

Inspections with Maximo Work Centers

Overview of the Inspection Work Center Functionality

GoMaximo 2022

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About the Presenter – Tom Peterson

- A Computer Engineer and IBM Certified Deployment Professional with over 11 years of Maximo development and database experience based out of Alberta, Canada.
- Worked with clients mostly in the Oil and Gas industry on numerous Maximo Projects involving clients in Canada, United States, and the Middle East.

Questions on Maximo? Email: Tom.Peterson@cohesivegroup.com

Agenda

- Capabilities of Maximo Inspection Work Centers
 - Setting up inspection forms
 - Deploying through Preventative Maintenance and Job Plan applications
 - Unscheduled Inspections
- Taking Actions
- Conditional Inspection Questions
- Work Center Q & A

Performing Inspections

Whether Scheduled or Unscheduled, inspections are completed in an inspection 'result' record

Inspections results are inspection forms (templates) applied to an asset / location at a point in time.

A single asset may have many inspection results completed over time (Inspection History)

An inspection form may be applied to many assets / locations, many times.

Performing Inspections

IBM Maximo Asset Management Conduct an Inspection

Inspections

Pending In Progress

+ Unscheduled inspection

3 Results

Daily Maintenance and Inspection Log for Work Equipment 1026 BR460 Burner, Gas Fired- For B... Created Date: 8/13/19 11:02 AM Due Date: <i>Unspecified</i>	Monthly Fire System Inspection 2 1012 1002 Fire Extinguisher Created Date: 8/12/19 11:02 AM Due Date: <i>Unspecified</i>	Monthly Fire System Inspection 2 1008 1003 Fire Extinguisher Created Date: 8/11/19 11:02 AM Due Date: <i>Unspecified</i>
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Performing Inspections

IBM Maximo Asset Management Conduct an Inspection

Inspections

Pending In Progress

Create an Inspection

Step 1: Specify the asset or location

Search: pump

Centrifugal Pump 100 GPM, 60 FT-HD	(2077)
Centrifugal Pump 100GPM/60FT HD	(11430)
Centrifugal Pump 100GPM/60FTHD	(11450)
Rotary PD Pump, 100 GPM, Asceptic	(2111)
Rotary PD Pump, 100 GPM, Asceptic	(2110)
Rotary PD Pump, 100 GPM, Asceptic	(2109)

Monthly Fire System Inspection 2
1008
1003 Fire Extinguisher
Created Date: 8/11/19 11:02 AM
Due Date: *Unspecified*

Performing Inspections

IBM Maximo Asset Management Conduct an Inspection

Inspections

Pending In Progress

Create an Inspection

Step 1: Specify the asset or location

Asset Location

pump

- Centrifugal Pump 100 GPM, 60 FT-HD (2077)
- Centrifugal Pump 100GPM/60FT HD (11430)
- Centrifugal Pump 100GPM/60FTHD
- Rotary PD Pump, 100 GPM, Asceptic
- Rotary PD Pump, 100 GPM, Asceptic

Step 2: Select an inspection form

Search Recommended

Inspection_1

Monthly Fire System Inspection 2 1008
1003 Fire Extinguisher
Created Date: 8/11/18 11:02 AM

+ Unscheduled inspection

Performing Inspections

IBM Maximo Asset Management Conduct an Inspection

Hide optional questions? No Inspection_1

All Incomplete Completed

Inspection_1
11430 Centrifugal Pump 100GPM/60FT HD

- *1. Enter a Date/Time of Inspection
- 2. Enter Asset Meter Readings
- *3. Temperature

* 1. Enter a Date/Time of Inspection

*Data / Time

2. Enter Asset Meter Readings

Run Hours Rollover

Enter meter reading

Outlet Pressure

Enter meter reading

* 3. Temperature

*Temperation Status

- ✓ Within Limits
- ! Warning
- ✗ Critical

Air Temp

Enter numeric answer

View Inspection Progress

Performing Inspections

IBM Maximo Asset Management Conduct an Inspection

Hide optional questions? No Inspection_1 ⓘ

All Incomplete Completed >

Inspection_1
11430 Centrifugal Pump 100GPM/60FT HD

- *1. Enter a Date/Time of Inspection
- 2. Enter Asset Meter Readings
- *3. Temperature

*1. Enter a Date/Time of Inspection

*Data / Time

-/-/ - :--

2. Enter Asset Meter Readings

Run Hours Rollover

Enter meter reading

Outlet Pressure

Enter meter reading

*3. Temperature ⓘ

*Temperation Status

- Within Limits
- Warning
- Critical

Air Temp

Enter numeric answer

Many Question Types

- Date / Time (both or either)
- File Uploads
- Text
- Numerical
- Selectable Responses

