



Cohesive Information Solutions Inc.





Title: Maximo Adhoc Reporting

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Date: 09/24/2014

Maximo Query Based Reporting (QBR)

- Query Based Reports (QBR) enables the end users in Maximo to meet their Ad hoc Reporting needs.
- These reports provide data to end users which can be further used in their data analysis.
- These can be Summary or Detail reports.
- Can be created from Maximo's front end.
- Requires minimal technical skills.

Maximo Query Based Reporting (QBR)

- These reports are mainly used by small number of users to satisfy their one-off business needs unlike Enterprise reports which can be used by large number of users on daily basis to get work done.
- The user has the flexibility of choosing the columns he wants to see in the end report as well as defining his own grouping, sorting and parameters to a certain level.

Maximo Query Based Reporting (QBR)

- Creation of Ad hoc reports can be initiated from couple of places:
 - Create Report icon in the toolbar menu within an application.
 - Create Report button in the bottom section of the Reports window.
 - Reports Menu on the Start Center.

Find: Select Action     

List Work Order Plans Assignments Related Records Actuals Safety Plan Log Data Sheet Failure Reporting Specifications

Advanced Search Save Query Bookmarks

Work Orders Filter
Work Order Description

Reports

Select a report from the list, or click Create Report to create an ad hoc report.

On Demand Reports | **Scheduling Status**

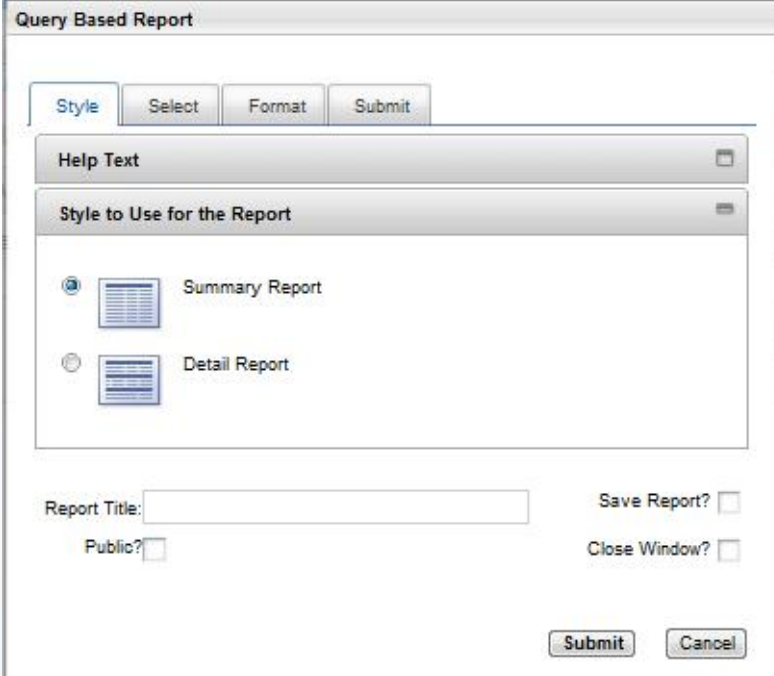
Reports to Run Filter 1 - 5 of 8 Download

Description
1 Open Work Orders and PM
Work Order Details
Calibration Work Order Data Sheet
Estimated vs Actual Work Order Costs
Work Order Hierarchy

Create Report Cancel

QBR Creation

- Four tabs are available in QBR creation to the User to define the report content and layout.
 - Style tab
 - Select tab
 - Format tab
 - Submit tab



The screenshot shows a window titled "Query Based Report" with four tabs: "Style", "Select", "Format", and "Submit". The "Style" tab is active. Below the tabs are two sections: "Help Text" and "Style to Use for the Report". The "Style to Use for the Report" section contains two radio button options: "Summary Report" (selected) and "Detail Report". Below these options are two checkboxes: "Report Title:" and "Public?". At the bottom right, there are two checkboxes: "Save Report?" and "Close Window?". At the very bottom, there are "Submit" and "Cancel" buttons.

QBR Creation

1. Style Tab provides the option to select the report type the User desires. The options are:
 - Summary Report: This report lists data which can be grouped and sorted. Its primary purpose is often to export the data to Microsoft Excel for additional analysis.
 - Detail Report: A Detail report contains details on records, with page breaks separating the record's details and can use multiple 1:N (One to Many) relationships, ie... multiple cardinality.

Query Based Report

Style

Select

Format

Submit

Help Text



Style to Use for the Report



Summary Report



Detail Report

Report Title:

Save Report?



Public?



Close Window?



Submit

Cancel



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QBR Creation

2. Select Tab has 4 sections as shown in the next slide:

- Parent Category
- Query to use in Report
- Available Fields Selection
- Selected Fields Selection

Query Based Report

Style Select Format Submit

Help Text

Parent Category: Asset Details

Apply the Current Query and Filter from the Application?

- Asset Details
 - Specifications
 - Work Orders
 - Meters
 - Status (Must Be Fields)
 - User and Custodian Details
 - Manufacturer
 - Contract Asset Details
 - Inventory
 - Asset Items
 - Asset Safety Plan
 - Location
 - Preventive Maintenance
 - Spare Parts

Available Fields

Field Description	Field Value
Ancestor	ANCESTOR
Asset	ASSETID
Asset Tag	ASSETTAG
Type	ASSETTYPE
ASSETUID	ASSETUID
Automatically Generate Work Orders	AUTOWOGEN

Add All

Selected Fields

Field Order	Report Label	Field Value	Category
1	Asset	ASSETNUM	Asset Details
2	Description	DESCRIPTION	Asset Details
3	Location	LOCATION	Asset Details
4	Loop Location	PLUSCLPLOC	Asset Details
5	Parent	PARENT	Asset Details

Submit

Cancel

QBR Creation

3. Using Format Tab, the User can optionally apply Filters, Grouping and Sorting.

It is required to select the fields in Select tab for them to appear in either filters, grouping or sorting.

