carry Out Performance Test Routine	1:00	Restore Online Status	:30
<u>Description</u>	<u>Estimated Duration</u>												
Take Server Offline	:10												
Migrate Primary HD Data to New Drive	1:00												
Install New Drive	:30												
Carry Out Performance Test Routine	1:00												
Restore Online Status	:30												
9	Save the record.												

continued on next page

Work Orders continued

The Plans Subtabs

The Plans tab has four subtabs on which you can enter Labor, Materials, Tools, and Services. The following table describes each of those tabs.

Use this subtab...	To...
Labor	Insert, view, or edit planned labor. If the work order has a job plan, Maximo copies all tasks and plan data from the job plan to the work plan. When you enter labor or craft information, Maximo displays the labor or craft's description and rate.
Materials	Insert, view, or edit planned materials or items for a work order. If the work plan is based on a job plan, Maximo copies all tasks and plan data from the job plan to the work plan.
Services	View services and add line types of Service or Standard Service (STD SERVICE) to the work plan.
Tools	Insert, view, or edit planned tool requirements for a work order. The Select Tools dialog box allows you to apply multiple tools at one time to a work order. When the work order is approved, Maximo reserves the tools if they are in a storeroom. If the work plan is based on a job plan, Maximo copies all tasks and plan data from the job plan to the work plan.

continued on next page

Work Orders continued

Exercise: Adding Labor and Materials



In this exercise we will add labor and materials to the work order we just created.

Step	Action																																																																																
1	With the work order you created in the previous exercise open, make sure you are on the Plans tab.																																																																																
2	On the Labor subtab, click Select Craft . <u>Result:</u> The Select Craft dialog box opens.																																																																																
	<table border="1"> <thead> <tr> <th>Craft</th> <th>Skill Level</th> <th>Vendor</th> <th>Contract</th> <th>Standard Rate</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> CARP</td> <td>FIRSTCLASS</td> <td></td> <td></td> <td>18.00</td> </tr> <tr> <td><input type="checkbox"/> ELECT</td> <td></td> <td></td> <td></td> <td>17.00</td> </tr> <tr> <td><input type="checkbox"/> ELECT</td> <td>FIRSTCLASS</td> <td></td> <td></td> <td>22.00</td> </tr> <tr> <td><input type="checkbox"/> ELECT</td> <td>SECONDCLASS</td> <td></td> <td></td> <td>19.00</td> </tr> <tr> <td><input type="checkbox"/> ELECT</td> <td>APPRENTICE</td> <td></td> <td></td> <td>16.00</td> </tr> <tr> <td><input type="checkbox"/> CONSTR</td> <td></td> <td></td> <td></td> <td>16.00</td> </tr> <tr> <td><input type="checkbox"/> CONSTR</td> <td>FIRSTCLASS</td> <td></td> <td></td> <td>16.00</td> </tr> <tr> <td><input type="checkbox"/> DRIVER</td> <td></td> <td></td> <td></td> <td>14.50</td> </tr> <tr> <td><input type="checkbox"/> DRIVER</td> <td>FIRSTCLASS</td> <td></td> <td></td> <td>17.00</td> </tr> <tr> <td><input type="checkbox"/> INSPECT</td> <td></td> <td></td> <td></td> <td>19.00</td> </tr> <tr> <td><input type="checkbox"/> INSPECT</td> <td>LEVEL_1</td> <td></td> <td></td> <td>24.00</td> </tr> <tr> <td><input type="checkbox"/> LUB</td> <td></td> <td></td> <td></td> <td>14.00</td> </tr> <tr> <td><input type="checkbox"/> LUB</td> <td>FIRSTCLASS</td> <td></td> <td></td> <td>17.00</td> </tr> <tr> <td><input type="checkbox"/> LUB</td> <td>APPRENTICE</td> <td></td> <td></td> <td>13.75</td> </tr> <tr> <td><input type="checkbox"/> MACH</td> <td></td> <td></td> <td></td> <td>18.00</td> </tr> </tbody> </table>	Craft	Skill Level	Vendor	Contract	Standard Rate	<input checked="" type="checkbox"/> CARP	FIRSTCLASS			18.00	<input type="checkbox"/> ELECT				17.00	<input type="checkbox"/> ELECT	FIRSTCLASS			22.00	<input type="checkbox"/> ELECT	SECONDCLASS			19.00	<input type="checkbox"/> ELECT	APPRENTICE			16.00	<input type="checkbox"/> CONSTR				16.00	<input type="checkbox"/> CONSTR	FIRSTCLASS			16.00	<input type="checkbox"/> DRIVER				14.50	<input type="checkbox"/> DRIVER	FIRSTCLASS			17.00	<input type="checkbox"/> INSPECT				19.00	<input type="checkbox"/> INSPECT	LEVEL_1			24.00	<input type="checkbox"/> LUB				14.00	<input type="checkbox"/> LUB	FIRSTCLASS			17.00	<input type="checkbox"/> LUB	APPRENTICE			13.75	<input type="checkbox"/> MACH				18.00
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3	Filter for and select NETWORK , and then click OK . <u>Result:</u> The labor is added.																																																																																
4	Enter 4:05 in the Regular Hours field.																																																																																
5	Click on the Materials subtab.																																																																																
6	Click Select Materials .																																																																																
7	Search for and select HD4532 and then click OK . <u>Result:</u> The material is added.																																																																																
8	Click the Direct Issue? check box.																																																																																
9	Save your work order.																																																																																

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Work Orders continued

**Note on
Direct Issue?
Check Box**



The Direct Issue? check box specifies whether you obtain the item directly from a purchase or from a storeroom. If you clear the check box (the default), you obtain the item from a storeroom and you must enter a value in the Storeroom field. When the work order is approved, Maximo reserves the item in inventory. If you select the check box, the item will be purchased for the approved work order when you use Reorder Direct Issue Items/Services in the Inventory application. You can edit this field if the work order's status allows work plan materials edits. Work order editing rules are set up in the Organizations application.

Moves

Rules for Moves

Here are some rules you should remember about moves and mass moves:

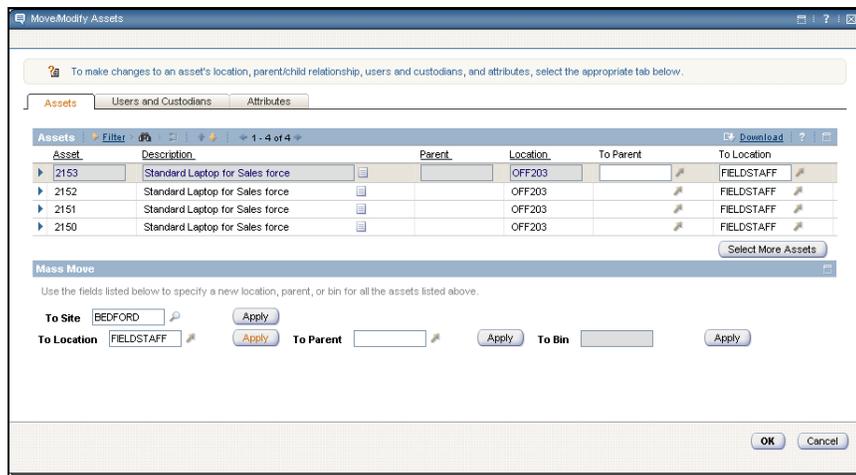
- You can move a single asset the same way you perform a mass move by choosing just one asset.
 - You can only use the Move/Modify Assets dialog box to move an asset from a non-inventory location. That is, you cannot move an asset from a storeroom. You have to use the Issues and Transfers application to transfer an asset from a storeroom to another location. However, you can move an asset from a non-inventory location to either another non-inventory location or a storeroom.
 - You can move assets within your current site, to another site within your organization, or to a site in a different organization.
 - You cannot move an asset to a storeroom in another site unless the item already exists in the storeroom to which you are moving the item. If it does not exist, you must first create the item in the Item Master application.
 - If there is an open work order for an asset, you cannot move it unless you close or cancel the work order.
-

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Moves continued

Move/Modify Assets Dialog Box

There are two different move actions in Maximo. The Move/Modify Asset (singular) action is available in the Activities, Changes, and Releases applications and allows you to plan a move but execute it at a later date. The Move/Modify Assets (plural) action is available in the Assets, Purchase Orders, and Work Order Tracking applications and does not allow you to plan, but does allow you to modify users and custodians. For this section, we will be using the Move/Modify Assets (plural) action from the Assets application.



The following table describes some of the fields on the Move/Modify Assets dialog box:

Use this field...	To...
To Site	Move the asset to a new site. If the site to which you want to move the asset already has an asset with the same asset identifier, Maximo prompts you to assign a new asset identifier to the asset you are moving. Every asset in a site must have a unique identifier.
To Location	Move the asset to a new location.
To Parent	Move the asset to a new parent.
To Bin	Move the asset to a new bin.

Mass Moves

Introduction

Often, groups of IT assets are moved to a new location. They might be freshly configured, updated, or have new software loaded, and need to be moved to various departments or locations. The asset manager needs an easy way to move many assets at once. In this exercise scenario, we have decided that five of the laptops we ordered for the sales force are going to be given to the training department located in Bedford. Therefore, we will move some of the assets we received in the previous chapter from the FIELDSTAFF location to Office #203.

Exercise: Mass Moves



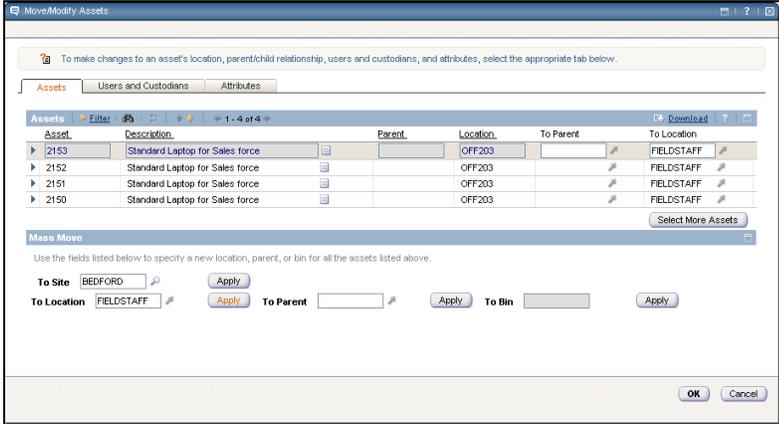
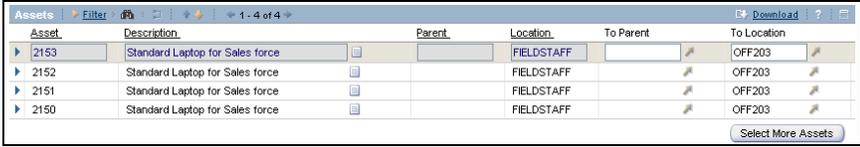
To perform a mass move, complete the following steps.

Step	Action
1	Go to the Assets application.
2	Enter FIELDSTAFF in the Location field, and D601 in the Rotating Item field. <u>Result:</u> All of the assets fitting your search criteria are listed.
3	Select the check box next to each of the assets.

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Mass Moves continued

Exercise: continued
Mass Moves

Step	Action
4	<p>Click the Move/Modify Assets  button or select Move/Modify Assets from the Select Action menu.</p> <p><u>Result:</u> The Move/Modify Assets dialog box opens.</p>  <p> <u>Note:</u> If you wanted, you could add more assets to move by clicking Select More Assets.</p>
5	<p>Enter OFF203 in the To Location field in the Mass Move section of the screen.</p>
6	<p>Click Apply.</p> <p><u>Result:</u> The To Location field for each of the assets is changed to OFF203.</p>  <p>Keep this dialog box open to use in the next exercise.</p>

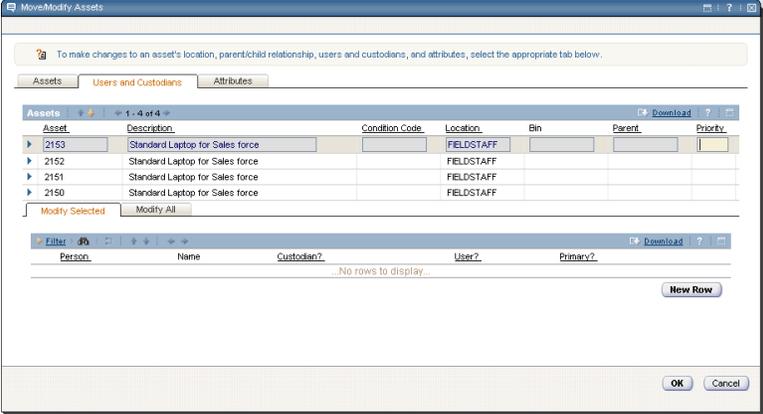
continued on next page

Mass Moves continued

Exercise: Assigning Users to Assets



In this exercise, we will assign users to each of our laptops.

Step	Action
1	<p>Click the Users and Custodians tab.</p> <p><u>Result:</u> The Users and Custodians tab opens.</p>  <p> <u>Note:</u> The Modify Selected tab allows you to assign a user/custodian to each asset individually. The Modify All tab allows you to assign a user/custodian for all of the listed assets.</p>
2	<p>With the first asset highlighted, click New Row on the Modify Selected tab.</p> <p><u>Result:</u> Maximo displays the Person details.</p>
3	<p>Search for and select Julie Daniels.</p>
4	<p>Click to select both the Custodian? and the User? check boxes.</p>
5	<p>Add a user and custodian to each of the remaining assets by highlighting the asset and clicking New Row.</p>
6	<p>When you have finished, click OK.</p> <p><u>Result:</u> The users are assigned to the assets.</p>

Moving Assets to Different Locations

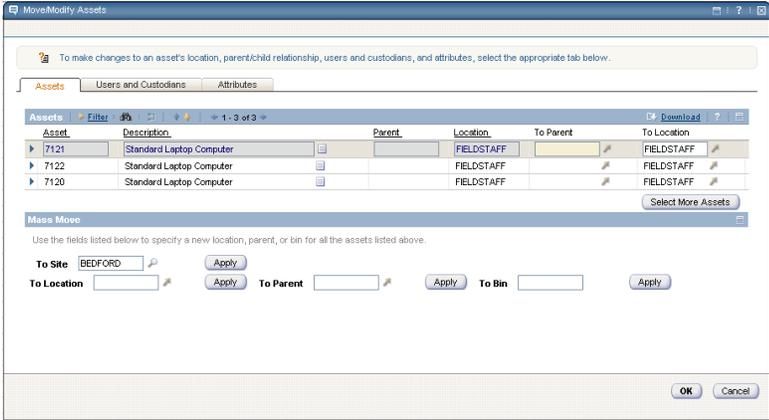
Introduction

An asset manager routinely must move a group of assets from one location to others (such as to different departments) and needs to record the changes. This exercise will teach you how to perform the multiple moves and how to view the transactions that occur as a result of the moves.

Exercise: Moving Assets to Different Locations

To move assets to different locations, complete the following steps.



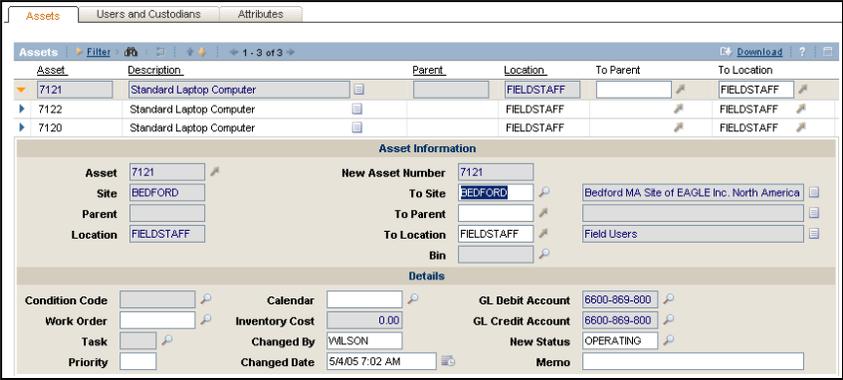
Step	Action
1	On the List tab in the Assets application, enter D600 in the Rotating Item field, then click on the Filter Table  button. <u>Result:</u> Your search results are listed.
2	Click in the Select Records check box.
3	Select records 7120 , 7121 , and 7122 . <u>Note:</u> If you are in a shared database environment, your instructor will assign you the assets to select.
4	Click the Move/Modify Assets  button or select Move/Modify Assets from the Select Action menu. <u>Result:</u> The Move/Modify Assets dialog box opens. 

continued on next page

Moving Assets to Different Locations continued

Exercise: Moving Assets to Different Locations

continued

Step	Action
5	<p>Click the View Details icon next to the first asset number. Result: The details for the asset expand.</p> 
6	<p>Click the Detail Menu button next to the To Location field, and choose Select Value.</p>
7	<p>Select BOSTON. Note: If you select a storeroom location and the item does not exist in that storeroom, you will receive an error message indicating that you must add the item to that storeroom before you can move it to that location.</p>

continued on next page

Moving Assets to Different Locations continued

Exercise: continued
Moving Assets
to Different
Locations

Step	Action
8	Change the locations for the other two assets. They can be any locations you want.
9	Assign users and/or custodians to each of the assets. Delete the current user/custodian.  <u>Note:</u> You cannot delete a primary custodian until you add a new one.
10	When you are finished, click OK .

Swaps

Introduction

It is common for an asset manager to need to exchange one asset with another. One simple and common example is when an asset fails, and a replacement is installed.

Rules for Swaps

You use the Swap Assets action to replace one asset with another, and to specify a location for the asset you swap out. As with moves, you cannot swap rotating assets from inventory locations. You can verify the transaction by looking at the move history of the two assets that were involved in the swap.

The following rules apply to swapping assets:

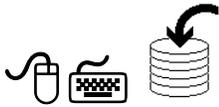
- You can swap rotating assets from one organization to another only if both organizations use the same item set.
 - If the replacing asset from another site or organization has the same asset identifier as an asset in your current site, Maximo prompts you to assign a new asset identifier to the replacing asset. Every asset in a site must have a unique identifier.
 - You cannot use the Swap Assets action to move rotating assets from inventory locations; you must issue or transfer rotating assets using the Inventory applications.
 - The ability to swap assets to and from another site or organization depends on your security authorization.
 - If the outgoing asset has a parent, it will be moved to the location that you specify in the **To Location** field and will no longer have a parent. The replacing asset would now be the child of the outgoing asset's former parent and the location will now be the parent's location. You cannot swap a parent if it has dependents, unless you are swapping it with another parent that has equal dependents.
 - Though the swap is performed in one step, Maximo actually performs two transactions behind the scenes to accurately reflect the asset moves: one transaction for the outgoing asset and the other one for the replacing asset.
-

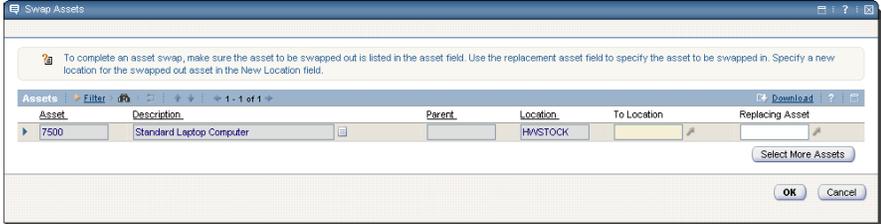
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Swaps continued

Exercise:
Swap an Asset

To swap assets, complete the following steps.

