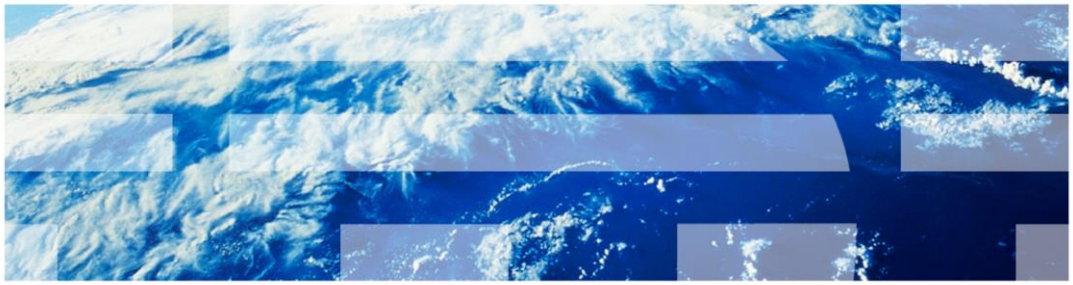
IBM Maximo Asset Management V7.1

Routing a workflow process through an escalation



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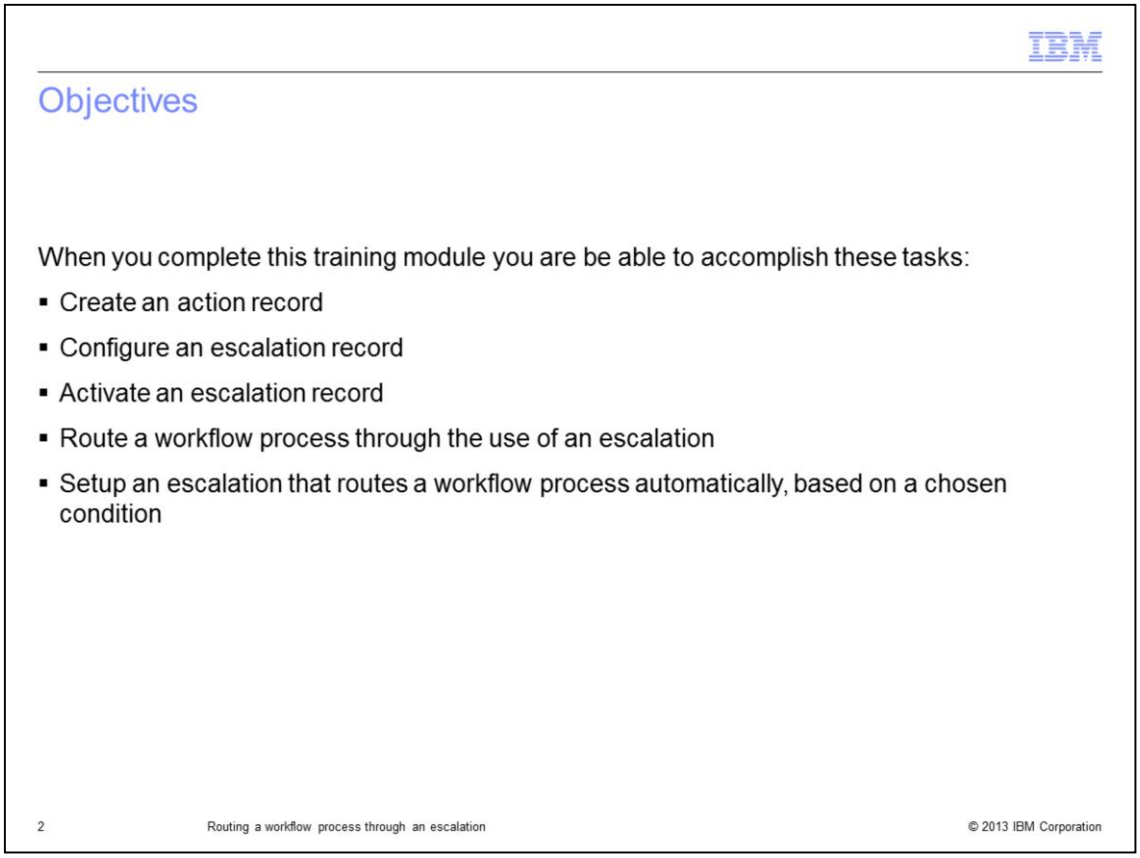
This is a training module for Maximo Asset Management V7.1. In this module, you learn to automatically route a workflow process, based on a certain condition, through the use of the Maximo user interface.



