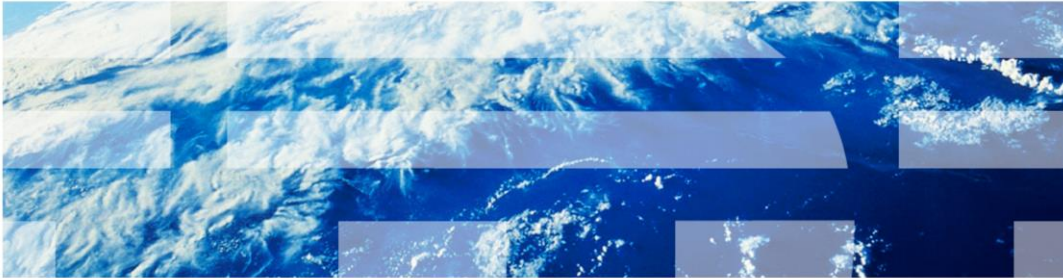


IBM Maximo Asset Management V7.1

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.

Objectives

When you complete this training module you are be able to accomplish these tasks:

- Create an action record
- Configure an escalation record
- Activate an escalation record
- Route a workflow process through the use of an escalation
- Setup an escalation that routes a workflow process automatically, based on a chosen condition

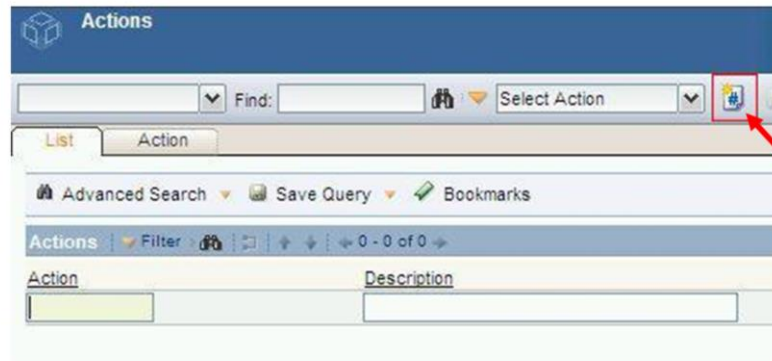
After completing this module, you can perform these tasks:

- 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.

Setting up the action

The new action record needs to be configured to contain the necessary information:

- Add an action and action description
- Add an object that the action needs to run on
- Add an action type
- Add the value and parameter/attribute for the action
- Add an accessible from value
- Save the action

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 WFINITATE 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

The screenshot shows the 'Actions' configuration window. The form contains the following fields:

- 1**: Action Name (ROUTEWF)
- 2**: Object (WORKORDER)
- 3**: Application Action (Application Action)
- 4**: Value (VIFINITATE)
- 5**: Attribute (APPIVIVO)
- 6**: Accessible From (ALL)

Below the form is a table with the following columns: Action, Description, Object, Type, Value. The table currently displays the message: "...No rows to display...".

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

Adding and configuring a new escalation record

In order to add a new escalation record:

- Click **Go To > System Configuration > Platform Configuration > Escalations**
- Add a new record
- The new escalation record requires:
 - Name
 - Name description
 - Applies to Object (Workorder)
 - Schedule

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

The screenshot shows the 'Escalations' application interface. The main form is titled 'Escalation' and includes the following fields and controls:

- Name:** A text input field containing 'WOROUTENF', circled with a red '1'.
- Description:** A text input field containing 'Workorder Route Workflow...', circled with a red '2'.
- Condition:** A text input field containing 'To: WORKORDER', circled with a red '3'.
- Schedule:** A text input field containing '1h:0:0', circled with a red '4'.
- Active?:** A checkbox.
- Create Successful Execution Entry?:** A checkbox.
- Last Run Time:** A text input field.

Below the main form, there are several sections:

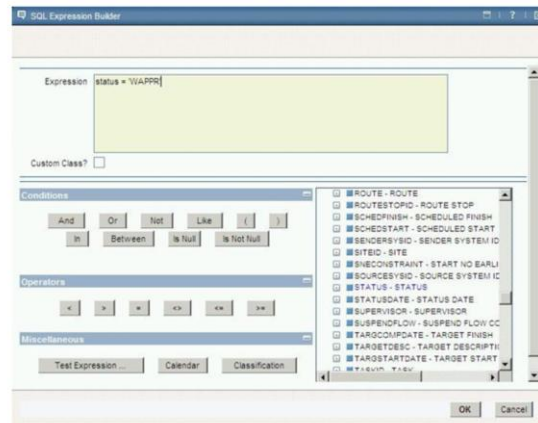
- Validation Results:** A section with a filter and a 'New Row' button.
- Escalation Points:** A table with columns 'Escalation Point', 'Elapsed Time Attribute', and 'Elapsed Time Interval Interval Unit of Measure'. It shows 'No rows to display...' and a 'New Row' button.
- Actions:** A section with a filter and a 'New Row' button.
- Notifications:** A section with a filter and a 'New Row' button.