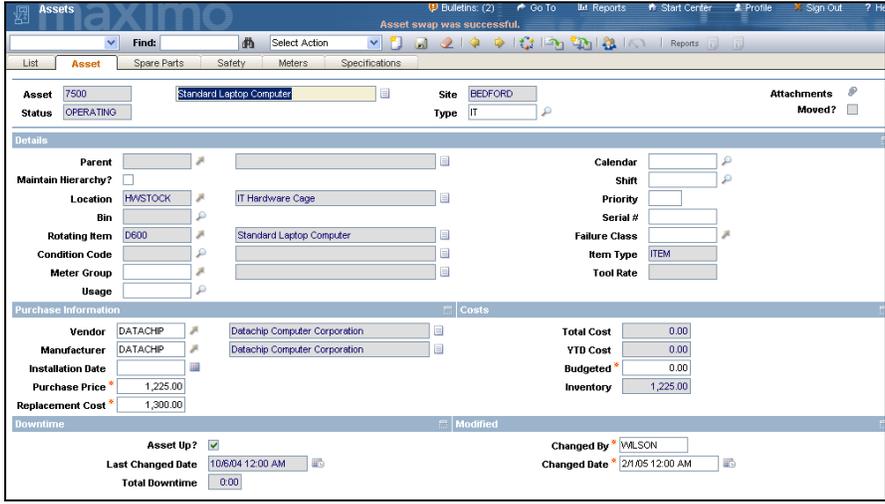
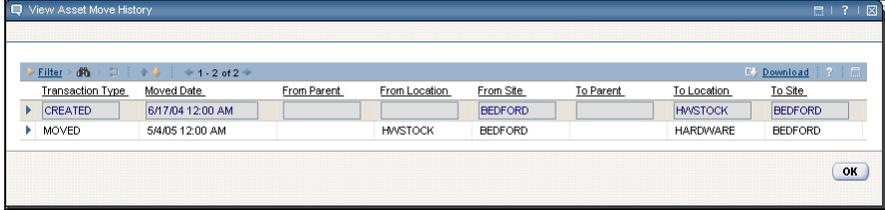


Step	Action
1	From the Assets application, search for and select asset 7500 . This is the asset we will be replacing (swapping out).
2	<p>Click the Swap Assets  icon or select Swap Assets from the Select Action menu.</p> <p><u>Result:</u> The Swap Assets dialog box opens.</p> 
3	Enter 7501 in the Replacing Asset field. This is the asset that will be replacing 7500.
4	Enter HARDWARE in the To Location field. This is where we will move the outgoing asset.

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Swaps continued

Exercise: continued
Swap an Asset

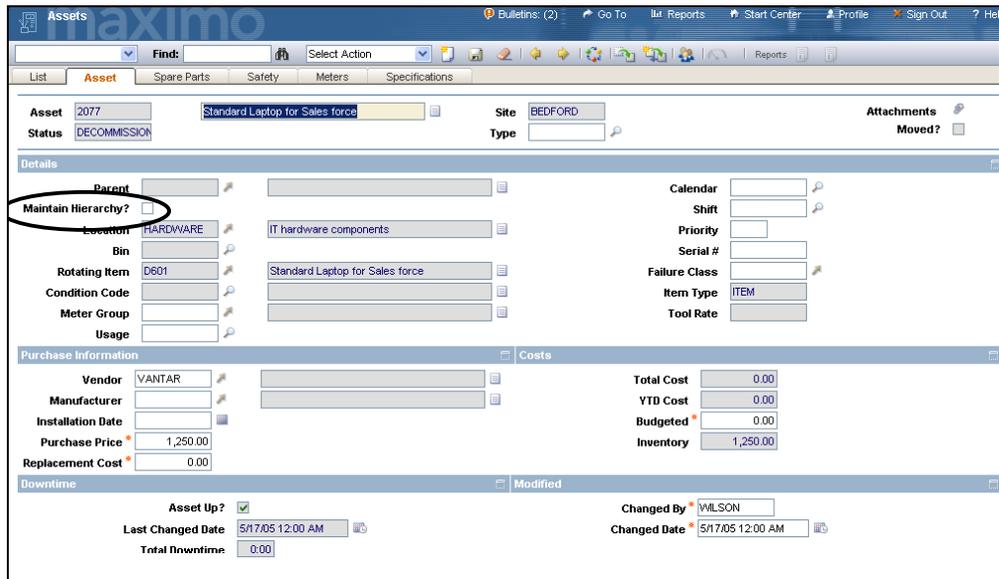
Step	Action
5	<p>Click OK.</p> <p><u>Result:</u> Asset 7501 has replaced asset 7500, and 7500 has moved to the HARDWARE location.</p> 
6	<p>To verify the transaction, choose View Asset Move History from the Select Action menu.</p> <p><u>Result:</u> The View Asset Move History dialog box opens.</p> 
7	When you are finished viewing the history, click OK .
8	Search for and select asset 7501 .
9	View its move history.

Bundling Assets

Bundling Assets

Sometimes when items are acquired, as through a lease contract, you are required to track the items as an indivisible group of assets, that is, they must not be reconfigured. For example, you purchase a laptop from Dell and it comes with a mouse, a removable DVD drive, a removable floppy disk drive, and MS Office Suite. In this case, you would also apply an item assembly structure; however, you would need to check the **Maintain Hierarchy ?** check box on the **Asset** tab in the **Assets** application to the parent of the hierarchy.

In addition, IT asset management also requires bundling within configuration management, whereby the “bundle” could be configured/reconfigured with other assets during its lifecycle.

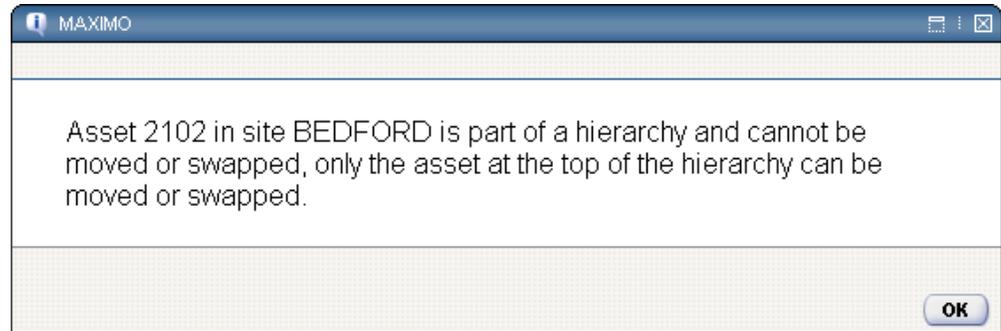


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Bundling Assets continued

Moving Bundled Assets

If the **Maintain Hierarchy?** check box is checked, you can still perform a move or swap on the parent asset, but you cannot perform a move or a swap on its children. If you try to do so, you will receive an error similar to the following example.



If you want to move or swap the child asset in the hierarchy, you must clear the **Maintain Hierarchy?** check box, and then move the child asset.

In addition, if you want to add a child to a bundled parent, you must also clear the **Maintain Hierarchy?** check box, add the child, and then re-check the **Maintain Hierarchy?** check box.

Viewing Associated Contracts

Introduction

Before you complete a move or a swap, you might want to determine if there are any contracts that apply to the asset. As we discussed in the Contracts chapter, many assets are procured, leased, or serviced by contractual agreements. They might be purchased under purchasing contracts, or leased under lease rental contracts. They might be serviced via labor or service contracts, and protected under warranty contracts. Needless to say, asset managers would benefit from a way to quickly determine which contracts apply to any asset before moving it to another location. In the next exercise, we will learn how to view the contracts associated with an asset.

Exercise: Viewing Associated Contracts



To view contracts associated with an asset, complete the following steps.

Step	Action
1	In the Assets application, search for and select asset 9010 .
2	Select View Contracts from the Select Actions menu. <u>Result:</u> Maximo displays the contracts associated with this asset. <div data-bbox="509 1182 1390 1383" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> </div>
3	When you are finished viewing the contracts, click OK .

Chapter Summary

Moves

There are two different move actions:

- The **Move/Modify Asset** action, available in the Activities, Changes, and Releases applications
- The **Move/Modify Assets** (plural) action, available in the Assets, Purchase Orders, and Work Order Tracking applications.

You cannot move an asset *from* a storeroom location. However, you can move an asset *to* a storeroom location.

Mass Moves

Mass moves are performed the same way as single asset moves, but you are choosing more than one asset.

Swaps

A swap occurs when you exchange an asset with another.

A swap is performed in one step. However, Maximo performs two transactions behind the scenes: one transaction for the outgoing asset and the other one for the replacing asset.

Workshop

Exercise



In this exercise, we are going to replace an old server with a new one.

Perform the following swap:

Replace asset **A8008** with asset **A8007**. Send **A8008** to the **HARDWARE** location.

Note: If you are in a single-database environment, your instructor will give you a different asset number to replace.

Review Questions

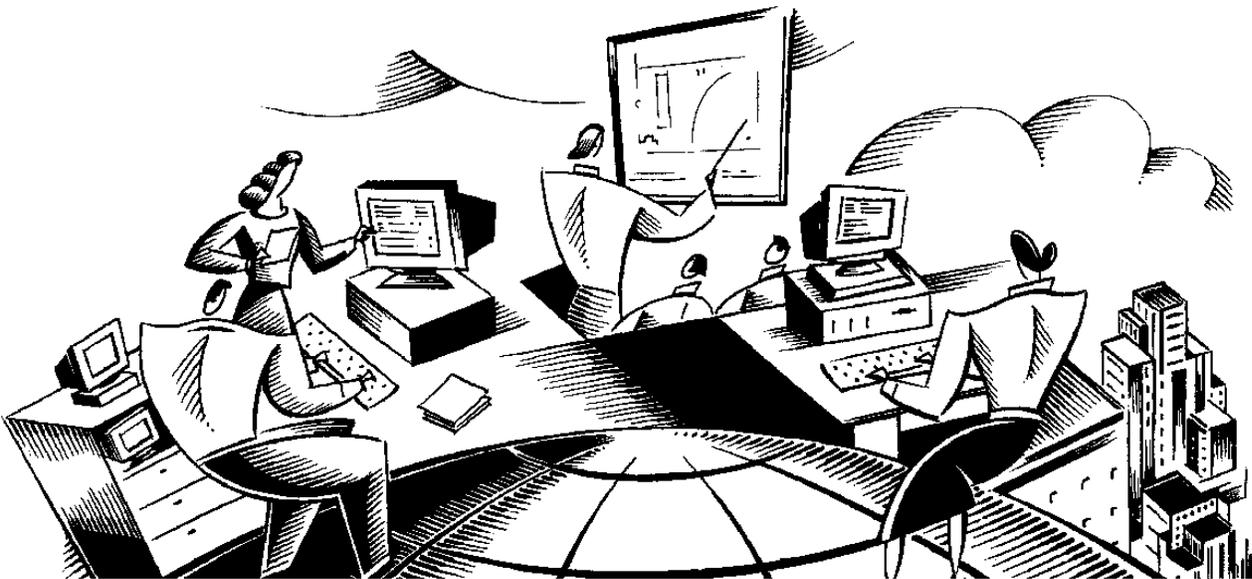
Review Questions



1. How does the **Maintain Hierarchy?** check box affect bundled assets?
 2. What will happen if you try to replace an asset from another site or organization with an asset from a different site that has the same identifier?
-

IT Asset Configuration and Management in MXES

Unit 5: Maintaining Assets



In This Unit

This unit contains the following chapters:

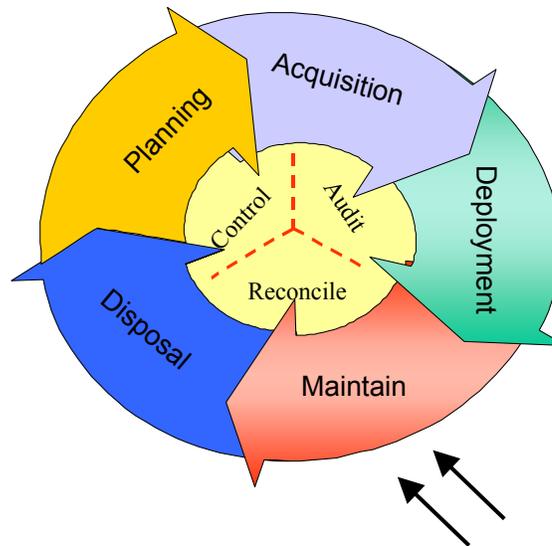
Chapter	Subject
9	Deployed Assets

Unit Purpose

The purpose of this unit is to provide you with instruction on how Maximo supports IT maintenance, along with hardware and software compliance.

Maintaining Assets and the IT Lifecycle

Maintaining Assets and the IT Lifecycle



We have gone through the planning, acquisition, and deployment phases, and we are now ready for the fourth phase: maintaining, or keeping track of, the assets.

Maintaining Assets

Effectively monitoring your software and hardware usage is key to optimizing your usage and minimizing costs. In addition, keeping track of your deployed assets allows you to maintain software and hardware compliance. Through Maximo Discovery, Maximo Fusion, and the Maximo Deployed Assets module, you can keep track of not only every asset on your network, but also all the specific information that applies to each asset.

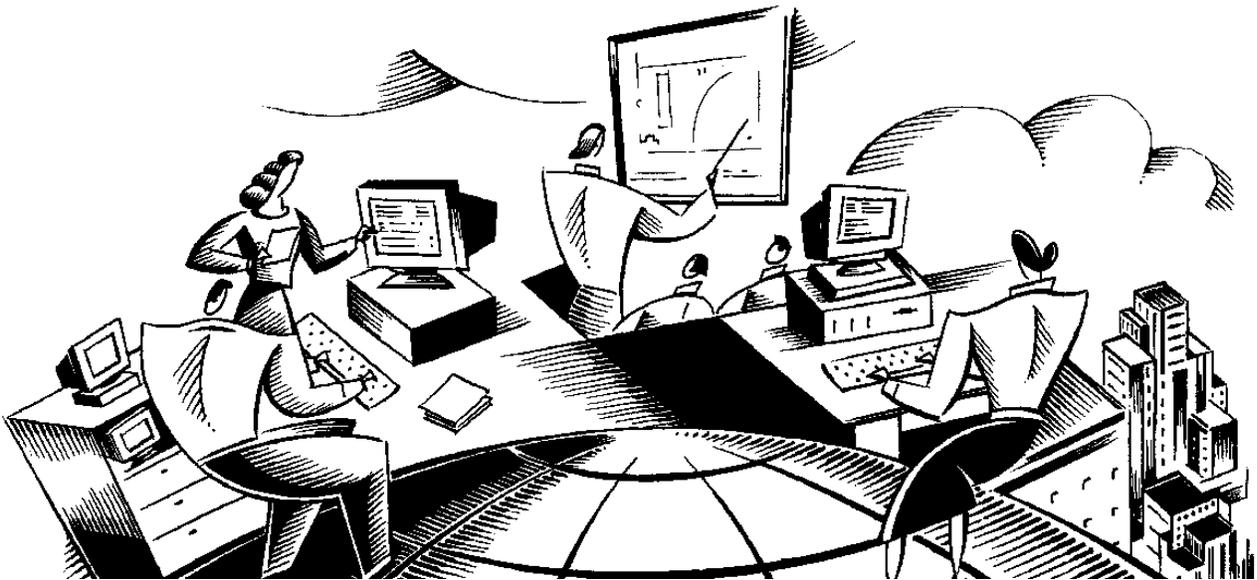
Unit Scenario

Scenario

In this unit we will learn how to use the Maximo Discovery tool to locate our deployed assets (both hardware and software) on the network. In addition, we will migrate that data into the Maximo database. Finally, we will view the collected data using the Deployed Assets module in Maximo.

IT Asset Configuration and Management in MXES

Chapter 9: Deployed Assets



In This Chapter

This chapter contains the following topics:

Topic	See Page
Chapter Overview	9-1
Maximo Discovery	9-2
Discovery Control Center	9-3
Creating Discovery Schedules	9-4
Attaching Discovery Schedules	9-7
Removing Discovery Schedules	9-9
Updating Discovery Schedules	9-10
Requesting an Audit on Demand	9-12
Viewing Audit Results	9-14
Fusion	9-24
Deployed Assets	9-28
The Computers Application	9-29
Viewing Discovered Computer Data in Maximo	9-30
The Computers Application Tabs	9-31
Reconciliation	9-36
Asset Details	9-38
Chapter Summary	9-40
Workshop	9-41
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Chapter Overview

Introduction

Large organizations are constantly updating their staff with new and improved IT devices and software. In order to take full advantage of procurement policies, software licenses, lease contracts, and more, organizations must have the tools to discover what is deployed out on their network, and be able to compare their findings with what theoretically should be found out on the network.

Maximo provides an extremely versatile, end-to-end solution to solve this IT maze. This chapter focuses on the execution of this multi-phased approach to better understand and use your IT assets. The phases incorporated in this approach include:

1. Discovery phase – the setup and execution of the network discovery tool Maximo Discovery
2. Interpretation of the findings of the Maximo Discovery data
3. The mapping of Maximo Discovery (or other discovery tools) via Fusion and the appropriate cartridge
4. The migration of this data into the Maximo Deployed Assets module via Fusion
5. The establishment of a link between discovered node and authorized parent asset
6. The comparison of the Deployed Asset data versus the Authorized Asset data

Chapter Focus

In this chapter, we will focus on the Discovery, Fusion, and Deployed Assets applications. This chapter will provide a basic overview of the applications. For more complete and detailed explanations of the features and functions, see the appropriate user's guide.

Learning Objectives

When you have completed this chapter, you should be able to:

- use the Maximo Discovery tool,
 - interpret Maximo Discovery data,
 - use Fusion to migrate the data into the Maximo Deployed Assets module, and
 - view Deployed Assets data.
-

Maximo Discovery

Maximo Discovery

A large part of managing a dynamic IT department is knowing where your assets are, and their current configuration. It is important to know what changes have taken place over time with the asset configuration (for example, memory has been increased, a higher-capacity hard drive was installed, and so forth). This process has multiple steps, the first being to “discover” how the assets are currently configured out on the network or in the field. Maximo Discovery is the tool that performs the “sniffing” operation to harvest the configuration details. This section discusses reviewing the properties that have been detected by Maximo Discovery. This review will occur from within Maximo Discovery, prior to the details being mapped into Maximo. Maximo Discovery is only one of a number of industry-leading network discovery products available.

Audits

An audit provides information about the servers and computers in your organization. The results of an audit are stored in the Repository and viewed in the Discovery Control Center. As you perform more audits, the results build up as an audit history, so that you have a picture of changes over a period of time.

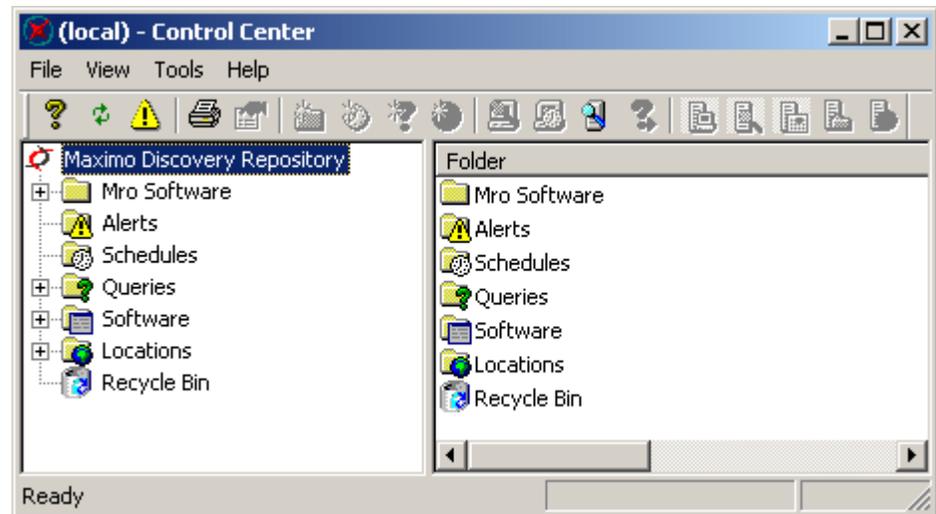
You can perform audits manually or automatically. A manual audit is one that is performed on demand, while an automatic audit is one that is scheduled for a particular time (for example, every week on a Friday). In this section, we will practice doing both.

You can also audit one or more computers at any time. When you elect to audit a computer, its status is set to Audit Requested and the audit is performed as soon as the computer is available.

Discovery Control Center

The Control Center

Discovery processes are controlled through the Control Center. The Control Center screen is divided into two panes: Tree Control on the left and, on the right, the Contents Window. The Control Center issues messages to the Client Agent, which performs the auditing. Messages from the Client Agent are returned to the Server Agent, which updates the Repository.

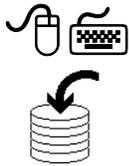


Creating Discovery Schedules

Schedules

As mentioned previously, you can create audit schedules so that Discovery will run audits at specific times. Discovery makes it straightforward to create schedules by using the Schedule wizard. A schedule automates the process of performing audits.

Exercise: Creating a Schedule



To create a schedule, complete the following steps.