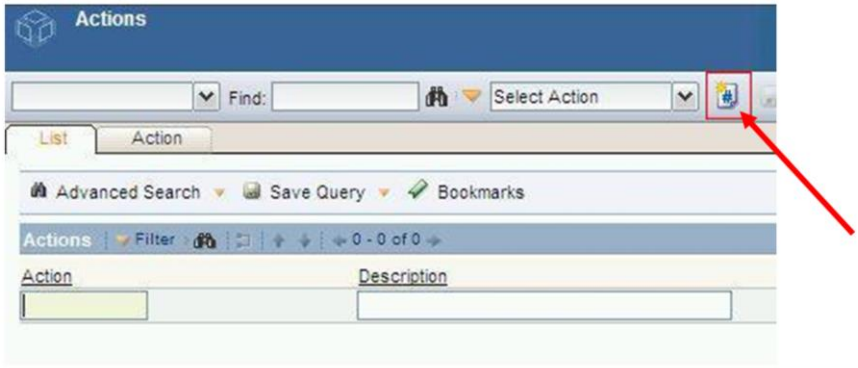
After completing this module, you can perform these tasks:

- Create a new action record
- Create a new escalation record
- Set a schedule for an escalation
- Create a condition statement for an escalation
- Activate an escalation

Creating a new action

In order to add a new action record:

- Click **Go To >System Configuration > Platform Configuration > Actions**
- Click the **New Record** button



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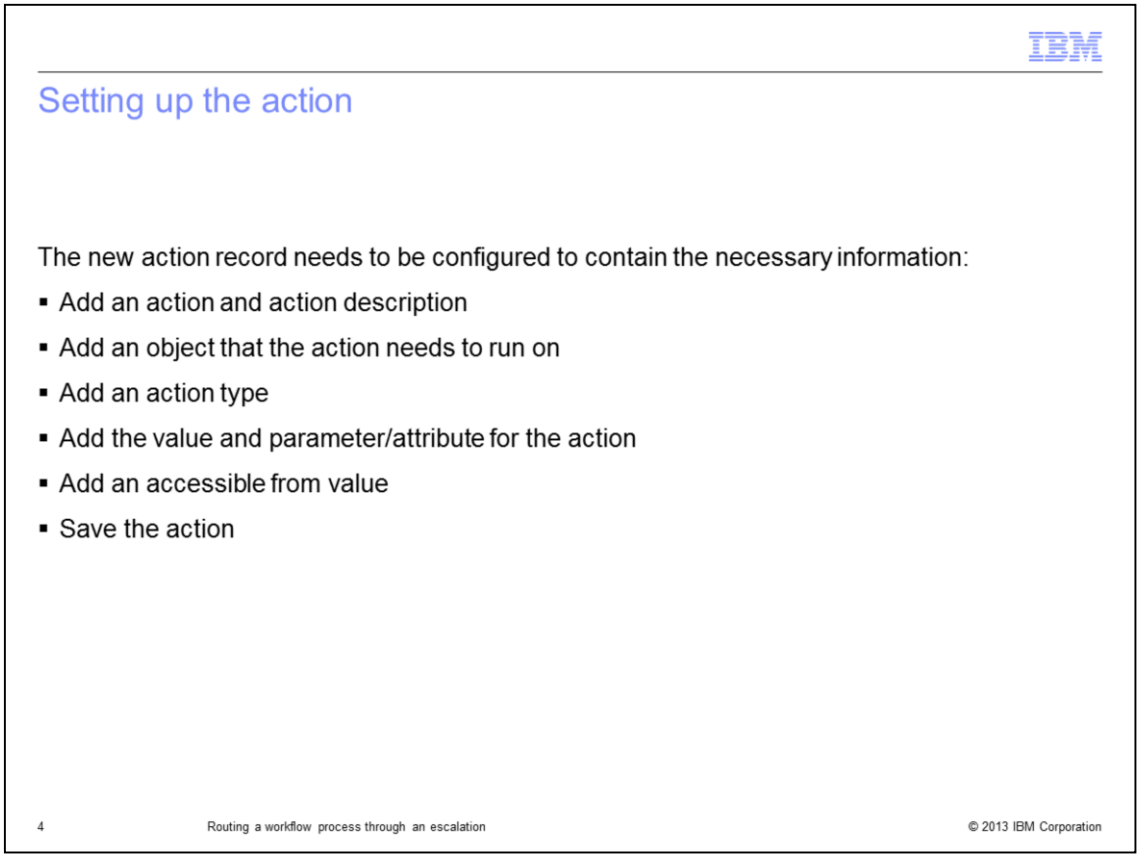
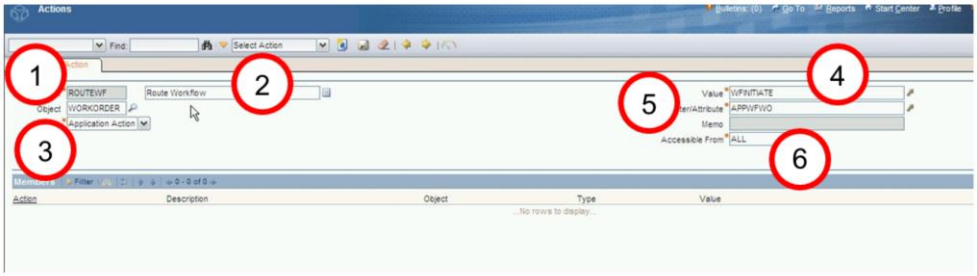
In order to add a new action record click **Go To** > **System Configuration** > **Platform Configuration** > **Actions**. Next, click **New Record**. Observe the creation of a new action record.