Performing Inspections

IBM Maximo Asset Management Conduct an Inspection

Hide optional questions? No Inspection_1

All Incomplete Completed

Inspection_1
11430 Centrifugal Pump 100GPM/60FT HD

*1. Enter a Date/Time of Inspection

*Data / Time

--/--

*2. Enter Asset Meter Readings

Run Hours
Enter meter reading

Outlet Pressure
Enter meter reading

Rollover

*3. Temperature

*Temperation Status

Within Limits
 Warning
 Critical

Air Temp
Enter numeric answer

Enter Meter Readings

Note: This only applies if the associated asset / location has the appropriate meters associated.

Performing Inspections

* 1. Enter a Date/Time of Inspection

*Data / Time

1/9/20 1:00 PM

2. Enter Asset Meter Readings

Run Hours
55100

Outlet Pressure
15

* 3. Temperature ⓘ

*Temperation Status

✓ Within Limits

! Warning

✗ Critical

Air Temp
78

* 1. Enter a Date/Time of Inspection

*Data / Time

1/9/20 1:00 PM

2. Enter Asset Meter Readings

Run Hours
55100

Outlet Pressure
15

* 3. Temperature ⓘ

*Temperation Status

✓ Within Limits

! Warning

✗ Critical

*Air Temp
78

*Drive End Bearing Temp
Enter numeric answer


*Non-Drive End Bearing Temp
Enter numeric answer

Conditional Forms

Performing Inspections

3/3 Total • 2/2 Required

< Save and exit **Complete** >



Completed Inspections Summary

Inspection_1 Centrifugal Pump 100GPM/60FT HD	Take Action >
Completed on 1/10/20 11:24 AM by WILSON	

< Exit **Batch Actions** >

Take Action >

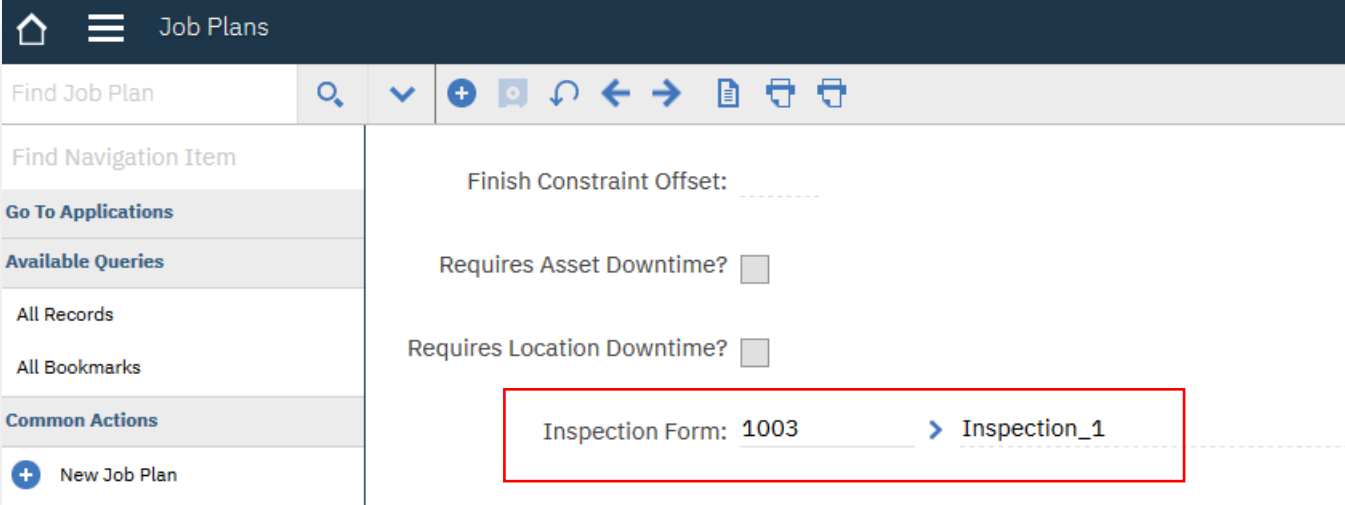
→ Create WO for items that re

Scheduling Inspections

- Associating Inspections Maximo Objects
 - Work Orders
 - Job Plans
 - Preventative Maintenance Records

Scheduling Inspections

An inspection form can be applied to a Job Plan, that will now act as the Inspection Job Plan. Every work order associated to this job plan will have an inspection form created on it's behalf.