User has the option to set 3 Filters or 3 Groupings or 3 Sortings only.

Grouping is available to only Summary Reports.

Query Based Report

Style Select **Format** Submit

Help Text

Filtering

	Category	Report Label	
Filter On Category:	<input type="text"/>	<input type="text"/>	Single Value? <input checked="" type="checkbox"/>
And Also On Category:	<input type="text"/>	<input type="text"/>	Single Value? <input checked="" type="checkbox"/>
And Also On Category:	<input type="text"/>	<input type="text"/>	Single Value? <input checked="" type="checkbox"/>
<input type="button" value="Remove All"/>			

Grouping

	Category	Report Label	
Group First By Category:	<input type="text"/>	<input type="text"/>	Ascending? <input checked="" type="checkbox"/>
And Then By Category:	<input type="text"/>	<input type="text"/>	Ascending? <input checked="" type="checkbox"/>
And Then By Category:	<input type="text"/>	<input type="text"/>	Ascending? <input checked="" type="checkbox"/>
<input type="button" value="Remove All"/>			

Sorting

	Category	Report Label	
Sort First By Category:	<input type="text"/>	<input type="text"/>	Ascending? <input checked="" type="checkbox"/>
And Then By Category:	<input type="text"/>	<input type="text"/>	Ascending? <input checked="" type="checkbox"/>
And Then By Category:	<input type="text"/>	<input type="text"/>	Ascending? <input checked="" type="checkbox"/>
<input type="button" value="Remove All"/>			

QBR Creation

4. Submit tab enables the user to run the report immediately or schedule it to run at a later time. The User can enter values for the filters that are available for the report in this tab.

Query Based Report

Style Select Format **Submit**

Help Text

Enter Filter Values Filter > 0 - 0 of 0 Download

Filter	Value	Single Value
...No rows to display...		

Schedule

Immediate
 At this Time
 Recurring

E-mail

To:
Subject:
Comments:

File Type:
 PDF
 XLS

Report Delivery Format:
 Email with file attachment
 Email with file url

Report Title:
Public?

Save Report?
Close Window?

Submit Cancel

QBR Creation

5. Common fields to all four tabs


- Report Title
- Save Report?
- Public?
- Close Window?


Query Based Report

Style Select Format Submit

Help Text

Style to Use for the Report



 Summary Report

 Detail Report

Report Title: Save Report?

Public? Close Window?

Submit Cancel



Report Object Structures (ROS)

- Report Object Structures (ROS) enables User to select fields from multiple objects to create their Ad hoc reports.
- ROS are designed to enable you to visualize application categories and their parent/child relationships.
- When you access a QBR window, the Report Object Structures are displayed in Parent Category field. Parent Categories are ROS that you have access to.

ROS Creation

- It is very important ROS setup work be done by a developer or administrator who is very familiar with the Maximo database and database concepts.
- Without this knowledge, the ROS can be setup incorrectly, leading to bad or misleading data in the Ad hoc reports.

ROS Creation

1. Go To → Integration → Object Structures.
2. Click on 'New Object Structure' icon on the tool bar to create a new record.
3. Enter Object Structure, Description, and Consumed By as 'REPORTING'. Select the Application where you need to enable this new ROS.
4. All other header fields should be left null.

ROS Creation

5. Click on New Row in Source Objects section to create the Parent Object required for the new ROS. You will not be able to save this ROS until at least one object is added to Source Objects section.
6. Select the main object name in the Object field.
7. The Parent Source Object must have a Parent Object of null and have an Object Order of 1.

ROS Creation

8. Next, any child or grandchildren categories must be defined as Source Objects to the parent.

9. The child and grandchildren objects should have associated value for the parent in Parent Object field.

10. Select the Relationship between the Parent and the Child Table by clicking on the relationship lookup.

ROS Creation

11. The Cardinality and Database Join Required? fields should be defined.

12. Click New Row again and repeat this process of adding a Source Object for the child or grandchildren objects you wish to create and save the ROS.

13. You need to specify which Security Groups has access to the newly created ROS. This is done from Report Administration application.

ROS Creation

14. Go To → Administration → Reporting → Report Administration.

15. From Select Action menu, Set Report Object Security.

16. Select the ROS in the top section and click on New Row in the bottom section to provide valid Security Groups which will have access to this ROS.

Report Object Structure Security

Report Object Structures Filter > 1 - 5 of 37 Download

Object Structure	Description	Application
REP_ASSET	Asset Details	Assets
REP_ASSETACTIVITY	Asset Activity	Assets
REP_ASSETHIERARCHY	Asset Hierarchy	Assets
REP_CLASS	Classification Details	Classifications
REP_CONDM	Condition Monitoring Details	Condition Monitoring

Report Object Structure Security Filter > 1 - 2 of 2 Download

Group	Description
MAXADMIN	Maximo Administrators (Super Users)
OPSMGR	Operations Manager

New Row

OK Cancel

Questions ?

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