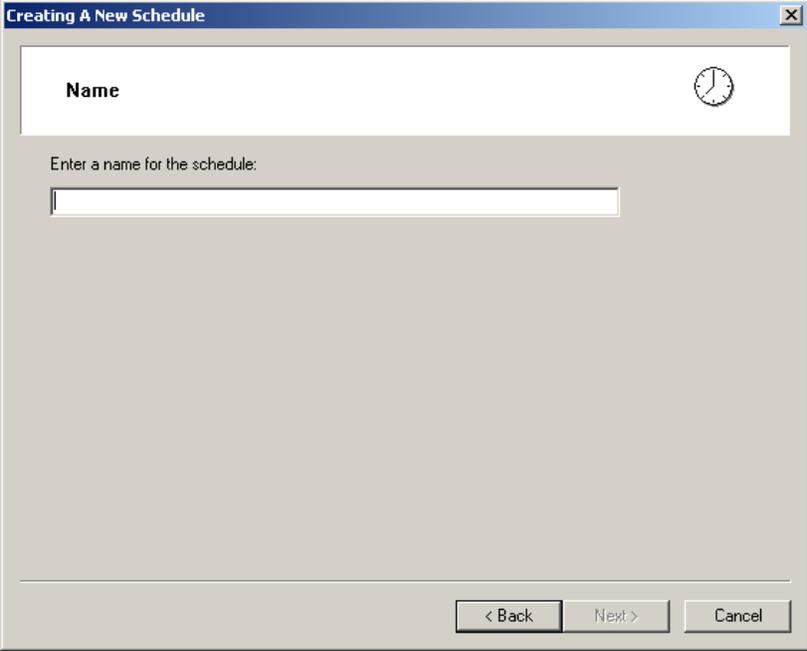
Step	Action
1	<p>Open the Discovery Control Center. <u>Result:</u> The Control Center main screen opens.</p> 
2	Select the Schedules folder.

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Creating Discovery Schedules continued

Exercise: Creating a Schedule

continued

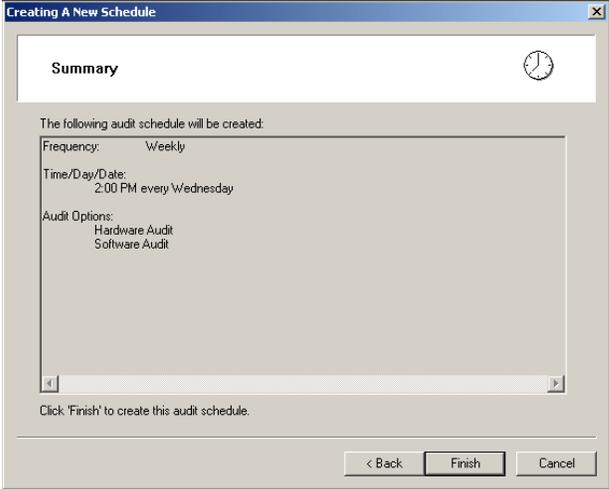
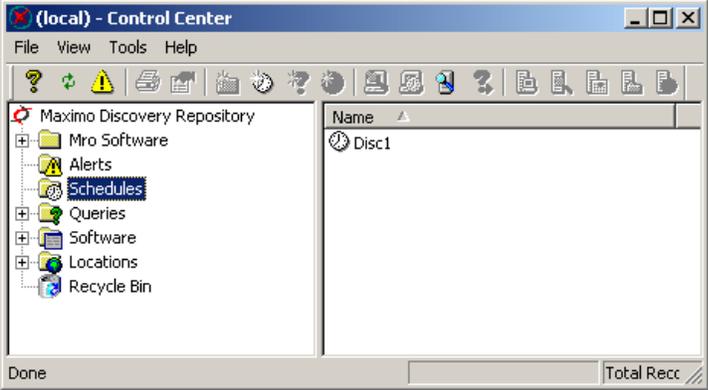
Step	Action
3	<p>From the File pull-down menu, select New, then Schedule. <u>Result:</u> The Creating a New Schedule wizard opens.</p> 
4	Enter Disc1 for the name of this schedule, then click Next .
5	Select Weekly for the schedule frequency, then click Next .
6	<p>Enter 2:00 PM in the Specific time field, and select Wednesday for the Day of week field. <u>Result:</u> Our audit will be every Wednesday at 2:00 PM.</p>
7	Click Next .

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Creating Discovery Schedules continued

**Exercise:
Creating a
Schedule**

continued

Step	Action
8	<p>Keep the Hardware audit and Software audit fields selected, then click Next.</p> <p><u>Result:</u> A summary screen opens.</p> 
9	<p>Click Finish.</p> <p><u>Result:</u> The new schedule is created and displayed in the Schedules folder.</p> 

Attaching Discovery Schedules

Attaching a Schedule

To use a schedule, you must attach it to the organization units, locations, and/or computers to which you want this schedule to apply. When a computer is moved (in Discovery) to an organizational unit that has a schedule attached, that schedule is automatically attached to the computer and you do not need to do this manually.

You can attach a schedule to one computer, to all the computers in an organizational unit, to all the computers in a location, or to a remote computer via e-mail. In the following exercise, we will learn how to attach a schedule to an organizational unit.

Exercise: Attaching a Schedule to an Organizational Unit



To attach a schedule to an organizational unit, complete the following steps.

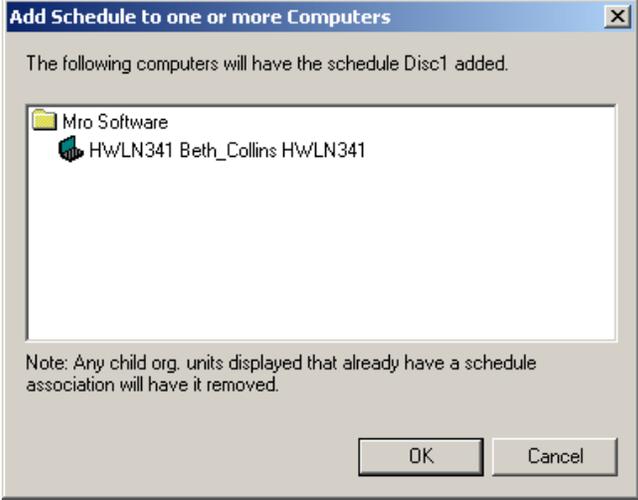
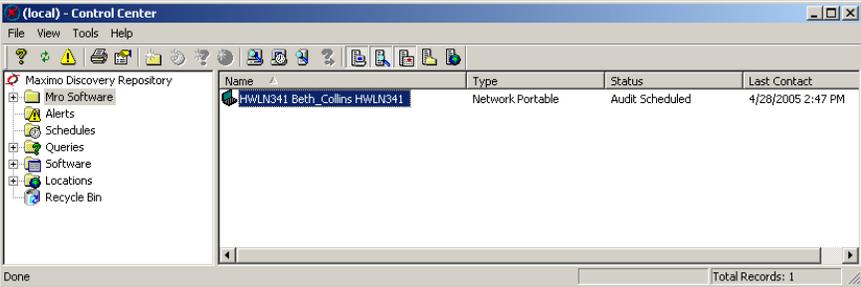
Step	Action
1	With the Control Center open, click on Mro Software in the left pane.
2	From the File pull-down menu, select Client , then Add Schedule . <u>Result:</u> The Select Schedule screen opens. <div data-bbox="695 1045 1377 1518" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> </div>

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Attaching Discovery Schedules continued

**Exercise:
Attaching a
Schedule to an
Organizational
Unit**

continued

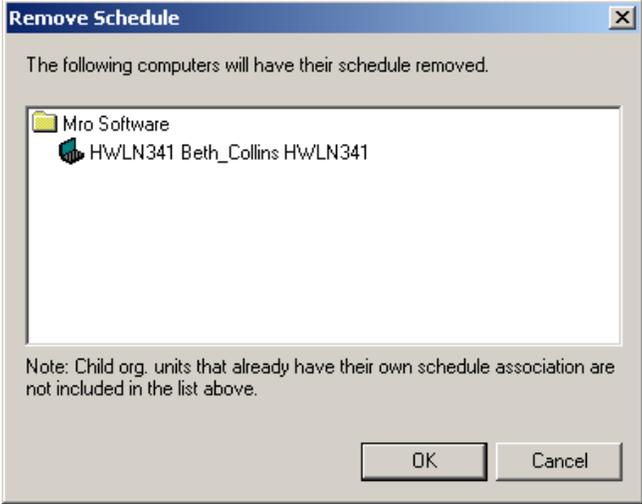
Step	Action
3	<p>Select Disc1, then click OK. <u>Result:</u> The Add Schedule confirmation dialog box opens.</p>  <p><u>Note:</u> If you had clicked the New Schedule button instead of the OK button, Maximo would have launched the Creating a New Schedule wizard.</p>
4	<p>Click OK. <u>Result:</u> The status of the selected computers is changed to Schedule Update Pending. The schedule is sent to the Client Agent on the selected computers. When each computer is updated with the schedule, a confirmation message is returned and the status is updated to Audit Scheduled in the Control Center.</p>  <p><u>Note:</u> To view the new status, you must quit Control Center and then start it again.</p>

Removing Discovery Schedules

Exercise: Removing a Schedule from an Organizational Unit



You can remove a schedule from one or all of the computers in an organizational unit. To remove a schedule from an organizational unit, complete the following steps.

Step	Action
1	With the Control Center open, click on Mro Software in the left pane.
2	<p>From the File pull-down menu, select Client, then Remove Schedule.</p> <p><u>Result:</u> The Remove Schedule confirmation dialog box opens.</p> 
3	<p>Click OK.</p> <p><u>Result:</u> The status of the selected computer(s) is changed to Schedule Change Pending. A cancellation message is sent to the Client Agent on the computer(s) and the schedule is removed as soon as the computer(s) is available. When each computer has removed the schedule, a confirmation message is returned and the status is updated to Registered in the Control Center.</p>

Updating Discovery Schedules

Exercise:
Updating a
Schedule

You can modify a schedule at any time by completing the following steps.



Step	Action
1	In Control Center , click the Schedules folder to select it.
2	Right-click on Disc1 , then select Properties . <u>Result:</u> The Schedule Properties screen opens. <div data-bbox="618 821 1284 1562" style="border: 1px solid gray; padding: 10px; margin: 10px auto; width: fit-content;"> </div> <p><u>Note:</u> On this tab you can change the audit options.</p>
3	Click on the Occurrence tab.
4	Change Frequency to Monthly .

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Updating Discovery Schedules continued

Exercise:
Updating a
Schedule

continued

Step	Action
5	<p>Click OK.</p> <p><u>Result</u>: Maximo displays a confirmation screen.</p> 
6	<p>Click Yes.</p> <p><u>Result</u>: The status of the updated computers is changed to Schedule Update Pending and the new schedule is sent to these computers. Subsequently, when the Server Agent receives a message from each of these computers that the client computer copy of the schedule has been updated, the status of the computer is updated to Audit Scheduled.</p>

Requesting an Audit on Demand

Requesting an Audit on Demand

You can request that one or more computers be audited on demand. This manual procedure can be used in conjunction with Audit Schedules. The number of computers that can be audited is completely flexible. You can select a single computer or an organizational unit or location. If you select an organizational unit or location, all of the computers in the organizational unit or location and in any sub-folders will be audited.

So, you can audit every networked computer by selecting the Company Root Organizational Unit. This name will have been changed to your company's name when Discovery was set up.

Exercise: Requesting an Audit on Demand

To request an audit on demand, complete the following steps.

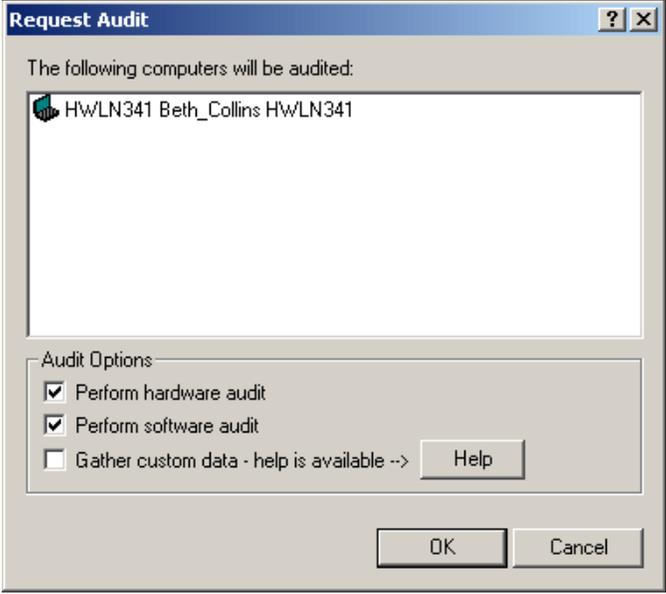


Step	Action
1	In the Control Center , click on the Mro Software folder in the left pane.
2	Click on your computer's name in the right pane.

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Requesting an Audit on Demand continued

Exercise: continued
Requesting an Audit on Demand

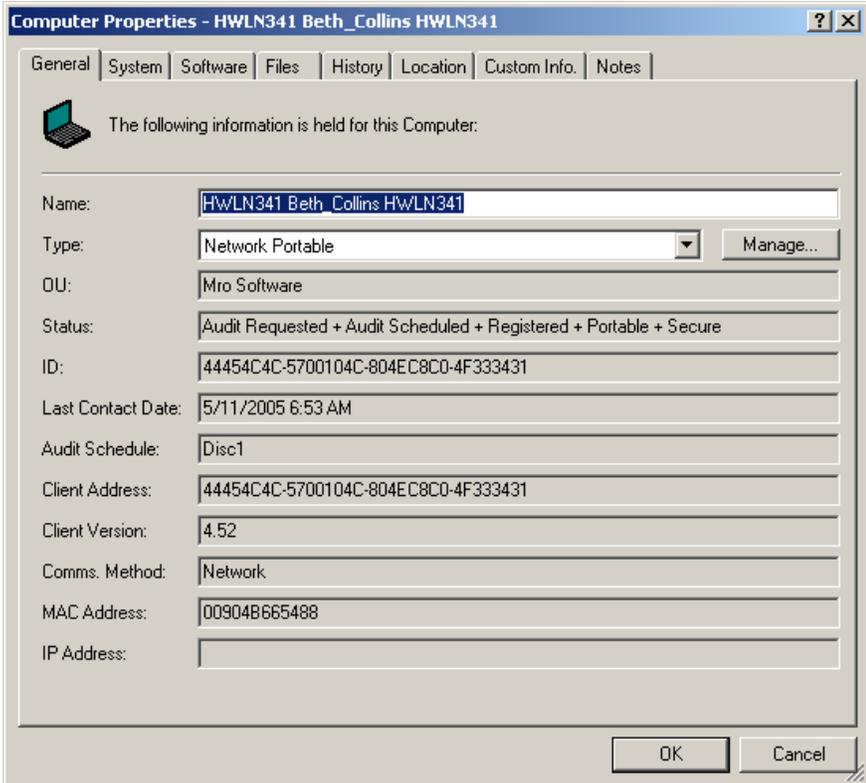
Step	Action
3	<p>From the File pull-down menu, select Client and then Request Audit.</p> <p><u>Result:</u> The Request Audit dialog box opens.</p> 
4	<p>Click OK.</p> <p><u>Result:</u> The status of the selected computer is changed to Audit Requested. All computers that have an audit requested (in this case, one) that are currently connected to the network will carry out the audit immediately.</p>

Viewing Audit Results

Exercise:
Viewing the
Results of an
Audit

After you have run an audit, you might want to view the results. Complete the following steps to view the results of the audit we just ran on your computer.



Step	Action
1	In the Control Center , click on the Mro Software folder in the left pane.
2	Click on your computer's name in the right pane.
3	<p>From the File pull-down menu, select Properties. <u>Result:</u> The Computer Properties screen opens.</p> 

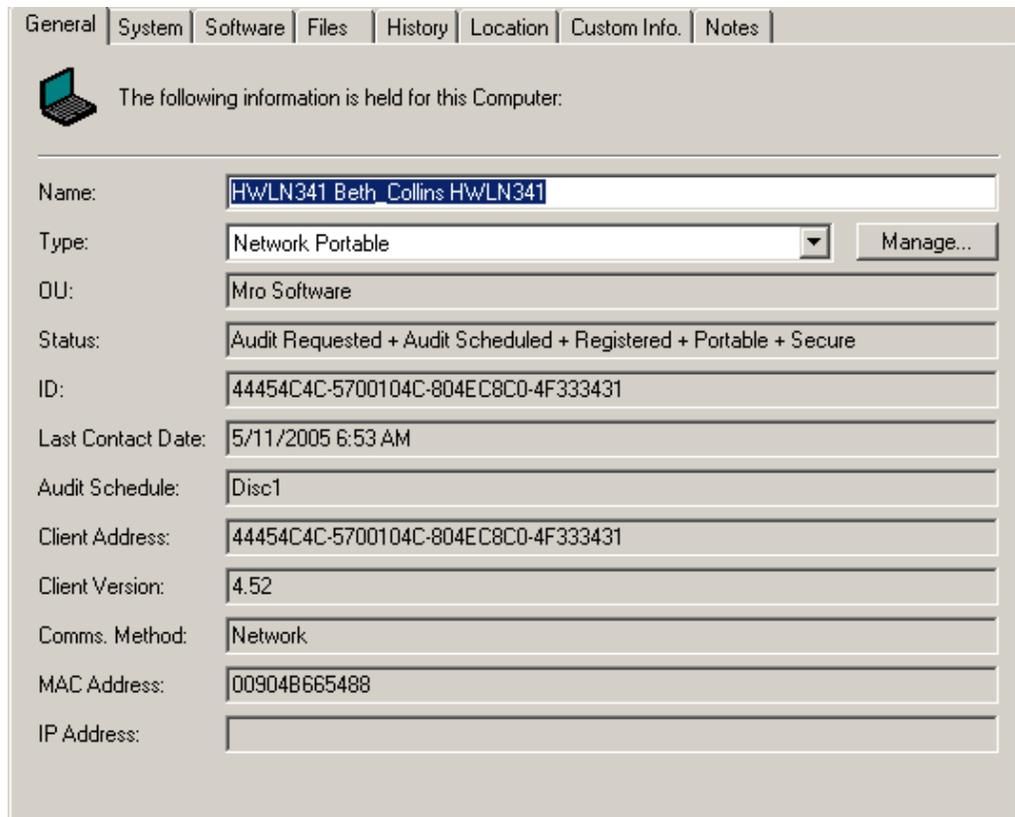
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Viewing Audit Results continued

The Computer Properties Screen

There are eight tabs on the Computer Properties screen on which you can view specific information regarding the audited computer. We will discuss each tab and the information contained in it separately.