The screenshot displays the 'Job Plans' interface. On the left is a navigation sidebar with sections: 'Go To Applications', 'Available Queries' (containing 'All Records' and 'All Bookmarks'), 'Common Actions', and 'New Job Plan'. The main content area includes a search bar 'Find Job Plan', a toolbar with icons for add, view, refresh, back, forward, and print, and a 'Find Navigation Item' field. Below these are configuration options: 'Finish Constraint Offset: _____', 'Requires Asset Downtime?' with an unchecked checkbox, and 'Requires Location Downtime?' with an unchecked checkbox. A red box highlights the 'Inspection Form: 1003' field, which has a blue arrow pointing to 'Inspection_1'.

Scheduling Inspections

An inspection Job Plan can be applied to a PM.

All PM Work Generated will automatically have an inspection form that users can navigate to directly from the work order.

The screenshot displays the 'Preventive Maintenance' software interface. The top navigation bar includes a home icon, a menu icon (highlighted with a mouse cursor), and the title 'Preventive Maintenance'. Below the navigation bar is a search bar labeled 'Find PM' and a 'Find Navigation Item' section. The main content area is divided into several sections: 'Go To Applications', 'Available Queries' (with options for 'All Records' and 'All Bookmarks'), and 'Common Actions' (with options for 'New PM', 'Save PM', 'Clear Changes', and 'Change Status'). The right-hand side of the interface shows a form for 'Work Order Information' with the following fields: 'Asset: 11430' (with a dropdown arrow) pointing to 'Centrifugal Pump 100GPM/60FT HD', 'Route: _____' (with a dropdown arrow), 'Job Plan: INSP' (with a dropdown arrow and highlighted by a red box), 'Description:', 'Work Type: _____' (with a search icon), 'Last Start Date:', '+ Work Order Status: WSCH' (with a search icon), and 'Last Completion Date:'.

Scheduling Inspections

Inspection forms can be found on the work order application under the Job Details section.

Job Details

Job Plan: INSP >

Job Plan Revision #: 0

PM: 1020 >

Safety Plan: >

Contract: >

Inspection Form: 1003 > Inspection_1

Inspection Result: 1001 >

Total Work Units: 1.00

Go To Conduct an Inspection

Creating Inspections

- Inspection Form Design
 - Question Types
 - Conditional Design
 - Actions



Creating Inspections

Form Name

- Enter a form name

Form Instructions

- Give users some guidance on filling out the form

Form Type (informational)

- Audit
- Condition Assessment
- Inspection
- Investigation

IBM Maximo Asset Manager Manage Inspection Forms

* Name *Enter a form name*

Select a form type ▼ [Form instructions](#) Status: Draft Revision: 1

Select a form type

Audit

Condition assessment

Inspection

Investigation

Create Groups [+ Add Question](#)

Required?

Enter a form name and begin adding questions.


[← Back](#) [Save](#)




About

Creating Inspections

Enter Form Instructions to help guide users

* Name CanMUG 2020 Inspection

Inspection ▶  Form instructions Status: Draft Revision: 1

B *I* U A ▾   

We need feedback on the CanMUG training assets. Please provide answers to all questions with detail.

Cancel **Save**

Creating Inspections

Creating Questions – Determining Questions Types

The screenshot displays a mobile application interface for creating inspections. On the left, a 'Response Fields' menu is visible, listing various question types under several categories:

- Asset data
 - Meter readings
- Date entry
 - Date and time
 - Date only
 - Time only
- Media
 - File upload
- Numeric entry
 - Single numeric entry
- Selectable responses
 - Single choice
- Text entry
 - Text response

The right side of the interface features a 'Question' input field with a placeholder text 'Enter a question'. Below the input field is a large, faint bee icon and the text 'Get started by entering a form question'. At the bottom of the screen, there are two buttons: 'Cancel' and 'Done'.

Creating Inspections

Single choice fields:

- Add Icons / Color
- Add Require Action – This drives functionality at the end of an inspection.
- Conditional Fields on the inspection can be associated with single choice responses.