In this example you configure the information on the action record. The action requires a description and a name can be edited to be a better name. The Object field needs to be filled in with the name the table action applies to – in this case WORKORDER. This is an Application Action type and the value WFINITIATE needs to be chosen from the available list. The Parameter field needs to reflect the workflow process name. You can now save the configured action record.

Setting up the action

Setting up a new action record



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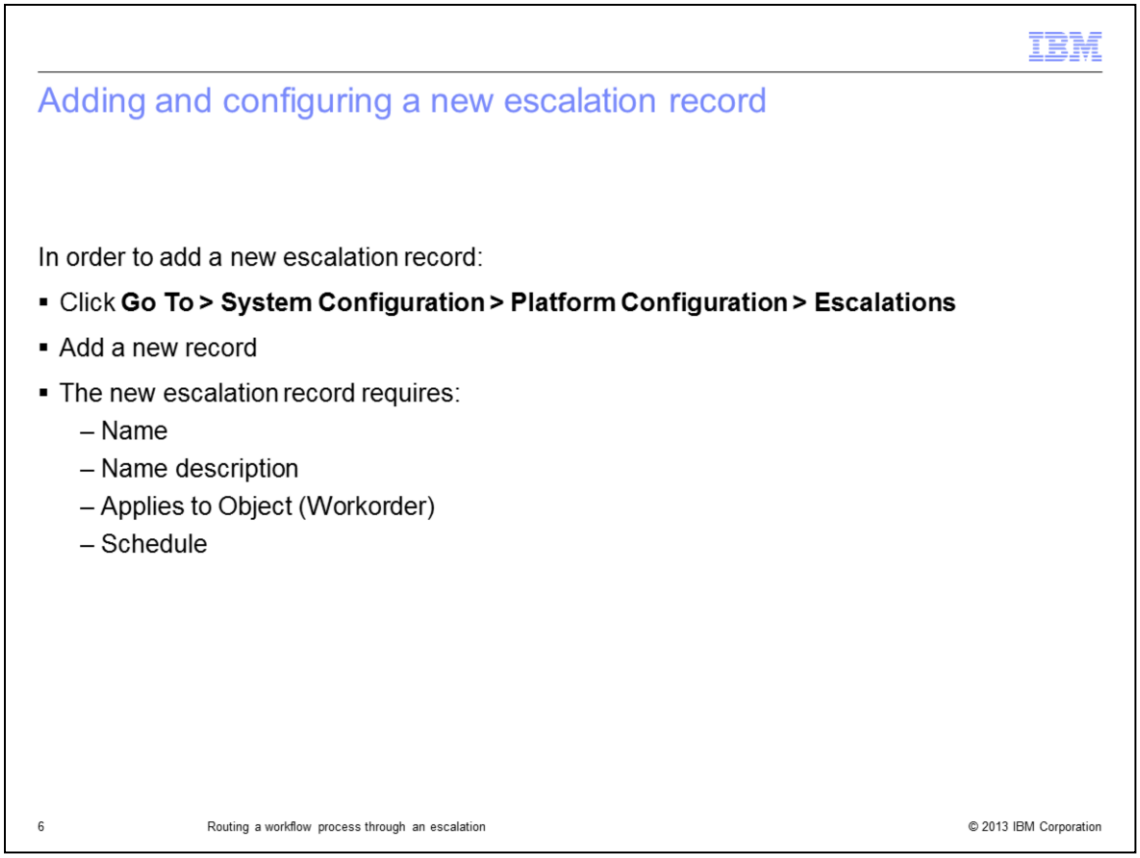
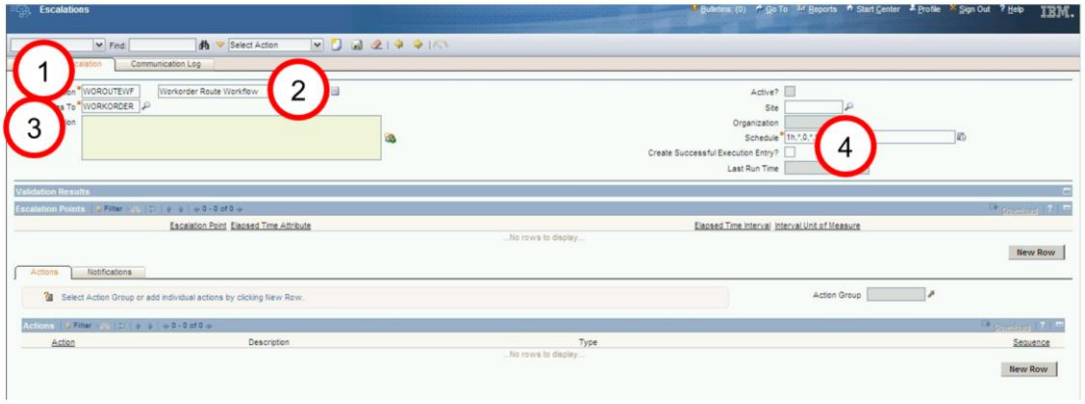
In this slide, you see an example of the fields used to configure a work order action record.