The General Tab



The following information is held for this Computer:

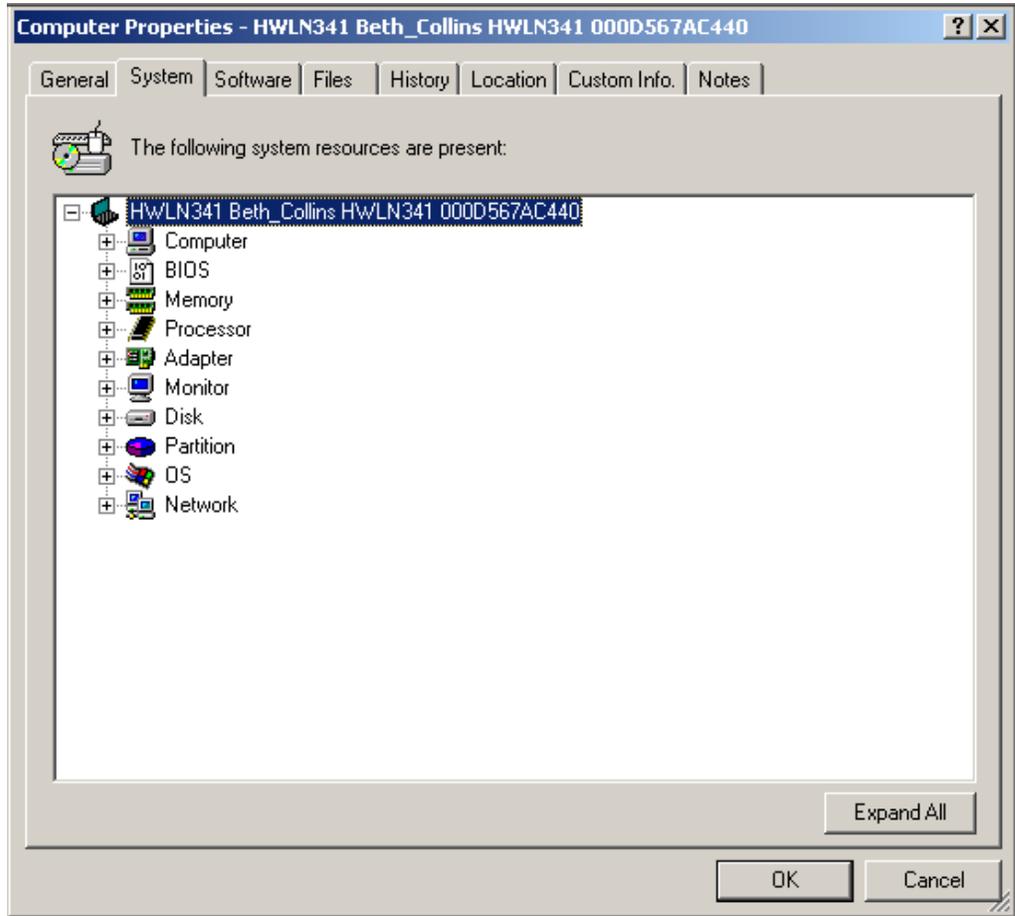
Name:	HwLN341 Beth Collins HwLN341
Type:	Network Portable <input data-bbox="1333 751 1469 787" type="button" value="Manage..."/>
OU:	Mro Software
Status:	Audit Requested + Audit Scheduled + Registered + Portable + Secure
ID:	44454C4C-5700104C-804EC8C0-4F333431
Last Contact Date:	5/11/2005 6:53 AM
Audit Schedule:	Disc1
Client Address:	44454C4C-5700104C-804EC8C0-4F333431
Client Version:	4.52
Comms. Method:	Network
MAC Address:	00904B665488
IP Address:	

This tab provides information on the name given to the computer by the user or administrator; the type of computer; the organizational unit (**OU**) in which the computer resides; the status; the unique number (**ID**) for the computer to distinguish it from the other computers audited on the network; the date the last message was received from the computer (**Last Contact Date**); the audit schedule attached to this computer (**Audit Schedule**); Discovery's internal, unique ID for the computer (**Client Address**); the method by which the Control Center communicates with the client computer (**Comms. Method**); the MAC address of the computer; and the current IP address of the computer.

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Viewing Audit Results continued

The System Tab

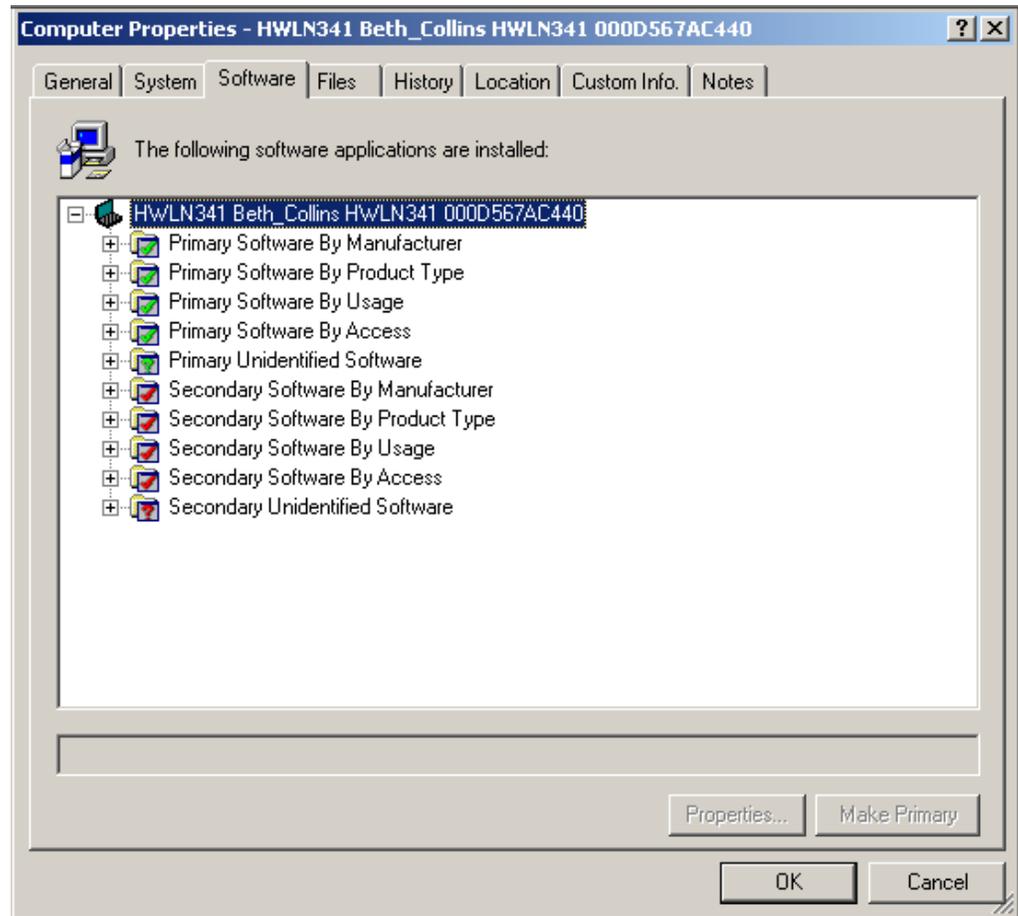


The System tab displays hardware and network details for the selected computer. You can click on each of the plus **+** icons or click the **Expand All** button to view the details next to each of the categories.

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Viewing Audit Results continued

The Software Tab



The Software tab is divided into primary and secondary software. *Primary* software is software that a computer is set up to use. *Secondary* software is all the other software discovered on that computer. Most of the folders are self-explanatory.

continued on next page

Viewing Audit Results continued

The Software Tab

continued

The following table describes the **Software By Usage** categories:

Usage Category	Description
Never	The application has not been run on this computer since the date given. This is the date on which the computer was first audited by Discovery.
Occasionally	The application is run infrequently and less than monthly. The date displayed is the last time that the Discovery Client Agent saw the application running on this computer.
Monthly	The application is run approximately once a month on this computer.
Weekly	The application is run approximately once a week on this computer.
Daily	The application is run approximately once a day on this computer.
N/A	This is seen if the file is on a standalone computer or a remote server, or is a type of file for which usage is not appropriate, such as a font file.

The **Primary Software by Access** folder lists software according to how it is accessed; that is, local, network (network shortcut), or Terminal (software run via the Terminal Server or a Citrix Metaframe client session).

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Viewing Audit Results continued

The Files Tab

Disk Space Usage by File Type is displayed below:

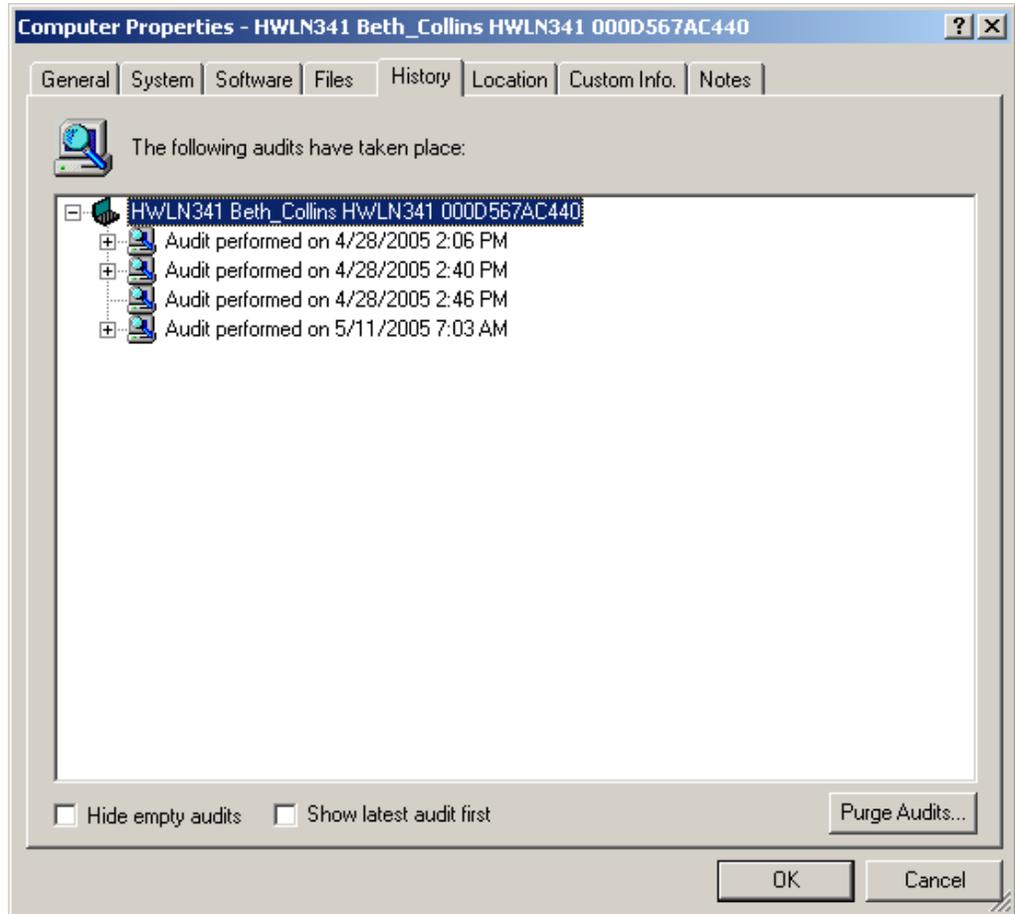
File Type	Description	Space ...	% Used Space	No. Files	% Total Files
DBF	DBF File	2.6GB	10.50%	34	0.01%
ZIP	WinZip File	2.6GB	10.43%	400	0.17%
EXE	Application	1.9GB	7.52%	2255	0.97%
JAR	Executable Jar File	1.6GB	6.68%	2436	1.05%
A5P	Macromedia Autho...	1.6GB	6.67%	244	0.11%
(other)	All other file types	1.6GB	6.53%	34138	14.75%
SYS	System file	1.5GB	6.20%	334	0.14%
DLL	Application Extensi...	1.4GB	5.48%	6703	2.90%
DOC	Microsoft Word Do...	1.1GB	4.60%	1466	0.63%
LOG	Text Document	1.1GB	4.38%	797	0.34%
WAV	wav file	709.1MB	2.81%	1867	0.81%
A5R	Macromedia Autho...	593.4MB	2.35%	152	0.07%
AAS	Macromedia Autho...	590.7MB	2.34%	28211	12.19%
PDF	Adobe Acrobat Do...	471.4MB	1.87%	387	0.17%
CAB	WinZip File	414.9MB	1.64%	371	0.16%
DAT	DAT File	384.6MB	1.52%	1052	0.45%
TMP	TMP File	359.3MB	1.42%	1075	0.46%
DFJ	DFJ File	299.4MB	1.18%	2	0.01%
ORA	ORA File	293.2MB	1.16%	203	0.09%
EAR	EAR File	291.4MB	1.15%	39	0.02%
CLASS	CLASS File	207.9MB	0.82%	18566	8.02%
HTM	HTML Document	200.7MB	0.79%	40563	17.52%
NSF	NSF File	199.1MB	0.79%	13	0.01%

The Files tab displays a summary of disk space usage by file type extension. This is the total usage across all hard disks. By default, the list is in order of decreasing space used, but you can reorder the page by clicking on the column titles. In addition, by default, the top 50 file types (in terms of disk space usage) are shown. All other file types are grouped under **All Other File Types**.

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Viewing Audit Results continued

The History Tab



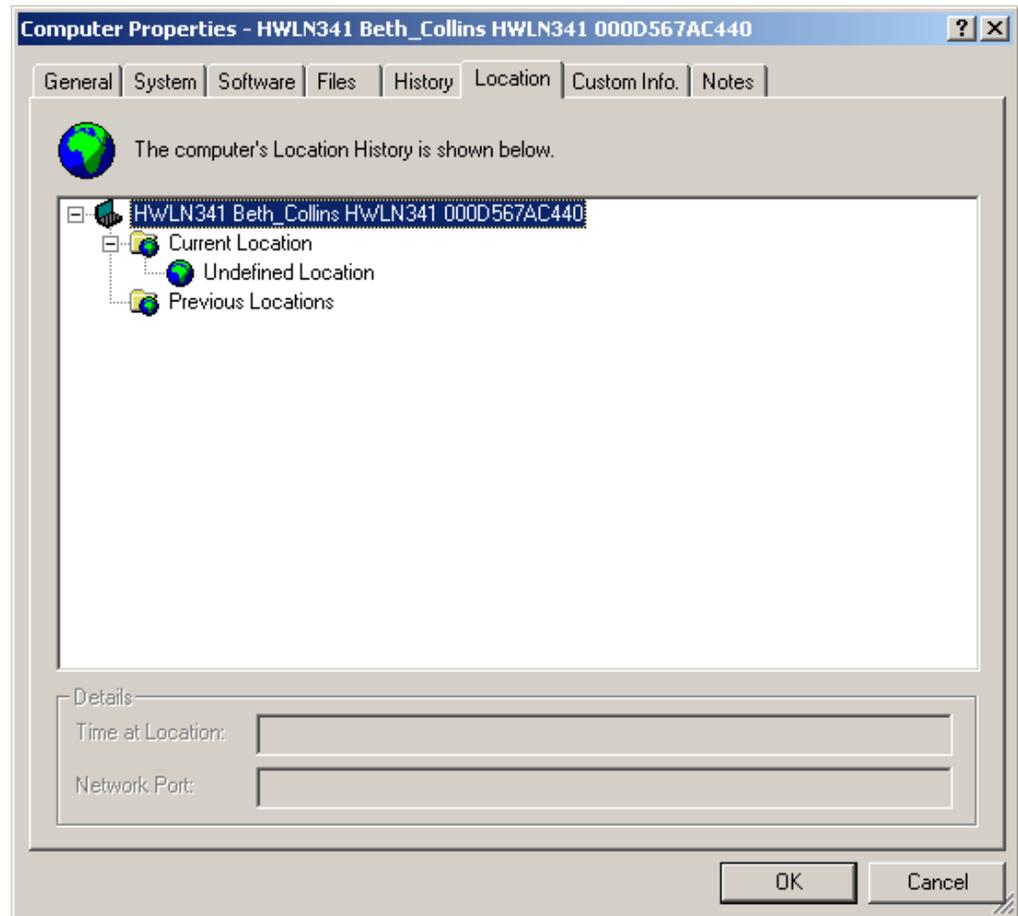
The History tab lists the audits performed on a particular computer. For each audit, you can display details of the hardware and software added and removed. You can also delete the audit history of a computer.

The first time that a computer is audited, all of the hardware and software discovered on the computer is included in the **Added** folder. (The Added folder is visible when you click on the plus  icons next to the audits.)

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Viewing Audit Results continued

The Location Tab

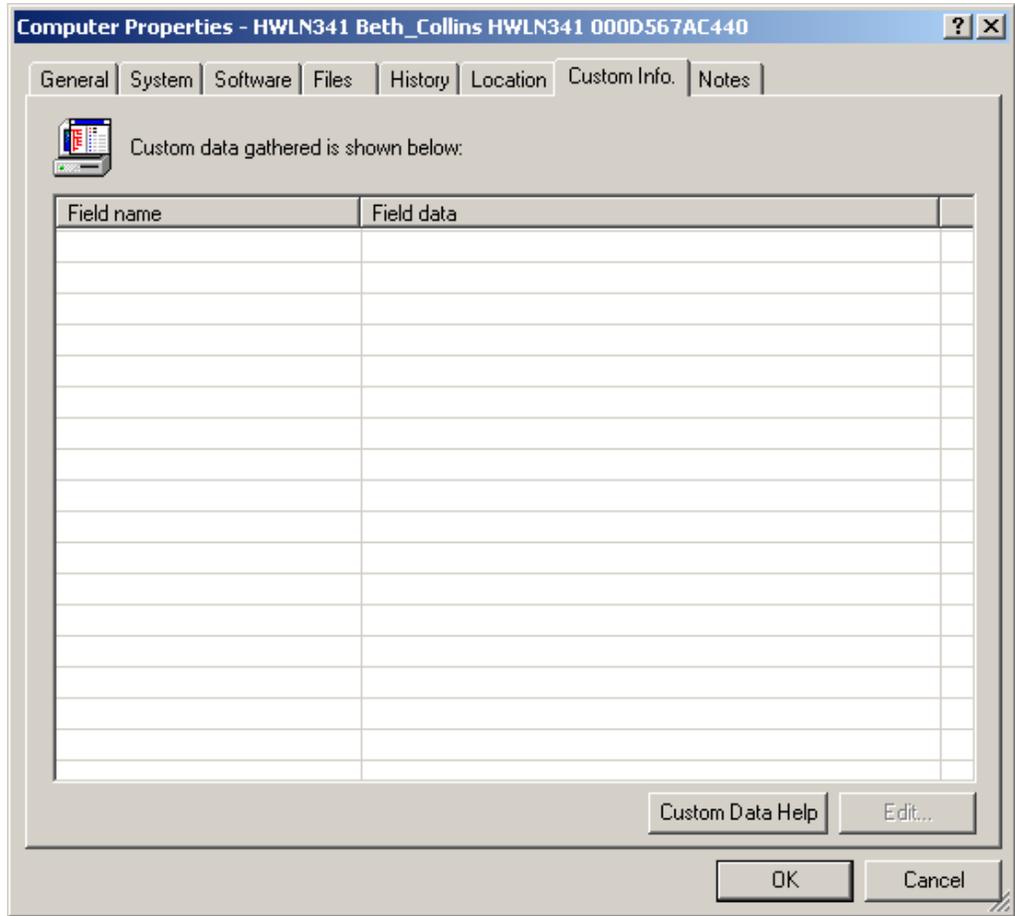


The Location tab lists the current and previous locations for the selected computer.

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Viewing Audit Results continued

The Custom Info Tab

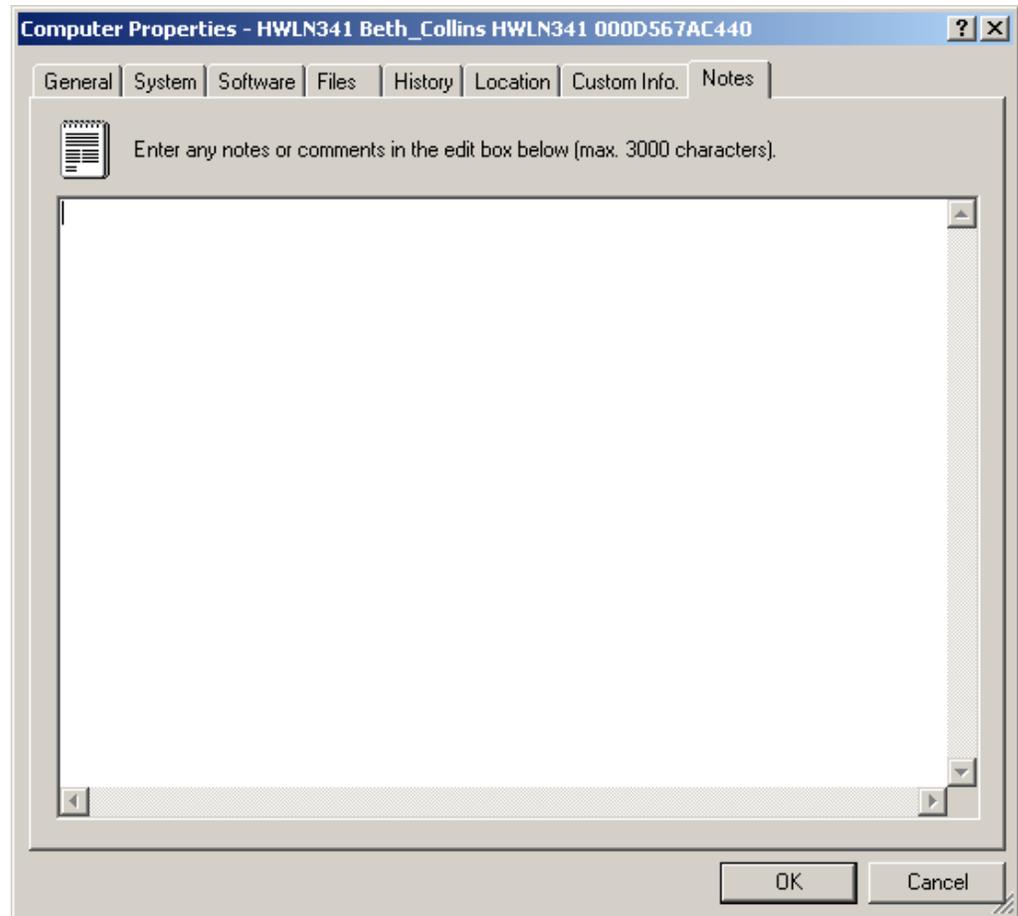


The Custom Information tab displays the information entered by users when the Client Agent is first installed on their computer or at subsequent audits. You can customize the user input dialog and the information that users are prompted to enter.

continued on next page

Viewing Audit Results continued

The Notes Tab



The Notes tab is a free-form page in which you can enter text relating to a computer. For example, you might want to use it as a reminder of things you need to do or have done on a computer, such as “Changed hard disk on 15/1/2005.” Notes are limited to 3000 characters.