The page number '7' is located at the bottom left, and the copyright notice '© 2013 IBM Corporation' is at the bottom right.

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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Routing a workflow process through an escalation

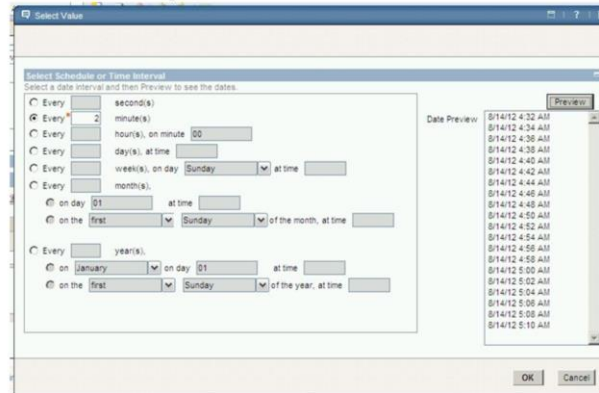
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The next step in configuring the escalation is to add a condition. A condition is needed for the escalation to check against the chosen object. That object, in this case, is the WORKORDER table. You want to return records on the basis of an escalation 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

The screenshot shows a web interface for managing actions. At the top, there are tabs for 'Actions' and 'Notifications'. Below the tabs is a search bar with the text 'Select Action Group or add individual actions by clicking New Row.' and a dropdown menu for 'Action Group' with the value '1040'. Below this is a table with columns 'Action', 'Description', 'Type', and 'Sequence'. The table contains one row with the following data: Action: ROUTEWF, Description: Route Workflow, Type: APPACTION, Sequence: 10. Below the table is a 'New Row' button. The 'Action' field in the table is highlighted with a blue border, and a dropdown menu is open showing 'ROUTEWF' as the selected value. The 'Type' field is also highlighted with a blue border and shows 'APPACTION'.

Action	Description	Type	Sequence
ROUTEWF	Route Workflow	APPACTION	10

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

Escalation: WOROUTEWF Workorder Route Workflow

Applies To: WORORDER

Condition: status = 'WAPPR'

Active?

Site: [Field]

Organization: [Field]

Schedule: [Field]

Create Successful Execution Entry?

Last Run Time: [Field]

Validation Results

Escalation Points

Escalation Point	Elapsed Time Attribute	Elapsed Time Interval	Interval Unit of Measure
1			

Escalation Point: 1

Elapsed Time Attribute: [Field]

Elapsed Time Interval: [Field]

Interval Unit of Measure: [Field]

Repeat?

Actions

Select Action Group or add individual actions by clicking New Row.

Action Group: 1040

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

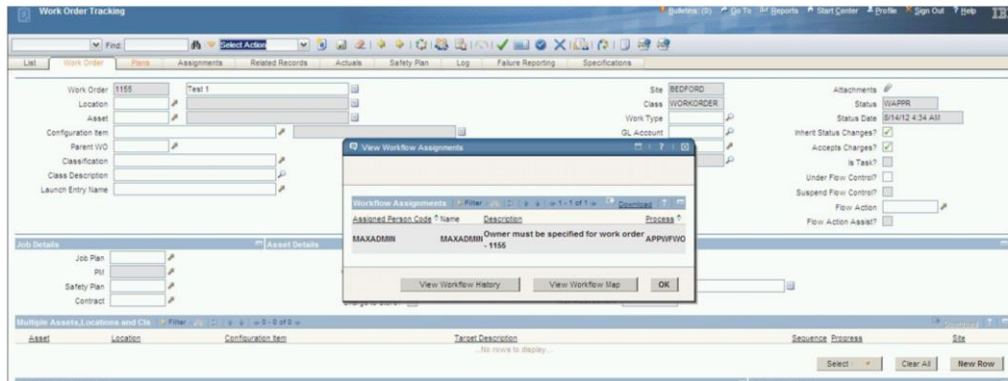
Add a new row under **Escalation Points**.

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.

Summary

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

- Create an action record
- Configure an escalation record
- Activate an escalation record
- Route a workflow process through the use of an escalation
- Setup an escalation that routes a workflow process automatically, based on a chosen condition

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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