In order to add a new escalation record click **Go To** > **System Configuration** > **Platform Configuration** > **Escalations**. Next, add a new record. The new escalation record requires a name, description, and the object value it is being configured to check.

Adding and configuring a new escalation record

Configuration for a new escalation record



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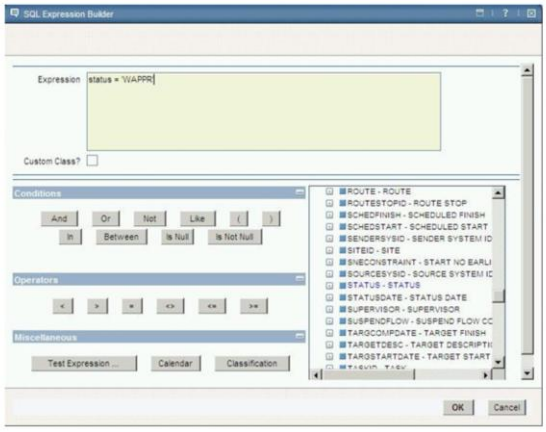
Here you see an example of the fields used when configuring a new work order escalation record. From the **Escalations** tab of the **Escalations** application, enter a name, description, condition, and schedule.

Configuring the escalation by adding a condition

- Open the SQL Expression Builder to configure the escalation condition
- Enter the expression <status = 'WAPPR'>
- Click **OK** to save the escalation condition



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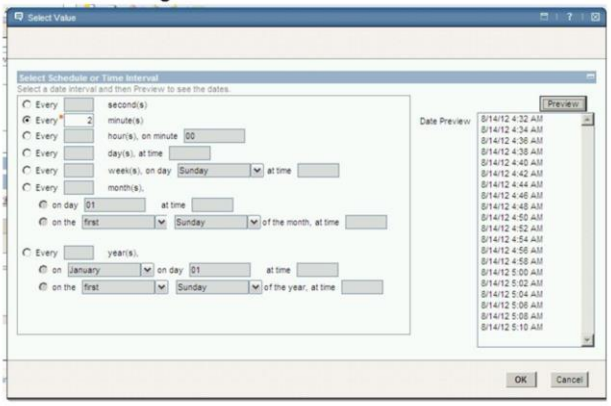
The next step in configuring the escalation is to add a condition. A condition is needed for the escalation to check against the chosen object. That object, in this case, is the WORKORDER table. You want to return records on the basis of an escalation condition. The expression can be built using the object attributes available on the right and the operators. In this case, the expression is status = 'WAPPR' is the escalation condition. Click **OK** to save and close the escalation condition.