Fusion

Introduction

With Maximo Fusion, enterprises can aggregate data collected by disparate asset discovery tools and integrate it into Maximo, creating a central repository for enterprise IT asset management, reporting, and decision support.

After you have discovered your data through Maximo Discovery (or another discovery tool), the data will be migrated into the Maximo database via the Fusion application. Maximo Fusion connects to data sources using JDBC technology-enabled drivers, which support a wide range of databases and other data sources, such as spreadsheets and flat files.

Your system administrator will perform the initial setup of Fusion; however, each time an audit is scheduled, you will need to refresh the data viewable in Maximo through Fusion. In the following exercise, we will use Fusion to migrate the data we collected in the previous exercise into the Maximo database. Please note that the information you enter in this exercise will be different from what you will enter at your worksite. Contact your system administrator for more information.

Exercise: Mapping Discovery Data to Maximo Audit



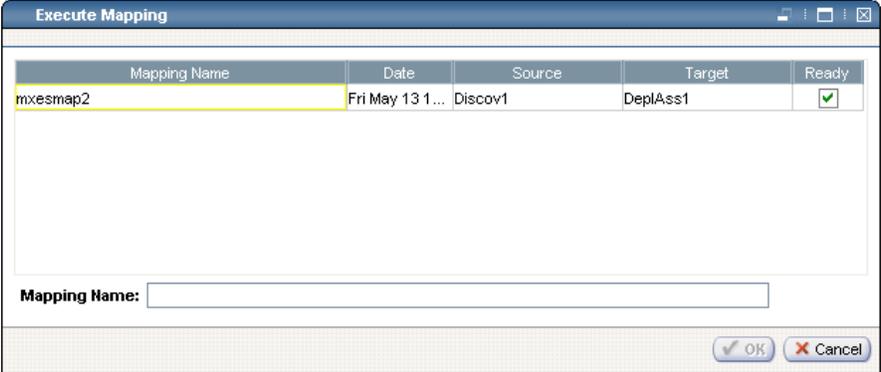
To migrate your data from Discovery to the Maximo database, complete the following steps.

Step	Action
1	<p>Go to the Maximo Fusion application. <u>Result:</u> Maximo displays the Fusion sign-in page.</p> 

continued on next page

Fusion continued

Exercise: continued
Mapping
Discovery Data
to Maximo Audit

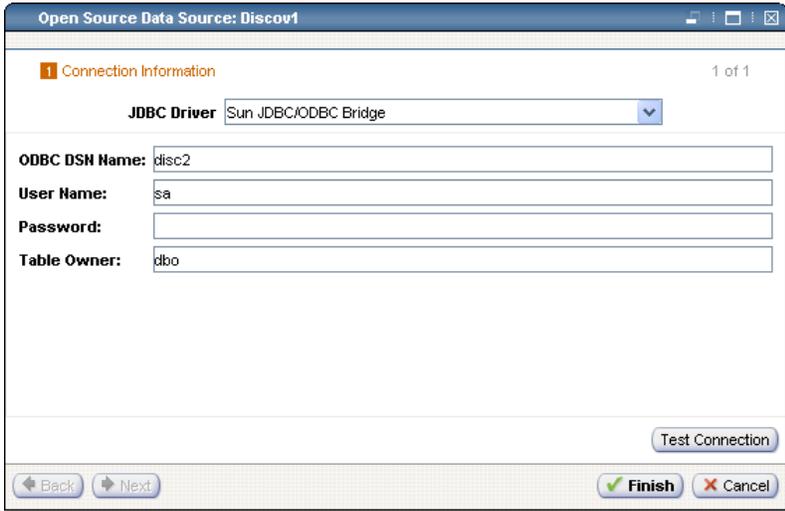
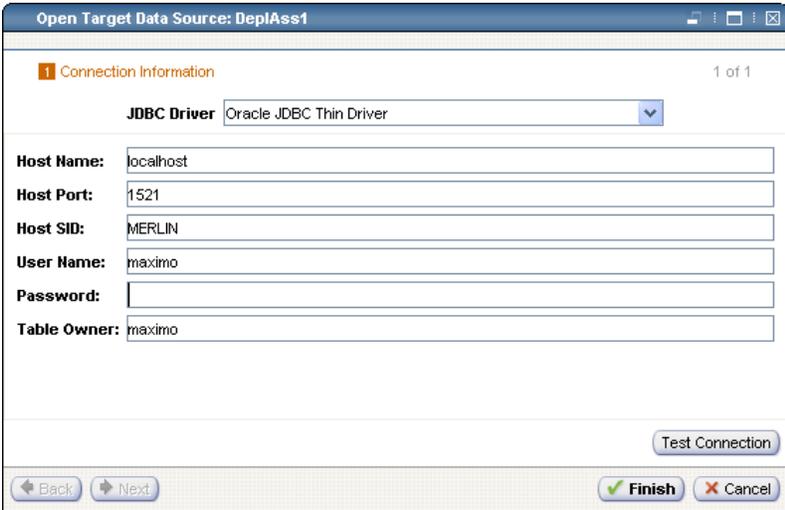
Step	Action										
2	<p>Enter maximo in the password field, then click Sign In. <u>Result:</u> The Maximo Fusion interface opens.</p>  <p>The screenshot shows the Maximo Fusion interface with two main panels: 'Data Source' and 'Mapping'. The 'Data Source' panel includes options like 'Define New Data Source', 'Browse Data Source by Structure', 'Browse Data Source by Data', 'Delete Data Source', and 'Close Data Source Connection'. The 'Mapping' panel includes options like 'Create New Mapping', 'Open Existing Mapping', 'Delete Mapping', 'Delete Mapping Last Scan History', and 'Execute Mapping'.</p>										
3	<p>On the Mapping side of the screen, click on Execute Mapping. <u>Result:</u> The Execute Mapping dialog box opens.</p>  <p>The screenshot shows the 'Execute Mapping' dialog box. It contains a table with the following data:</p> <table border="1"> <thead> <tr> <th>Mapping Name</th> <th>Date</th> <th>Source</th> <th>Target</th> <th>Ready</th> </tr> </thead> <tbody> <tr> <td>mxesmap2</td> <td>Fri May 13 1...</td> <td>Discov1</td> <td>DeplAss1</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p>Below the table is a 'Mapping Name:' text box and 'OK' and 'Cancel' buttons.</p>	Mapping Name	Date	Source	Target	Ready	mxesmap2	Fri May 13 1...	Discov1	DeplAss1	<input checked="" type="checkbox"/>
Mapping Name	Date	Source	Target	Ready							
mxesmap2	Fri May 13 1...	Discov1	DeplAss1	<input checked="" type="checkbox"/>							
4	<p>Highlight the Mapping Name.</p>										

continued on next page

Fusion continued

Exercise:
Mapping
Discovery Data
to Maximo Audit

continued

Step	Action
5	<p>Click OK.</p> <p><u>Result:</u> Maximo displays the connection information dialog box for Discovery (the source). There is no password for this screen.</p> 
6	<p>Click Finish.</p> <p><u>Result:</u> The connection information dialog box for the Maximo database (the target) is displayed.</p> 

continued on next page

Fusion continued

Exercise: Mapping Discovery Data to Maximo Audit

continued

Step	Action
7	Enter maximo in the Password field.
8	<p>Click Finish.</p> <p><u>Result</u>: Fusion begins to compile the files.</p> 
9	<p>When mapping is complete, you will see the following message:</p>  <p>Click OK.</p> <p><u>Result</u>: The Maximo Discovery data has been mapped to the Maximo database.</p>

Automating Mapping

After creating and saving a mapping, you can optimize productivity by executing a mapping from a command line. This is especially useful if a mapping is executed often. In addition, you can place the command in a batch file and execute schedules through Norton or Windows scheduler on a regular basis. For more information, refer to the *Maximo Fusion System Administrator's Guide*.

Deployed Assets

Overview

After your deployed asset data is migrated into Maximo, you can view it in the Deployed Assets module through the Computers, Network Devices, and Network Printers applications. Maximo also uses data imported by Maximo Fusion to generate various reports.

In this next section we will view the data we found in our Discovery audit.

The Deployed Assets Module

Maximo maintains two distinct sets of IT asset data in two different Maximo modules: the Assets module and the Deployed Assets module.

Maximo maintains asset records for purchased or leased IT assets in the Assets application. You create these records in the Assets application or when you use the Receive Rotating Items action in the Receiving application. An IT asset is an asset that has a class structure identifier that belongs to the top-level IT classification used in your enterprise.

In addition to asset information in the Assets applications, the Maximo Deployed Assets module applications maintain data collected directly from assets actually installed in your enterprise. To gather this data, asset discovery tools (Maximo Discovery, or another tool such as SMS or Tivoli Inventory) scan computers, network devices, and network printers deployed in your enterprise and record information about the hardware and software installed on those assets. Maximo Fusion, an integration tool for aggregating deployed asset data, imports the collected data into Maximo. You view this data in the Deployed Assets module applications. Deployed Assets provides an aggregate view of the last scanned state of the authorized assets discovered on the network, and is used to support reconciling the state of the authorized asset across multiple sites.

The Deployed Assets module contains three applications: Computers, Network Devices, and Network Printers. The **Computers** application displays data about specific computers deployed at your company. The **Network Devices** application displays information about deployed network devices such as routers, switches, and hubs. The **Network Printers** application displays information about deployed network printers.

The Computers Application

Introduction

The Computers application displays data about computers deployed in your enterprise. It includes tabs with specific information about the computer itself, as well as the computer's software, storage devices, processors, media adapters (such as sound and video cards), communication devices (such as modems and network adapters), network settings for TCP/IP and IPX, image devices (such as printers and scanners), displays, and users. You can use this application to view information about deployed computers, but you cannot use it to create computer records. Computer records displayed in the Computers application are read-only; you cannot edit them. You can use this application to delete computer records from the database, but you cannot delete a component, such as a processor, from a computer record.

Data displayed in this application varies depending on the asset discovery tool used to collect the data. Some data fields in the Computers application might be empty. An empty field indicates that the asset discovery tool did not collect the data or that administrators did not map the data for import into Maximo. Data displayed in some fields in the Computers application is affected by parameters your administrator defines in the Maximo administrative applications. Administrative applications affect how Maximo displays manufacturer, media adapter, operating system, processor, and software names, as well as software suites and usage frequency data for software applications and software suites.

Viewing Discovered Computer Data in Maximo

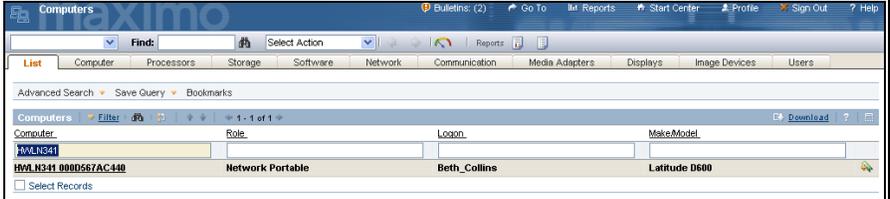
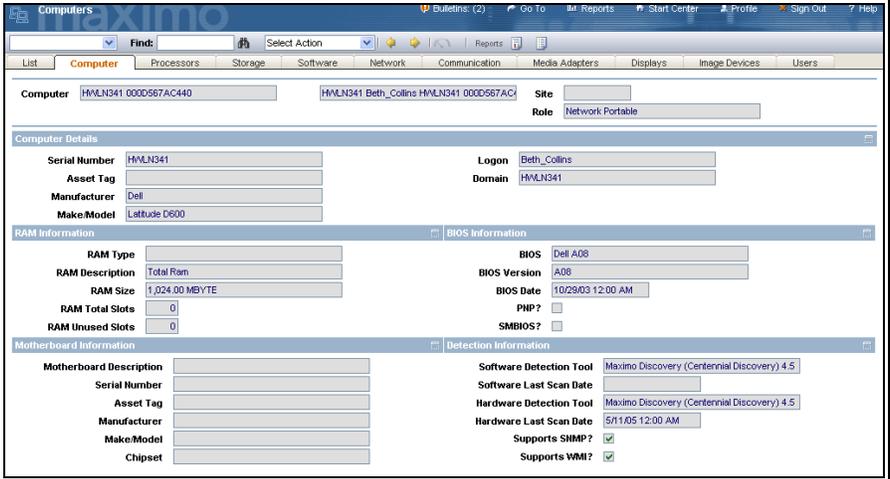
Introduction

In the following exercise, we will view the data we discovered when we created our on-demand audit previously in this chapter. We will be using the Computers application in the Deployed Assets module.

Exercise: Viewing Discovered Computer Data in Maximo



To view discovered computer data in Maximo, complete the following steps.

Step	Action
1	Go to the Computers application in the Deployed Assets module. (The Deployed Assets module is in the Assets module.)
2	Because we conducted an audit on your computer, enter <i>your computer name</i> in the Computer field on the Find tab.
3	Click the Filter Table  icon. <u>Results:</u> Your computer should appear in the results list.
	
4	Click on your computer name. <u>Result:</u> Maximo displays the Computer tab with your data.
	

The Computers Application Tabs

Computers Application Tabs

There are eleven tabs in the Computers application. The following table describes the types of information each tab contains.

Tab	Description
All Tabs	Display computer information such as computer name, description, site (location), role or function (the role is assigned to the computer by the asset discovery tool), serial number, asset tag, manufacturer, make/model, sign-in name for the last known user signed in to the computer, and domain name of the computer's network. <u>Note:</u> Data displayed on the tabs varies, depending on the asset discovery tool used to collect the data. Some data fields might be empty. An empty field indicates that the asset discovery tool did not collect the data or that administrators did not map the data for import into Maximo.

continued on next page

The Computers Application Tabs continued

Computers Application Tabs continued

Tab	Description
Computer	<ul style="list-style-type: none"> • RAM information, such as type, description, size, and unit of measurement, total number of RAM slots, number of unused RAM slots. • BIOS information, such as BIOS name, version, release date on which it was installed on the motherboard, whether or not it supports plug-and-play (PNP) devices, and whether or not the BIOS on the motherboard supports the SMBIOS specification standards. • Motherboard information, such as motherboard description, serial number, asset tag, manufacture, make/model, and chipset. • The Detection Information area displays data about how the computer data was collected, such as the software detection tool, software last scan date, hardware detection tool, hardware last scan date, whether the computer supports SNMP (Simple Network Management Protocol) and has enabled it, and whether the computer supports WMI (Windows Management Instrumentation) and has enabled it.
Processors	Information about processor(s) installed on the selected computer, such as manufacturer, make/model, maximum speed (clock speed specified by the processor's manufacturer), unit of measurement for the speed, processor description, serial number, and current speed (clock speed of the processor as set on the motherboard).

continued on next page

The Computers Application Tabs continued

Computers Application Tabs continued

Tab	Description
Storage	Information about physical storage components, such as hard disks, floppy drives, tape devices, and external removable storage, as well as data about logical drives. The Storage tab displays the following subtabs: <ul style="list-style-type: none">• Disks: View disk (physical storage device) records.• Logical Drives: View logical drive records. These can be local partitions or mapped network drives.
Software	Information about software applications, operating systems, software application suites, and files installed. The Software tab displays the following subtabs: <ul style="list-style-type: none">• Applications: View information about software applications on the selected computer.• Operating Systems: View information about the operating systems on the selected computer.• Suites: View information about software application suites on the selected computer.• Files: View information about files on the selected computer.

continued on next page

The Computers Application Tabs continued

Computers Application Tabs continued

Tab	Description
Network	Information about network adapter settings (TCP/IP and IPX settings). The Network tab displays the following subtabs: <ul style="list-style-type: none"> • TCP/IP: View information about TCP/IP settings. • IPX: View information about IPX settings.
Communication	Information about communication devices (modems) installed. The Communication tab displays the following subtabs: <ul style="list-style-type: none"> • Network Adapters: View information about network adapters on the selected computer. • Communication Devices: View information about communication devices (such as modems) on the selected computer.
Media Adapters	Information about media adapters, such as sound and video cards, media adapter type, media adapter description, serial number, asset tag, manufacturer, make/model, RAM size, memory type, bus type, and chipset.
Displays	Information about the monitor installed, such as display type, description, serial number, asset tag, manufacturer, make/model, display size, color depth bit (that is, the maximum color depth that the display can process), maximum horizontal resolution in dots per inch, and maximum vertical resolution in dots per inch.

continued on next page

The Computers Application Tabs continued

Computers Application Tabs continued

Tab	Description
Image Devices	Information about image devices associated with the selected computer, such as device name, description, serial number, asset tag, device type, manufacturer, make/model, system alias of the imaging device (such as LPT1), current RAM size, maximum RAM size, whether the device can be used as a printer, whether the device is capable of sending faxes, whether the device is capable of scanning, whether the device can be used as a copier, maximum paper width the device can accommodate, maximum paper length the device can accommodate, connection interface between the imaging device and the computer (such as USB or parallel ports), number of paper trays on the device, color depth bit (that is, the maximum color depth that the device can process), vertical DPI (that is, the maximum vertical resolution in dots per inch), and horizontal DPI (that is, the maximum horizontal resolution in dots per inch).
Users	Information about the users associated with the selected computer, such as personnel number, last name, first name, work phone, work e-mail, job title, department, GL account to which the user is assigned, computer asset tag, facility at which the user works, building where the user works, and floor of the building where the user works.

Reconciliation

Introduction

The applications in the Reconciliation module let you configure the process Maximo uses to compare and reconcile the IT asset information in the Assets application with the deployed asset data maintained in the Deployed Assets applications. The reconciliation process identifies successful matches between IT assets and deployed assets, as well as discrepancies and variances between the two sets of records.

You can use this comparison to determine whether the IT assets deployed at your company match the record of authorized assets maintained in the Assets application. Authorized users can view reconciliation results in the Reconciliation module applications or in reports. You can also view reconciliation results in the Assets application using the Asset Details action available from the Select Action menu. Discrepancies might be caused by a variety of factors, including incorrect data entry, reconfigured hardware or software, retired hardware or software, theft, and unauthorized use of hardware and software.

The Reconciliation Module

The Reconciliation module, located in the Administration module, consists of six applications. Although it is beyond the scope of this course to examine these in depth, the following table briefly describes these applications.

Application	Description
Reconciliation Tasks	Combines one or more link rules and, if necessary, a task filter and one or more comparison rules into a reconciliation task. This application also lets you specify how Maximo reports results for comparison rule evaluations: all results, failed reconciliations, or successful reconciliations.
Task Filters	Defines a subset of either assets or deployed assets to reconcile. If you do not define a task filter for a reconciliation task, Maximo compares all top-level IT assets with all deployed assets when it processes the reconciliation task.

continued on next page

Reconciliation continued

The
**Reconciliation
Module**

continued

Application	Description
Link Rules	Establishes a relation between a top-level IT asset and a computer, network printer, or network device in deployed assets. The link rule establishes the basis of the comparison by identifying the object and attribute in IT assets to link to a specific attribute in deployed assets.
Comparison Rules	Identifies objects or attributes of a child or parent IT asset to compare with objects or attributes of a child or parent deployed asset when Maximo executes a reconciliation task.
Link Results	Lists successful one-to-one links Maximo establishes between a top-level IT asset and a computer, network printer, or network device in deployed assets.
Reconciliation Results	Lists link failures that occur when Maximo does not find a successful one-to-one link between an IT asset and a deployed asset specified in a link rule. (Failures occur when the reconciliation process finds no link or finds multiple links.) The application also lists results of comparison rule evaluations.

For more information about the Reconciliation module, refer to the *Maximo Reconciliation Module Implementation Guide*.