The screenshot displays the configuration interface for a single choice question. On the left, a sidebar titled "Response Fields" lists various field types, with "Single choice" selected under "Selectable responses". The main area shows a question titled "File Attachment" with the description "Is a photo available?". Two options are defined: "Yes" with a green background and a checkmark icon, and "No" with a pink background and an 'X' icon. The "Yes" option is marked as required (indicated by a red asterisk and a checked radio button) and has a "Require action" toggle set to "No". The "No" option is not required and has its "Require action" toggle also set to "No". Below the options, there are "Required?" and "Visible?" toggles, both set to "Yes". An "Example" preview on the right shows the visual representation of the options. At the bottom, there are "Cancel" and "Done" buttons, and a note stating "You can add an additional response field for the question."

Creating Inspections

File Upload

- Select Document Folder

The screenshot shows a form titled "2. File upload". At the top right, there are icons for deleting and copying. The main section is labeled "* Select document folder" and contains a dropdown menu with "Photos" selected and a blue play button icon. Below this are two toggle switches: "Required?" (set to "No") and "Visible?" (set to "No"). On the right side, there is an "Example:" section with the text "Upload an attachment" and a blue button with a plus sign labeled "Add attachment".

Date / Time

- Choose between either date or time or date/time combination

The screenshot shows a form titled "1. Date only". At the top left, it says "* Question Date of Inspection". Below this is a horizontal line. The form is titled "1. Date only" and has a "Description" field with the text "Enter a Date". Below the description are two toggle switches: "Required?" (set to "Yes") and "Visible?" (set to "Yes"). On the right side, there is an "Example:" section with the text "Enter a Date" and a date input field showing "--/--" and a calendar icon.

Creating Inspections

- You can have multiple responses per question
- Each response can be flagged as visible and/or required

* Question Information

1. Single numeric entry

Description How Many Attendees are in the class?

Required? No Visible? Yes

2. Text response
















Description Are people learning lots?

Required? No Visible? Yes

Creating Inspections

Each question can have specific instructions applied

Form Questions Create Groups [+ Add Question](#)

Number	Question	Required?	
<input type="checkbox"/> 1	File Attachment	Yes	   
<div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> A _ ▼   </p><p>Determine whether a photo attachment can be uploaded. If there is a photo upload the photo in the dialog.</p></div> <p style="text-align: right;">Cancel Save</p>			
<input type="checkbox"/> 2	Date of Inspection	Yes	   
<input type="checkbox"/> 3	Information	No	   

Creating Inspections

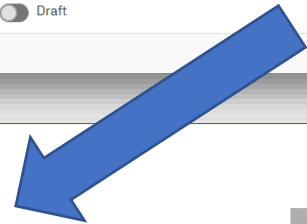
CanMUG 2020 Inspection 1007

Revision History

Revision	Revision Date	Revised by	Reason	Status
1	1/10/20 3:20 PM	WILSON		<input type="checkbox"/> Draft

Create revision

Conditional Settings



Response Fields Settings

Add logic to the questions setup on the inspection form.

Add Condition

Groups and Questions

- CanMUG 2020 Inspection
 - 1. File Attachment
 - 1.01. Is a photo available?
 - 2. Date of Inspection
 - 3. Information

Condition 1

If answer is

Response Field

Is Visible Required

Save

< Back




Creating Inspections

The screenshot displays the 'CanMUG 2020 Inspection' interface. At the top, there is a header with 'CanMUG 2020 Inspection 1007' and 'Revision History'. A 'Create revision' button is visible in the top right. Below the header is a table with columns: 'Revision', 'Revision Date', 'Revised by Reason', and 'Status'. The 'Status' column shows a toggle switch set to 'Active' and a settings gear icon highlighted with a red box.

The 'Form settings' dialog is open, showing options for 'Available actions' and 'Selected actions'. The 'Available actions' list includes 'Automation scripts' and 'OSACTION.MXAPIINSPRESULT.CREATEWO Create WO for items that require action', with the latter highlighted by a red box. An 'Add' button with a right arrow and the text 'Single or Multiple' is positioned between the two lists. The 'Selected actions' list is currently empty, displaying 'No records' and a bee icon. A 'Reset' button is located at the top right of the 'Selected actions' list. At the bottom of the dialog, there are two toggle switches: 'Audio enabled form' and 'Require reading confirmation', both set to 'No'. A 'Done' button is at the bottom center.

Creating Inspections

CanMUG 2020 Inspection 1007 Revision History Create revision

Revision	Revision Date	Revised by Reason	Status	
1	1/10/20 3:20 PM	WILSON	<input checked="" type="checkbox"/> Active	  

More Information



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Request a Complimentary Maximo Assessment

A Maximo Assessment
increases the
effectiveness of your
system usage and
identifies areas for
improvement.