Configuring the escalation schedule

Use the Set Schedule option and perform these tasks:

- Open and configure the schedule dialogue
- Set the schedule to the required value
- Click **OK** to save and close changes



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Use the **Set Schedule** option on the right to open and configure the schedule options for the escalation.

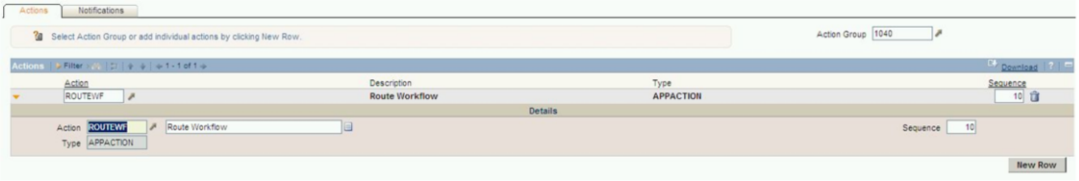
Set the schedule to the required value. In this case, two minutes is recommended for test purposes.

The **Preview** button can be used for more details on the escalation run schedule.

Click **OK** to save and close changes.

Adding an action to the escalation

- Press the **New Row** button to add a new action
- Select a value



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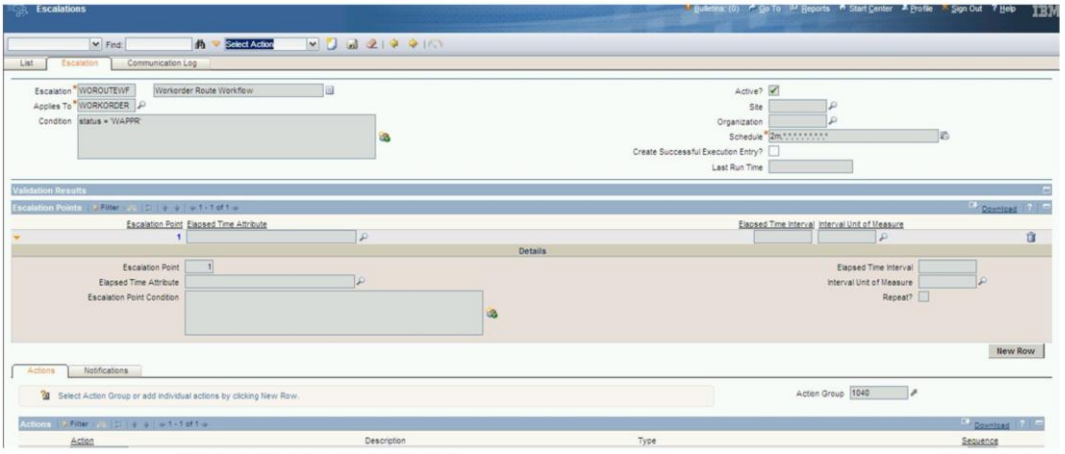
In order to add an action to the escalation, click **New Row** available on the bottom of the page to add a new action.

Select a value for the action. In this case, ROUTEWF is a previously added action.

Adding an escalation point

- Add a new row under Escalation Points
- Save the escalation record
- Use the Select Action menu to activate the escalation



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In order to run, the escalation needs an escalation point added.

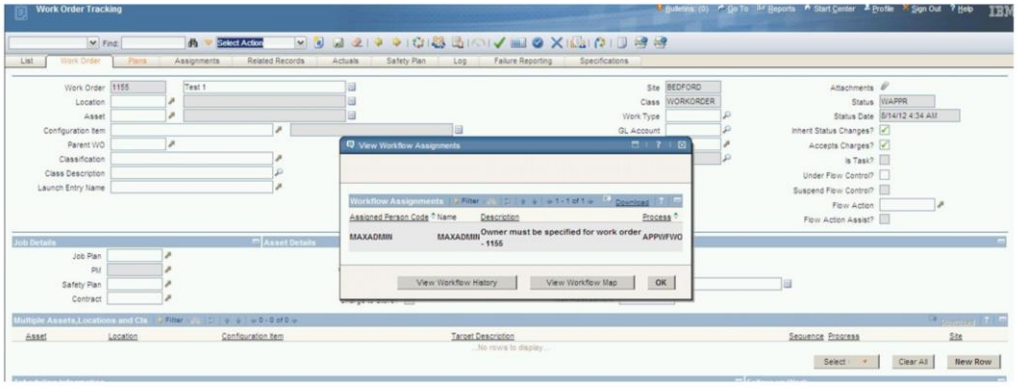
Add a new row under **Escalation Points**.