Asset Details

View Asset Reconciliations

After the reconciliation process has been initiated, you can run reports to view and manage your result set. For individual assets, you can use the **Asset Detail** action in the Assets application to see what the reconciliation differences were for the asset.

“Authorized” data is pulled from the Asset Specifications Attribute information indicated in the Asset application. Then it is compared (reconciled) to “Discovered” deployed attribute information indicated in the Deployed Assets module.

The screenshot shows the 'Asset Details' window with the following fields:

- Asset: 20000
- Site: MCLEAN
- Linked Node ID: 1
- IT (UNSPSC),Computer_Equipment,Computer,D

Asset Specification (1 - 3 of 3)

Attribute	Description	Alt Value	Numeric Value	Unit of Measure
DISKSIZE	DISK SIZE		4.00	GBYTE
PROSPEED	PROCESSOR SPEED		266.00	PROSPEED
RAMSIZE	MEMORY SIZE		96.00	MBYTE

Reconciliation Differences (1 - 4 of 4)

Asset Attribute	Asset Value	Unit	DPA Attribute	DPA Value	Unit	Reconciliation Message	Reconciliation Date
RAMSIZE	96.00	MBYTE	RAMSIZE	64	MB	Attribute equality comparison has failed.	2/6/05 1:59 PM
RAMSIZE	96.00	MBYTE	RAMSIZE	64	MB	Attribute equality comparison has failed.	2/6/05 2:04 PM
						No deployed assets were retrieved by the c...	2/11/05 1:16 PM
						Matches found comparison has failed.	2/11/05 6:18 PM

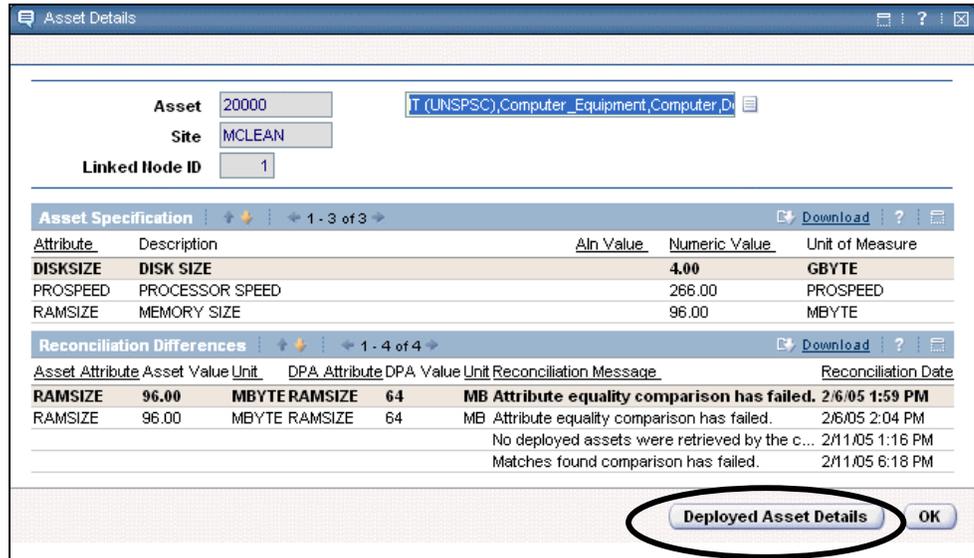
Buttons: Deployed Asset Details, OK

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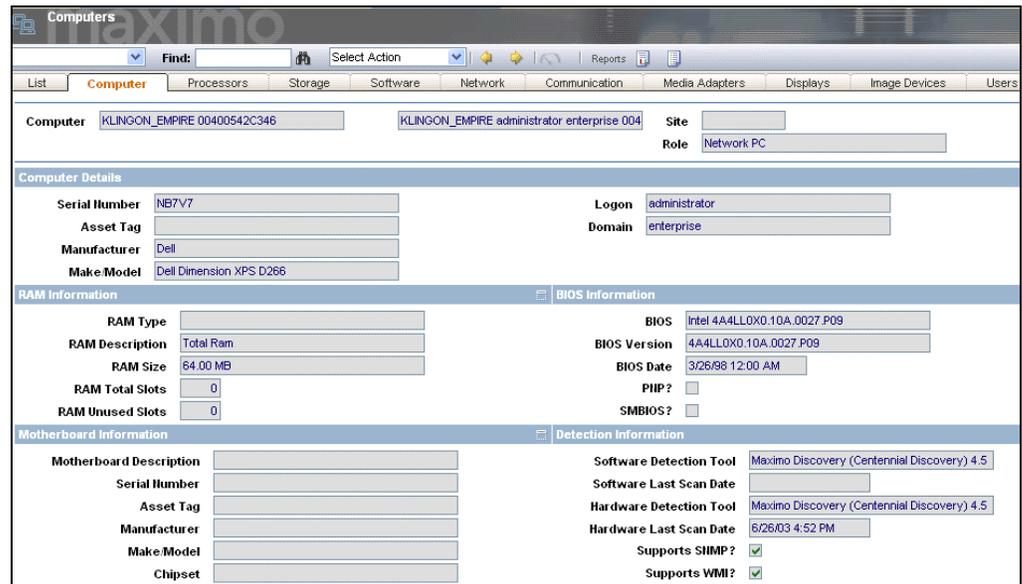
Asset Details continued

Asset Details and Deployed Asset Viewing

In the **Asset Details** window, you can view the deployed (discovered) data for the asset by clicking **Deployed Asset Details**.



This brings you to one of the **Deployed Assets** applications in the **Assets** module.



Chapter Summary

Managing Deployed Assets

Maximo provides you with a process by which you can track all the assets on your network, audit their configuration, and compare and reconcile what you expect to be there with what is actually there.

This process includes:

- Setup and execution of a network discovery tool (for example, Maximo Discovery)
 - Interpretation of the discovered data
 - Mapping of the data via Fusion and the appropriate cartridge
 - Migration of this data into the Maximo Deployed Assets module via Fusion
 - Establishment of a link between discovered node and authorized parent asset
 - Comparison of the Deployed Asset data versus the Authorized Asset data
-

Discovery

Maximo Discovery processes are controlled through the Control Center. You can create audit schedules so that Discovery will run audits at specific times, or you can run audits on demand.

Fusion

After you have discovered your data through Maximo Discovery (or another discovery tool), you will use the Fusion application to migrate it into the Maximo database. If you execute mapping often, after you have created and saved a mapping, you can optimize productivity by executing a mapping from a command line.

Deployed Assets

After discovered data is migrated into Maximo, you view this data in the Deployed Assets module applications. The Deployed Assets module contains three applications: Computer, Network Devices, and Network Printers.

Reconciliation

The applications in the Reconciliation module let you configure the process Maximo uses to compare and reconcile the IT asset information in the Assets application with the deployed asset data maintained in the Deployed Assets applications. The reconciliation process identifies successful matches between IT assets and deployed assets, as well as discrepancies and variances between the two sets of records.

Workshop

Exercise



Create a new Maximo Discovery schedule. Have your audit run every Tuesday at 12:00 PM.

Review Questions

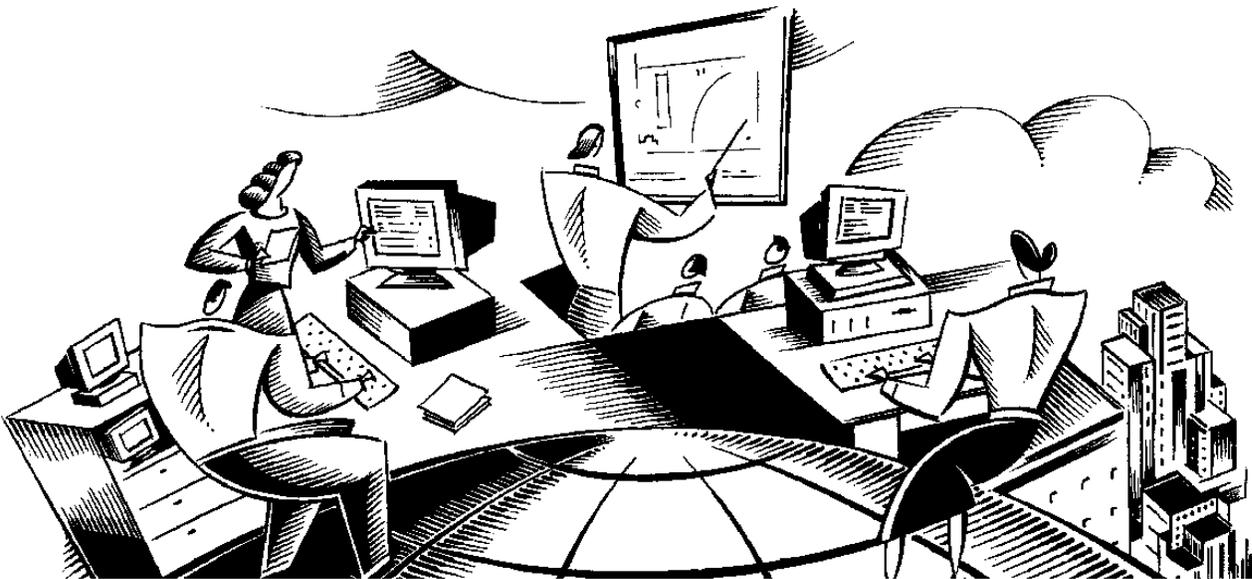
Review Questions



1. Where can you view the results of an audit before migrating the data into Maximo?
 2. Where can you view the results of an audit after the data is migrated into Maximo?
-

IT Asset Configuration and Management in MXES

Unit 6: Disposal



In This Unit

This unit contains the following chapters:

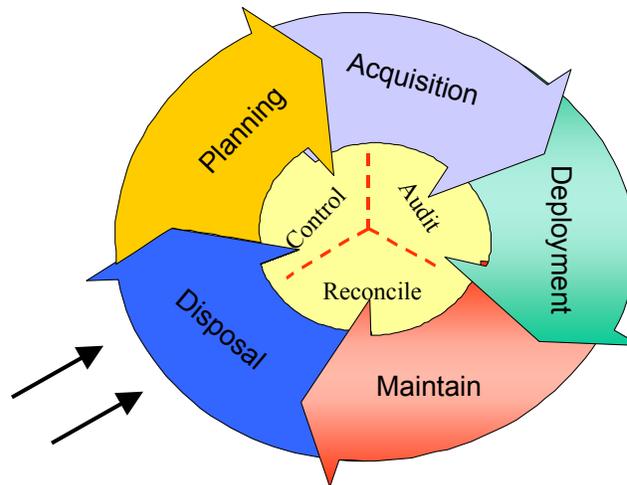
Chapter	Subject
10	Returns and Decommissions

Unit Purpose

The purpose of this unit is to demonstrate how Maximo supports the disposal of IT assets.

Disposal and the IT Lifecycle

Disposal and the IT Lifecycle



We have gone through the planning, acquisition, deployment, and maintain phases, and we are now ready for the fifth phase: disposing of (decommissioning) our assets.

Disposing of Assets

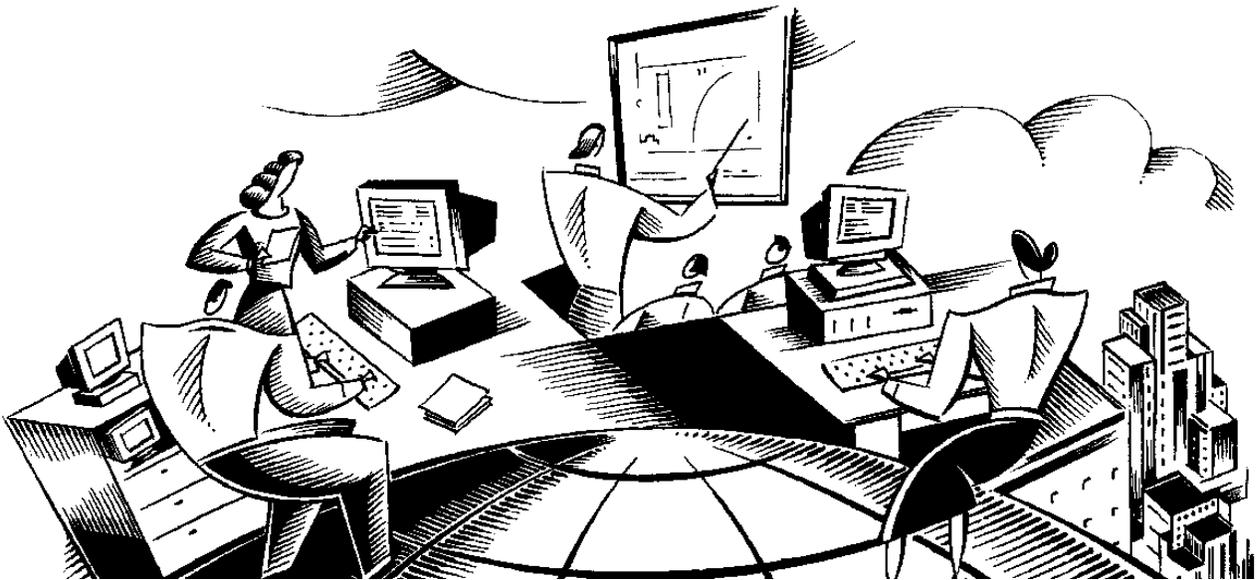
When assets are outdated, are broken beyond repair, or have expired leases, you will need to decommission them. This unit will focus on how Maximo supports the retirement or disposal of IT assets.

Unit Scenario

Scenario In this unit we will return a laptop to the vendor and decommission it.

IT Asset Configuration and Management in MXES

Chapter 10: Returns and Decommissions



In This Chapter

This chapter contains the following topics:

Topic	See Page
Chapter Overview	10-1
Returning Leased Items to a Vendor	10-2
Disassociating a User or Custodian from an Asset	10-4
Chapter Summary	10-5
Workshop	10-6
Review Questions	10-7

Chapter Overview

Introduction

Decommissioning IT assets refers to deinstalling, decommissioning, and disposing of an IT asset. This can occur due to the end of a lease or license, or when an IT asset is being replaced or retired because it is technologically obsolete.

Chapter Focus

In this chapter, we will focus on the decommissioning of your IT assets.

Learning Objectives

When you have completed this chapter, you should be able to:

- return a leased item to a vendor and decommission it, and
 - disassociate a user or custodian from an asset.
-

Returning Leased Items to a Vendor

Introduction

When leased hardware reaches the end of the lease term, there are two ways you can handle it in Maximo. One way is to locate the hardware in the Assets application and move it to a salvage location. Another way is to create a vendor return storeroom and move the asset to that storeroom. In the following exercises, we will move the asset out of the operating location into a salvage location and decommission it. Then, we will disassociate the user/custodian from the asset.

Exercise: Move and Decommission the Asset



To move the asset, complete the following steps.

Step	Action
1	In the Assets application, search for and select asset 7220 . <u>Note:</u> If you are in a single-database environment, your instructor will assign you an asset number.
2	Select Move/Modify Assets from the Select Action menu. <u>Result:</u> The Move/Modify Assets dialog box opens. <div data-bbox="526 1171 1377 1642" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> </div>

continued on next page

Returning Leased Items to a Vendor continued

Exercise:
Move and
Decommission
the Asset

continued

Step	Action
<p>3</p> 	<p>Enter Hardware (or the vendor return storeroom) in the To Location field in the Assets section of the screen.</p> <p><u>Note:</u> If you were not returning the asset to the vendor, but retiring it, you could also send it to a salvage location and decommission it.</p>
<p>4</p>	<p>Expand the view by clicking the View Details button.</p>
<p>5</p> 	<p>Enter DECOMMISSIONED in the New Status field.</p> <p><u>Note:</u> Assets have three statuses: Not Ready, Operating, and Decommissioned.</p>
<p>6</p>	<p>Click OK.</p> <p><u>Result:</u> The asset is moved to the new location.</p>
<p>7</p>	<p>Save the record.</p>

Disassociating a User or Custodian from an Asset

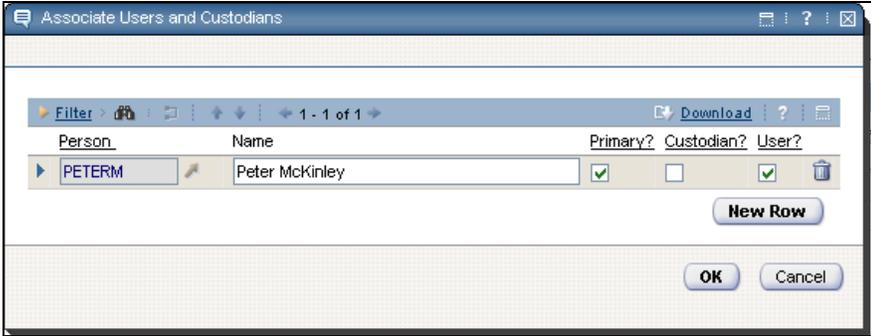
Introduction

After you have decommissioned an asset, you might want to disassociate the user or custodian from it because most likely they are no longer responsible for it. In the following exercise, we will disassociate the user/custodian from the asset we decommissioned in the previous exercise.

Exercise: Disassociating a User or Custodian from an Asset

To disassociate a user or custodian from an asset, complete the following steps.



Step	Action
1	In the Assets application, search for and select Asset 7220 .
2	Select Associate Users and Custodians from the Select Action menu. <u>Result:</u> The Associate Users and Custodians dialog box opens. 
3	Click on the Mark Row for Delete icon.
4	Click OK . <u>Result:</u> The user is no longer associated with this asset.

Chapter Summary

Returning Leased Items to a Vendor

When leased hardware reaches the end of the lease term, there are several ways you can handle it in Maximo. You can:

- locate the hardware in the Assets application, then move it to a salvage location; or
 - create a vendor return storeroom, and move the asset to that storeroom.
-

Retiring an Asset

If you are not returning the asset to the vendor, but are retiring it, you can also move it to a salvage location and decommission it.

Workshop

Exercise



Move and decommission one of the sales laptops you received earlier in this course. Then, disassociate the user/custodian for it.

Review Questions

Review Question



If a purchased asset has been taken out of service permanently, what would you do with it in Maximo?

IT Asset Configuration and Management in MXES

Appendix A: IT Service Management Processes with MXES



In This Appendix This appendix contains the following topics:

Topic	See Page
Overview	A-1
IT Service Management (ITSM) Overview	A-2
ITIL Overview	A-7
ITSM Terminology	A-11
MXES and ITSM	A-15
MXES and Service Support	A-20
MXES and Service Delivery	A-24

Overview

Introduction

IT Service Management (ITSM) processes vary from business to business. The Enterprise IT functionality of the Maximo Enterprise Suite (MXES) is both flexible and robust enough to be configured to support your organization's particular ITSM processes.

MRO Software used the Information Technology Infrastructure Library (ITIL[®]) as the framework in the development of MXE/IT.

ITIL is a collection of volumes that outline a framework of best practices for ITSM processes. You can use Maximo to take full advantage of ITIL best practices.

Focus

This appendix:

- introduces the fundamental IT Service Management concepts and terminology,
 - reviews the ten ITSM processes and the Service Desk function in the ITIL framework, and
 - identifies the Maximo applications/functions that support ITSM processes.
-

IT Service Management (ITSM) Overview

Introduction

IT Service Management (ITSM) is a systematic approach to the planning, development, implementation, delivery, and support of IT Services.

ITSM is a top-down, business-driven approach to the management of IT that addresses:

- the strategic business value generated by the IT organization, and
- delivery of the highest-quality IT service as defined by business needs.

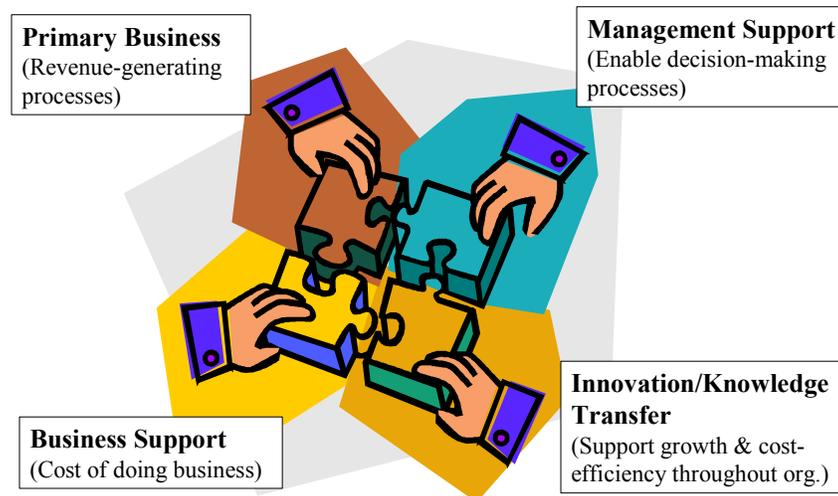
IT Service Management is designed to focus on the people, processes, and technology issues that IT organizations face, including:

- Focusing on customer's perception and experience of the service
 - Managing both customer and vendor relationships
 - Managing IT processes
-

Aligning the Business and Information Technology

The following diagram illustrates how ITSM enables business processes and objectives by aligning business needs and objectives with IT services and deliverables.

ITSM Puts the Pieces Together



continued on next page

IT Service Management (ITSM) Overview continued

Essential Characteristics of ITSM

The following characteristics are essential for quality, goal-focused IT Service Management:

A. Customer focus

- IT goals aligned with business goals
- With IT as an enabler of business processes

B. Process orientation

- With predictable outcomes
- With measurable operational excellence

C. Proactive Service Management

- IT organization guarantees and maintains mutually agreed service levels
- Strong *service delivery & service support*

D. Optimized cost/performance

- IT spending in line with business drivers, such as:
 - Optimizing business processes and procedures (controlling costs through increased efficiency)
 - Improving quality of product/service offering
 - Value-additions to business processes (e-commerce applications, bar coded asset tracking, POS systems)
 - Enabling growth and change (leveraging technology to expand into new markets or deepen existing markets)
 - Matching IT costs and business value
 - Justifying IT expenses

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IT Service Management (ITSM) Overview continued

Definition of an IT Service

An IT Service is whatever the customer (end-user) perceives it to be.

Most users perceive the service from end-to-end. Remember not to mistake an IT system for the whole IT Service.

An IT Service is often made up of many systems, processes, and people.

For example, say you provide e-mail as a service:

E-mail Service =

Systems > e-mail server > network service > WAN > LAN >
Internet access

+

People > technicians > service representatives > IT managers

+

Processes > functional requirements > maintenance > upgrades >
how-to guidance > customer service



The customer only sees the E-mail service.

Note: If a network connection or DNS server is down, but the e-mail server is still running. To the customer, the service is *down*. Similarly, if they are on hold for so long with Service Desk that they abandon the call, to them the IT organization has *no* customer service.

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IT Service Management (ITSM) Overview continued

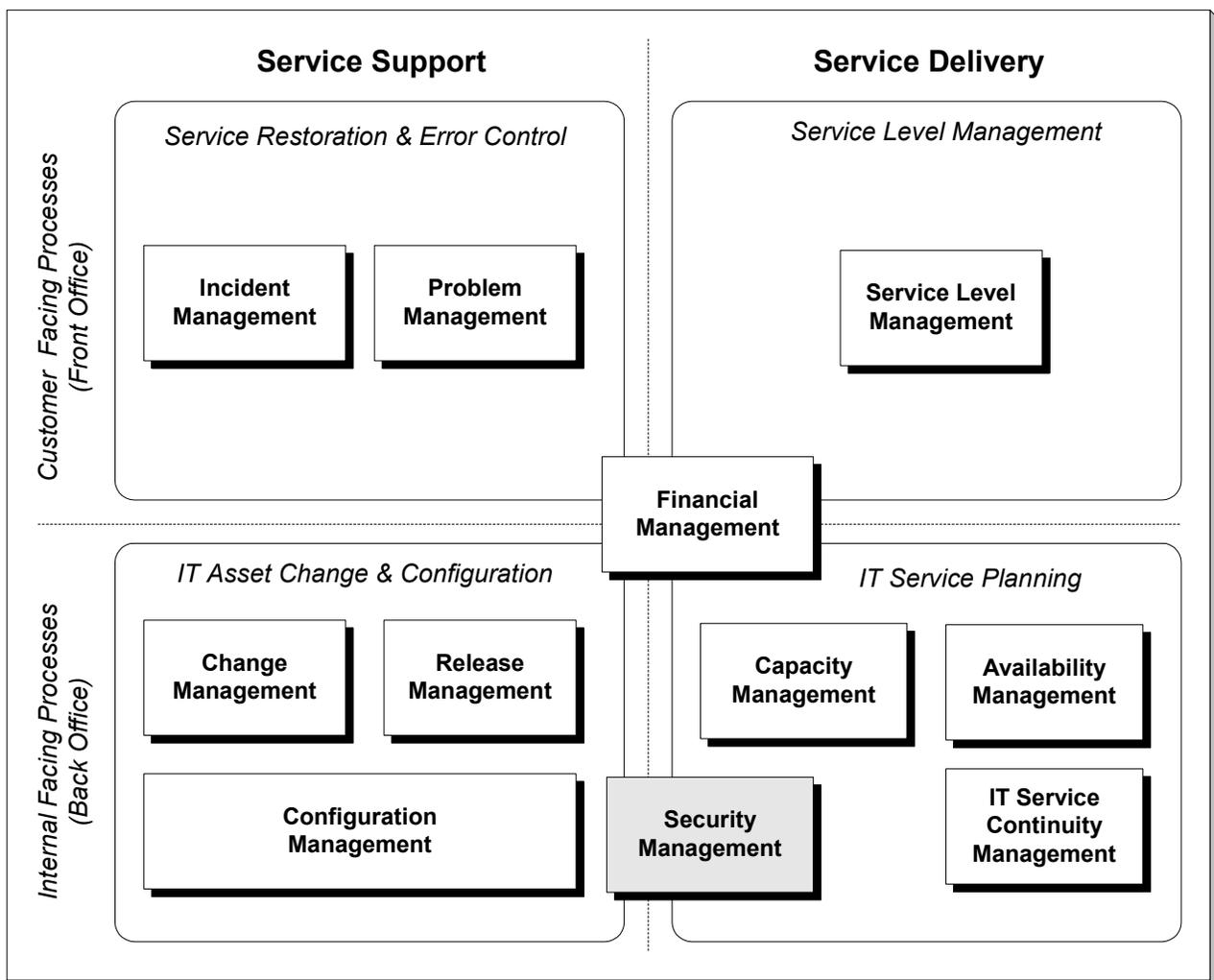
An ITSM Model

IT Service Management can be divided into two core areas:

- Service Support
- Service Delivery

The following diagram details the ITSM processes that fall within each of these two areas. Service Support and Service Delivery are further broken down into customer-facing (front office) and internal-facing (back office) processes.

Figure 1 - IT Service Support & Delivery Model



continued on next page

IT Service Management (ITSM) Overview continued

IT Service Support and Delivery



Service Support processes are responsible for the day-to-day operation and support of IT Services.

Service Delivery processes are responsible for the long-term planning and improvement of IT service provision.

Notes:

Service Support and Delivery will be covered in detail later in this appendix.

Additionally, there is an ITIL publication regarding Security Management.

Security processes are implemented as far as possible into the other processes.

How MXES for IT Supports ITIL Processes

The Maximo Enterprise Suite for IT *directly* supports 7 of the 10 processes listed in the table below. (Those identified with a shaded background are supported, but not necessarily Maximo dependent.)

Specifics of how modules/applications within Maximo support each Service Support and Delivery process will be discussed later in this appendix.

ITSM Processes Supported by MXES	
<i>Service Support</i>	<i>Service Delivery</i>
Service Desk*	
Incident Management	Availability Management
Problem Management	Service Level Management
Configuration Management	Financial Management for IT Services
Change Management	Capacity Management
Release Management	IT Service Continuity Management

* Remember that Service Desk is a function and not a process. The Service Desk functional unit owns the Incident Management process.



Notes:

Maximo Enterprise IT is Pink Elephant's *PinkVerify*TM *Enhanced* certified to support the above seven processes.

MXES provides some level of support for the remaining three processes. Maximo can be customized/configured through its Application Designer, DB Configuration, and Maximo Enterprise Adapter (MEA) functionality.

However, such discussion is beyond the scope of this course. Please contact your MRO Software Business Solutions Manager for more information.

ITIL Overview

What Is ITIL?

ITIL is the IT Infrastructure Library. ITIL® is a Registered Trade Mark and a Community Trade Mark of the United Kingdom's Office of Government Commerce (OGC.)

ITIL is a customizable framework of best practices for Information Technology Service Management (ITSM) processes to allow organizations to achieve quality IT service and overcome difficulties associated with the growth and ongoing management of IT systems.

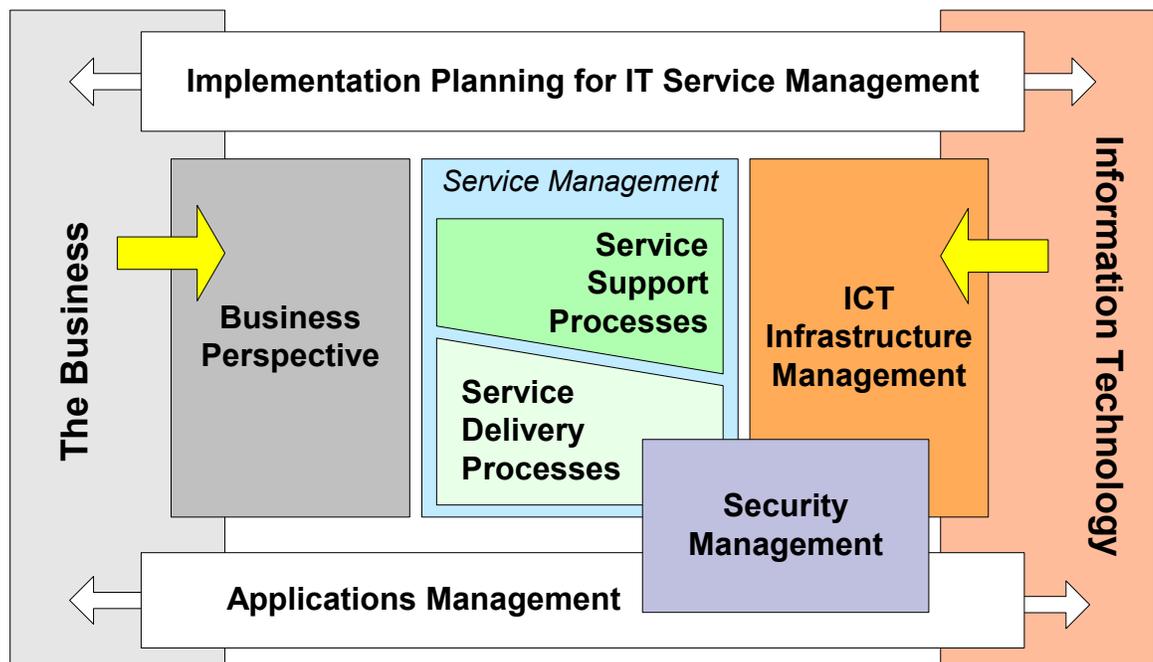
The Structure of ITIL

ITIL is organized into sets of published texts which are defined by related functions: service support, service delivery, managerial, software support, computer operations, security management, and environmental (facilities).

In addition to texts, ITIL services and products include training, guidance, qualifications, software tools, and user groups such as the IT Service Management Forum (*itSMF*.)

ITIL user groups and software tools are vendor neutral.

Figure 2 - The Structure of ITIL



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ITIL Overview continued

What ITIL Is Not

ITIL is *not*:

- a proscriptive standard,
- a methodology, or
- a step-by-step manual.

Implementation of ITSM will vary by organization. ITIL focuses on best practice; as such, it can and should be adapted and adopted in different ways according to each individual organization's needs.

History of ITIL

In the late 1980s, the United Kingdom's Central Computer and Telecommunications Agency (CCTA) created ITIL. By the mid 1990s, ITIL had become a worldwide de facto standard in Service Management. The popularity of ITIL has led it to become a scaleable public domain framework. Very large organizations, very small organizations, and everything in between have implemented ITIL processes.

While owned by the CCTA since the mid-1980s, ITIL is currently maintained and developed by the Office of Government Commerce (OGC).

Why ITIL?

As businesses become more dependent on technology, the need to establish and follow best practices and standards has become increasingly important. ITIL was created in response to the growing dependence on Information Technology to meet business needs, goals, and objectives.

The ITIL framework addresses critical issues such as IT skill-sets, customer service, security requirements, service management, the range and frequency of IT changes, and the increasing need to share information between business units.

An objective third-party evaluation of best practices and standards can help ensure efficient use, management, and deployment of IT assets.

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ITIL Overview continued

Benefits of ITIL

ITIL provides a systematic and professional approach to the management of IT service provision. Adopting its guidance can provide such benefits as:

- Reduced costs and justifiable expenses
 - Improved IT services through the use of proven best practice processes
 - Improved customer satisfaction through more professional service delivery
 - Guidance in optimizing IT infrastructure
 - Improved productivity
 - Increased and/or more efficient use of skills and experience
 - Increased customer confidence in delivered services by using specifications of ITIL or BS15000 as a standard for procurement of services
-

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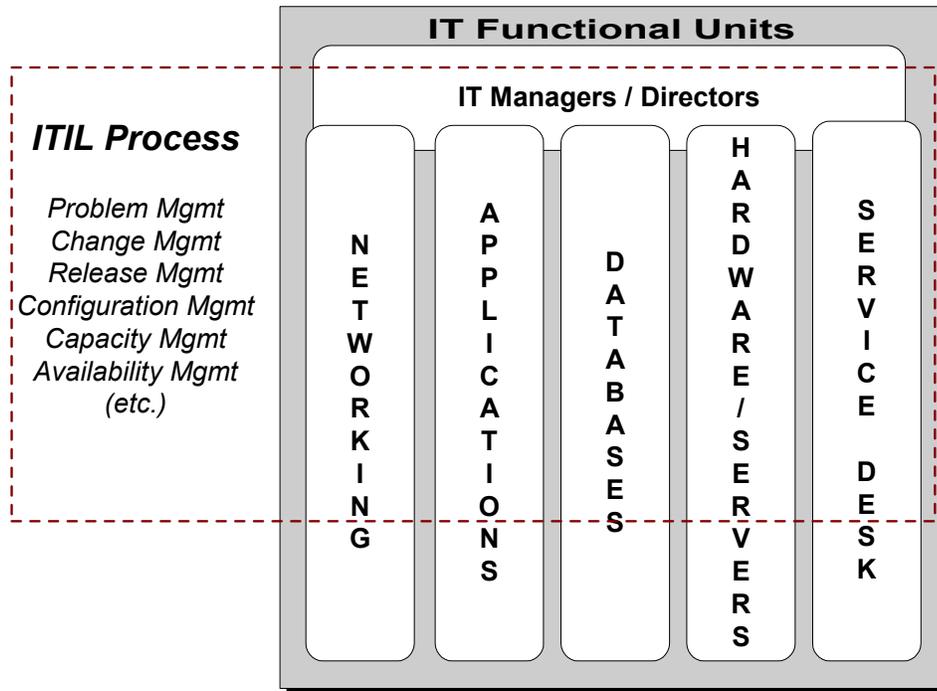
ITIL Overview continued

How ITIL Fits into IT Organizations

- IT organizations are often grouped into functional “silos” by skill-set.
- ITIL processes span the functional units of an IT organization.

This is illustrated below.

Figure 3 - Common IT Organization Structure



- Example 1: *XYZ Service Provider* designates an Agent in its Service Desk group is classified as Level 1 customer support. Junior network services and/or hardware engineers are designated as Level 2 support, while senior engineers in various groups are designated Level 3 support. A user cannot get his office application to work properly (today, it’s suddenly crashing his machine). The Service Desk agent cannot diagnose or correct the problem, so he/she escalates it to Level 2 support in the Applications group. Although they are in different units of the IT organization, both are operating in this case as part of Incident Management.
- Example 2: While changes are designed by a Change officer within IT at *XYZ Service Provider*, he/she relies on the expertise of engineers in all of the groups to provide input for the impact analysis and to coordinate pieces of the rollout. In fact, a member of each group sits on the Change Advisory Board. All groups are now part of Change Management.

ITSM Terminology

Terms

The following table presents the IT terminology used throughout this course.

Term	Definition
<i>Alert</i>	A warning, often automated, that an incident or failure has occurred
<i>Asset</i>	Component of a business process. In Maximo, assets include such things as people, facilities, hardware, software, licenses, networks, and documentation.
<i>Audit Report</i>	A report whose purpose is inspection, verification, and correction. Audits are used to check the economy/efficiency/effectiveness of an activity or process to confirm that it is being carried out to a common standard.
<i>Availability</i>	Ability of a component or service to perform its required function at a stated instant or over a stated period of time. It is usually expressed as the <i>availability ratio</i> , or the proportion of time that the service is available for actual use by the customers within the agreed service times.
<i>Business Impact Analysis (BIA)</i>	The identification of critical business processes, and the potential damage or loss to the business that might be caused to the organization resulting from service or process disruption. Also, the identification of the form loss or damage will likely take; how that loss or damages escalates with time; minimum staffing, facilities, and services needed to enable processes to continue to operate at a minimum acceptable level; and the time within which they must be recovered (both partially and fully).
<i>Business Unit (Function)</i>	A segment of the business entity by which revenues are received and expenditures are caused or controlled, and to which both are measured or attributed.
<i>Change</i>	The addition, modification, or removal of approved, supported, or baselined configuration items. In Maximo, a change is a type of work order.
<i>Change Advisory Board (CAB)</i>	A group of people responsible for assessing from both a business and technical viewpoint all requests for change (RFCs). Advises on RPF priorities, maintains schedule of changes, and proposes resource/personnel requirements to implement changes.
<i>Charging</i>	The process of establishing charges in respect of business goals to recover costs of IT services.

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ITSM Terminology continued

Terms continued

Term	Definition
<i>Classification</i>	Formal identification of incidents, problems, and known errors by origin, symptom, and root cause.
<i>CMDB</i>	A database that contains all relevant details of each CI and details of the important relationships between CIs.
<i>Configuration item (CI)</i> 	A component of an infrastructure, or an item such as a request for change, associated with an infrastructure that is (or will be) under the control of Configuration Management. <u>Note:</u> Maximo refers to CIs as 'Assets.'
<i>Customer</i>	Recipient of the service. Usually the Customer management has responsibility for the funding of the service.
<i>Definitive Hardware Store (DHS)</i>	A library where all authorized hardware components are held in their definitive state.
<i>Definitive Software Library (DSL)</i>	A library where all quality-controlled versions of all software configuration items are held in their definitive, i.e., licensed, form.
<i>Delta release</i>	A release that contains only those items that have changed or been repaired since their last recorded version.
<i>Dependency</i>	Reliance of one process or activity, directly or indirectly, on another.
<i>Disaster Recovery (DR)</i>	Processes focused on the recovery of services primarily in response to physical disasters as defined by IT Service Continuity Management.
<i>Discovery Tool</i>	Software that scans and reports against an IT infrastructure for deployed assets.
<i>Error (or known error)</i>	A condition identified by the successful diagnosis of the root cause of a problem, indicating that an infrastructure component, i.e., CI, is at fault.
<i>Error control</i>	Identifying, recording, classifying and progressing known errors, up to and including resolution by successful replacement/change.
<i>Escalation</i>	Passing information to and/or requesting action from a more senior staff or specialist regarding an incident, problem, or change.

continued on next page

ITSM Terminology continued

Terms continued

Term	Definition
<i>Failure</i>	The termination of the functional unit's ability to perform its required function.
<i>Full release</i>	A release that replaces all components of a release unit, regardless of whether or not they have changed since their last recorded version.
<i>ICT</i>	Information & Communications Technology. The convergence of IT, telecom, data, and networking technologies into a single technology.
<i>Incident</i>	Any event that is not part of the standard operation of a service and that causes, or might cause, an interruption to, or a reduction in, the quality of that service. In Maximo, an incident record is a type of service ticket.
<i>Knowledge-base</i>	Database that captures and ensures that the intellectual capabilities of an organization, such as solutions and workarounds, are shared, maintained and institutionalized.
<i>MACs</i>	An acronym for "Moves, adds and changes" that denotes activities in maintaining IT assets.
<i>Operating Level Agreement (OLA)</i>	An internal agreement covering the delivery of services that support the IT organization in their business-aligned delivery of services.
<i>Package release</i>	A combination of more than one delta or full release.
<i>Problem</i>	An unknown underlying cause of one or more incidents.
<i>Provider</i>	The unit responsible for the provision of IT services.
<i>Reconciliation</i>	Action that matches deployed IT assets to planned, or authorized, IT assets.
<i>Release</i>	A collection of new and/or changed CIs, which are tested and introduced into the production environment together. In Maximo, a release is a type of work order.

continued on next page

ITSM Terminology continued

Terms continued

Term	Definition
<i>Service</i>	The deliverable of the IT Services organization as perceived by its customers (end-to-end). This can include several systems or services in combination.
<i>Service Catalog</i>	Written statement of agreed-upon IT services, default levels, and options.
<i>Service Desk</i>	Single point of contact for customers. Its aim is to restore service as quickly as possible for the user.
<i>Service Level Agreement (SLA)</i>	A formal negotiated document that defines in quantitative terms the service being offered to a customer by the service provider.
<i>Service ticket (or ticket)</i>	In Maximo, any one of the following: a Service Request (SR) that leads to creation of an Incident, Problem, or Release record.
<i>Solution</i>	A remedy to a known error, documented and provided through the knowledge base to the service desk or to users as a self-service option.
<i>Supplier</i>	A third party responsible for supplying or supporting underpinning elements of the IT services.
<i>Underpinning Contract (UC)</i>	A contract with an external supplier covering delivery of services that support the IT organization in its delivery of services.
<i>User</i>	The person using the service on a daily basis.
<i>Work-around</i>	Method of resolving an incident or avoiding a problem, either from implementing a temporary fix to restore service quickly, or because the customer no longer uses a particular component/aspect of the service known to have a problem.
<i>Work Order</i>	A work order specifies particular tasks to be accomplished, and the labor, materials, services, and tools needed to complete the work. Changes and Releases are types of work orders in Maximo. When you create a work order, Maximo captures a historical record of work requested and performed.
<i>Workflow Diagram</i>	<p>A workflow diagram maps out the way the work is currently done, showing each step taken, the decision branches, time spent, distance traveled or people contacted.</p> <p>The Workflow functionality in MXES allows Maximo users to automate the process described in a workflow diagram.</p>

MXES and ITSM

Introduction

Much has been said about the merits of looking at the “three Ps” (people, processes, and products) of IT service delivery independently.