Save the escalation record.

Use the **Select Action** menu to activate the escalation.

Checking the results

Check that the escalation runs successfully



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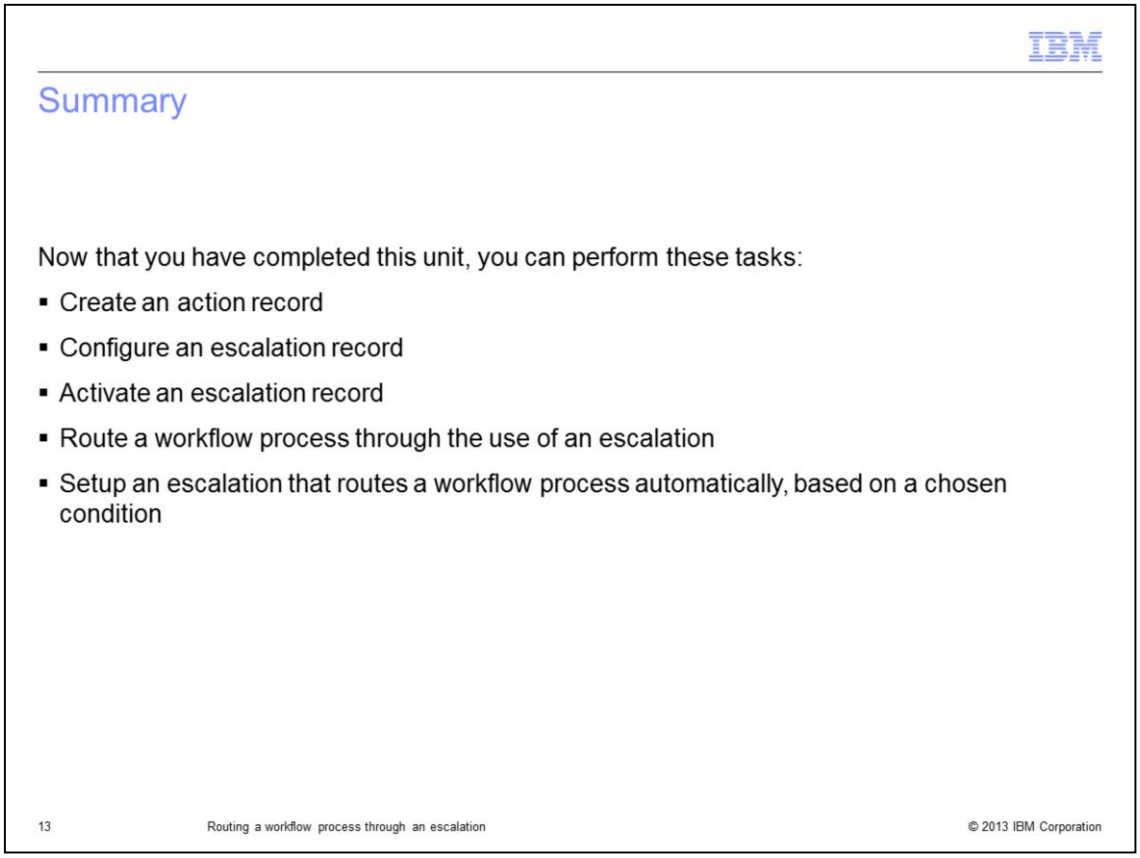
You can check that the escalation runs successfully by creating several new Work Order test records and saving them. The escalation checks for the ‘WAPPR’ status and routes these in workflow automatically. The action is a useful feature when you need to route records meeting a specific condition in a workflow process unavailable to all users.



Now that you have completed this unit, you can perform these tasks:

- Create action record
- Create an escalation record
- Configure an escalation record
- Activate an escalation record
- Route a workflow process through the use of an escalation

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