In attempts to implement ITSM using the ITIL framework, many companies overlook the opportunity to use software (products) to improve parts of the service support processes—for example, automation via a Workflow tool—while they are describing and documenting the processes such software is to support.

How MXES Supports Current Industry Needs

MXES has been designed to meet current ITSM needs from both a business and a technical perspective.

Industry Need	How MXES Supports the Need
Establish and follow best practices and standards	Designed to take full advantage of the ITIL best practice framework using out of the box product functionality and product flexibility
Manage broad end-user/customer requests, changes, issues, etc.	<ul style="list-style-type: none"> • Different types of tickets/service requests/work requests to manage the different types of processes within any organization; not only IT, e.g., Facilities, Manufacturing, Aviation, etc. • Provides support for IT Outsource Service Provider who might have above types of clients.
Flexibility in implementation to meet customized processes/business needs	<ul style="list-style-type: none"> • J2EE Web architecture uses a purely XML front end for a high degree of customizability and configurability. • Supports SOA and Web Services • Built-in tools such as the Application Designer and DB Configuration allow customers to tailor and/or extend Maximo functionality to suit their needs

continued on next page

MXES and ITSM continued

How MXES Supports Current Industry Needs continued

Industry Need	How Maximo Supports the Need
Manage IT services provided to the Business Units	Extensible DB structure that allows: <ul style="list-style-type: none"> • Tickets and Work Orders to be related to each other as well as related to CIs in the CMDB, service level agreements, and contracts. • Maximo functions as broad CMDB that provides the single point of contact to receive requests from end-users regardless of the nature of the issue or request • All Contracts, Requests for Quotations, Purchase Orders, Leases, Documentation, Training materials, and others can be stored and managed in Maximo as well as IT assets and service transactions • MACs, (Moves, Adds, and Changes) for all configuration items can be controlled and managed in Maximo. • Invoice and Billing can originate from Maximo.
Process automation	<ul style="list-style-type: none"> • Powerful and configurable Workflow, escalation, and notifications features provide the ability to adapt the system to business processes. No need for step-by-step manual process; workflow automatically drives users through the predefined processes. • Automated, action option based system allows administrators to manage the end-user product “experience” in support of a business process.
Manage and minimize IT costs	<ul style="list-style-type: none"> • Bulletin Board, Knowledge Base, Solutions Library to promote self-service and reduce calls to Service Desk. • Global issues – One parent ticket can manage many. • Ticket templates / job plans – reduce data entry. • Resource tracking – measure and manage how resources (people, material, tools, services, data, documents) are used.

continued on next page

MXES and ITSM continued**How MXES
Supports Current
Industry Needs** continued

Industry Need	How Maximo Supports the Need
Wide integration capability	Maximo Enterprise Adapter allows straightforward integration with third-party systems, including: <ul style="list-style-type: none"> • Out of the box and expandable ERP system integrations • Financial applications • Discovery tools (Maximo provides its own tool but also aggregates data from other third party providers) • Distribution software tools • Procurement Systems • Service Desk or Help Desk Systems • Contract Systems • Asset Management Systems (MXES has its own tool but is still open to integrate to other systems)
User and Administrator Interface	<ul style="list-style-type: none"> • 100% Web browser, user-friendly • Administer users, security settings, are contained in single software package • Role and organization based security for Security Compliance.

continued on next page

MXES and ITSM continued

How MXES Supports Current Industry Needs continued

Industry Need	How Maximo Supports the Need
Enhance business productivity and cost efficiency	<ul style="list-style-type: none"> • Reduce and predict IT Infrastructure downtime via controlled and planned, change, release, and configuration management. • Auto-identify priorities based on service, asset, or user, contracts. • Manage and capture costs associated with failures and remedies/solutions or workarounds. • Integrated Service Level Management capability.
Reporting Capability	<ul style="list-style-type: none"> • Easily configurable, front-end generated reporting via Actuate. • Simple setup and display of key performance indicators (KPIs) via KPI Manager function to provide “at-a-glance” information. • Web-based query tool designed to allow end-users of all levels of computing sophistication to issue ad-hoc queries without having to know the location or structure of the underlying data. • e.Report Designer/ e.Report Designer Professional. Reports created in e.Report Designer require no programming. Lets a report developer deliver any information in the database in a customized format. Present reports in any conceivable layout, regardless of complexity. • Maximo e.Spreadsheet Designer lets business users build reports rapidly, using a unique environment that closely resembles MS Excel.

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MXES and ITSM continued

Service Delivery and Support Revisited

Recall our earlier IT Delivery and Support model in Figure 1 - IT Service Support & Delivery Model on page A-5.

There are five processes in the *Service Support* area:

- Incident Management
- Problem Management
- Change Management
- Release Management
- Configuration Management

These five processes, along with the Service Desk function, are interrelated.

Additionally, there are five processes in the *Service Delivery* area:

- Service Level Management
- Availability Management
- Capacity Management
- IT Service Continuity Management
- Financial Management



Note: Additionally, there is an ITIL publication regarding Security Management. All of the Management Areas are interdependent and influenced by security. Security processes are implemented as far as possible into the other processes.

MXES and Service Support continued

How Maximo Applications Act on the Database

Maximo applications function either to *build* or to *act on* the database (CMDB). Although many applications in a given ITSM process will build *or* act on the database, some applications can do both.

- Processes that primarily build the database create *transactional* data.
- Processes that primarily act on the database create *configuration/setup* data.

Relating Maximo Applications/ Functions to Service Support Processes

The following tables list the Service Support processes and functions from Figure 4 - IT Service Support Map on page A-20 in relation to Maximo applications.

Each process or function corresponds to its letter designation on the Map.

Function	Description	Relevant Maximo Applications
CMDB <i>(Maximo)</i> A	Maximo functions as the CMDB. It collects data input from all the <i>transactional</i> processes as well as what was entered as part of <i>configuration/setup</i> , and outputs information for users functioning in all ten ITSM processes.	<ul style="list-style-type: none"> • The Maximo DB
Service Desk B	This function of Maximo owns the Incident Management process and operates as a single point of contact for customers and users who have inquiries or requests. <u>Type of Data Generated:</u> <i>Transactional</i>	<ul style="list-style-type: none"> • Service Desk module • Self-Service module • Solutions library

continued on next page

MXES and Service Support continued

Relating Maximo Applications/
Functions to Service Support Processes continued

Process	Description	Relevant Maximo Applications
<p><i>Incident Management</i></p> <p>C</p>	<p><u>Goal:</u> to coordinate the rapid restoration of the expected level of service, even if the solution is a workaround. This process is owned by the Service Desk function.</p> <p>(<u>Note:</u> this process does <i>not</i> identify underlying root causes and fix errors, nor are incidents escalated into problems, although they may lead to the generation of a problem record.)</p> <p><u>Type of Data Generated:</u> <i>Transactional</i></p>	<ul style="list-style-type: none"> • Use <i>Incidents</i> to create and modify incident records. • Tickets entered via <i>Service Requests</i> may be converted to incidents, if desired. • <i>Workflow</i> and <i>Escalation Manager</i> can automate the flow of tickets through MXES. • <i>Global issues</i> allow one ticket to manage many. • Tie incidents to SLAs.
<p><i>Problem Management</i></p> <p>D</p>	<p><u>Goal:</u> to find the root cause of a problem, or potential problem, and effect the removal of the error from the infrastructure.</p> <p>Create a problem record to record an unknown, underlying root cause of one or more incidents.</p> <p><u>Type of Data Generated:</u> <i>Transactional</i></p>	<ul style="list-style-type: none"> • Use <i>Problems</i> to create and modify problem records. • Record <i>Logs</i> and <i>Failure Classes</i> to capture and track known errors. • Match <i>Problem</i> records to <i>Incidents</i>. • Tie problems to SLAs.

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MXES and Service Support continued

Relating Maximo Applications/ Functions to Service Support Processes

Process	Description	Relevant Maximo Applications
E <i>Change Management</i>	<p><u>Goal</u>: to help maximize the benefits to the business of making changes to the IT infrastructure while minimizing the risks involved in making those changes.</p> <p><u>Type of Data Generated</u>: <i>Transactional</i></p>	<ul style="list-style-type: none"> • Use <i>Change Manager</i> to plan, review, communicate, and deploy changes to existing CIs (IT assets). • Create and maintain a Forward Schedule of Change report. • Also, changes can be created via <i>Work Orders</i>. • Tie changes to SLAs.
F <i>Release Management</i>	<p><u>Goal</u>: to manage the release of authorized versions or configurations of assets into a production environment, for large or critical hardware rollouts, for major software rollouts, and for bundling related sets of changes. Releases detail the tasks, scheduling, and people or groups involved in the release.</p> <p><u>Type of Data Generated</u>: <i>Transactional</i></p>	<ul style="list-style-type: none"> • Use <i>Releases</i> to plan, review, and prepare for large batches of changes to assets. • Also, releases can be managed via <i>Work Orders</i>. • Tie releases to SLAs.
G <i>Configuration Management</i>	<p>Configuration Management is the process of identifying and defining CIs (a.k.a. Assets) in a system, recording and reporting the status of CIs and RFCs, and verifying the completeness and correctness of CIs.</p> <p><u>Type of Data Generated</u>: <i>Configuration/Setup</i> (also supports, records, and reports on <i>Transactional</i> data generated by Change and Release Management)</p>	<ul style="list-style-type: none"> • Use Assets, Discovery, Item Master, Item Assemblies, Locations, Fusion, and Reconciliation applications to maintain your CMDB. • Apply SLAs to assets. • Attach assets to incidents, problems, changes, and releases.

MXES and Service Delivery

Introduction

Service Delivery processes are responsible for the long-term planning and improvement of IT service provision.

Service Delivery Process Map

Figure 5 illustrates interfaces and deliverables for processes within *Service Delivery*. We will refer to this diagram when discussing Service Delivery processes in relation to MXES.



Note: This is a diagram of the relationships between the various Service Delivery processes. This is NOT INTENDED to be a process flow diagram.

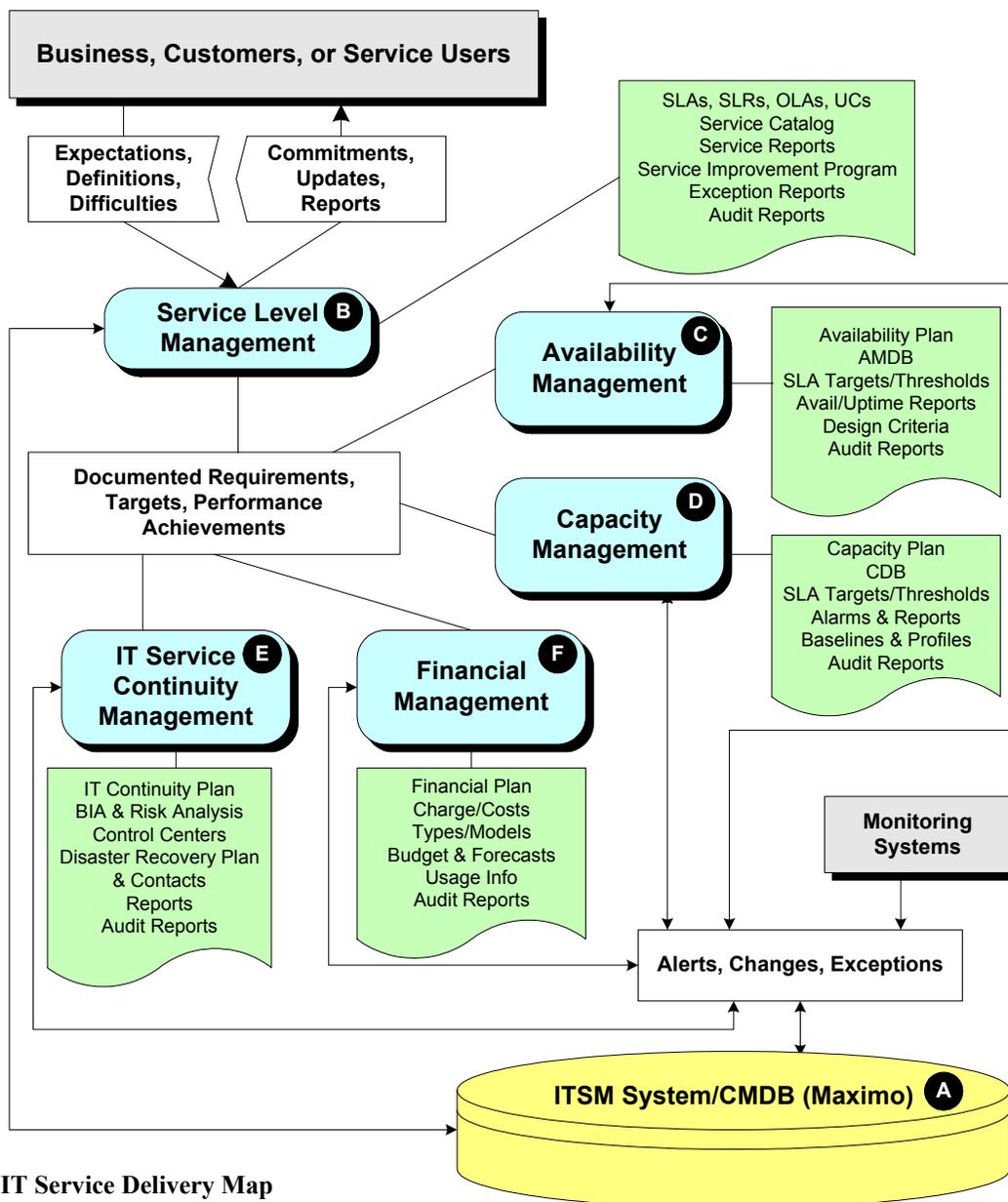


Figure 5 - IT Service Delivery Map

MXES and Service Delivery continued

Relating Maximo Applications/ Functions to Service Delivery Processes

The following tables list the Service Support processes and functions from Figure 5 - IT Service Delivery Map on the previous page in relation to Maximo applications.

Each process or function corresponds to its letter designation on the Map.

Function	Description
<i>ITSM System/CMDB (Maximo)</i> A	<p>Maximo functions as both the CMDB and the IT Service Management System. It collects data input from all the <i>transactional</i> support processes and also stores documentation, such as plans, SLAs, targets, and so forth, that was created during implementation and maintained as part of the Change Management process.</p> <p>Maximo then outputs performance such as reports and KPI information for users functioning in Service Delivery ITSM processes.</p>

Process	Description	Relevant Maximo Applications
<i>Service Level Management</i> B	<p><u>Goal:</u> to establish, maintain, review, and improve business-aligned IT service quality.</p>	<ul style="list-style-type: none"> • Use <i>SLAs</i> to create Service Level Agreements. • Publish and maintain a <i>Service Catalog</i> in Maximo. • SLAs can be applied to assets and transactions. • Use <i>Contracts</i> to set up UCs and OLAs.
<i>Availability Management</i> C	<p><u>Goal:</u> to optimize capabilities of the IT infrastructure and supporting IT organization to deliver a cost-effective, maintainable availability level that meets business objectives and SLAs.</p> <p>You create a problem record to record an unknown, underlying root cause of one or more incidents.</p>	<ul style="list-style-type: none"> • Use <i>KPI Manager</i> to create KPIs, <i>Reports</i> to create management audits such as uptime, downtime, and MTBF. • Attach availability plan and requirements docs to assets. • Use Maximo Discovery to view deployed assets. • Track failure classes and codes and view affected users and assets to make availability assessments.

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MXES and Service Delivery continued

Relating Maximo Applications/ Functions to Service Delivery Processes continued

Process	Description	Relevant Maximo Applications
<p><i>Capacity Management</i></p> <p>D</p>	<p><u>Goal:</u> to optimize the delivery of IT services by managing demand for services to resources.</p>	<ul style="list-style-type: none"> • Use <i>KPI Manager</i> to create KPIs, <i>Reports</i> to create asset, utilization, and procurement data, as well as to develop forecasts. • Work closely with Configuration, Change & Release Management. • <i>Inventory Procurement, Contracts, SLAs, and Reports</i> allow capacity manager to review costs against existing CIs or proposed additions. • Applied SLAs allow Capacity Manager to see current services and current systems available, linked to persons. • Problem, Incident and Change reports allow Capacity Manager to review MACs that impact capacity.

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MXES and Service Delivery continued

Relating Maximo Applications/
Functions to Service Delivery Processes continued

Process	Description	Relevant Maximo Applications
<i>IT Continuity Management</i> E	<u>Goal:</u> to provide a systematic approach to the development of an IT Service Continuity Plan to ensure that IT services are protected or can be restored as quickly as possible after a disaster.	<ul style="list-style-type: none"> • Store baselines of production CIs in CMDB; update through Change Management. • Review baselines against SLAs to set priority for actions to restore services in appropriate order by priority to the business.
<i>Financial Management</i> F	<u>Goal:</u> to understand and control costs associated with the planning, development, delivery, and support of the IT infrastructure, and, if necessary, to recover those costs from the users.	<ul style="list-style-type: none"> • Use Assets, Deployed Assets, Contracts, Labor, and Invoices. • Use <i>Reconciliation and Reports</i> to track usage/cost for chargeback. • Integrate with third-party system via MEA. • Purchasing module shows Total Cost of Ownership of CI or Service. • Costing info such as contracts, procurement, and SLAs assist in budgeting for IT costs.

Name: _____
Class: _____

Instructor: _____
Date: _____

	Excel- lent	Very Good	Good	Fair	Poor	Very Poor
1. The course structure and style was:						
2. The course content was:						
3. The workshops as a whole were:						
4. The length of the course was :						
5. Course organization was:						
6. Relevance and usefulness of course content was:						
7. Opportunity for practicing what was learned was:						
8. Amount you learned in the class was:						
9. The instructor's effectiveness in teaching the subject matter was:						
10. Use of class time was:						
11. Instructor's use of examples and illustrations was:						
12. Instructor's ability to answer student questions was:						
13. Instructor's ability to present alternative explanations when needed was:						
14. Tailoring of instruction to varying student skill levels was:						
15. Instructor demonstrations were:						
16. Instructor's ability to solve unexpected problems was:						

17. Which aspects of this course were most effective? _____

18. Which aspects of this course detracted from your learning? _____

19. What suggestions do you have for improving this course? _____