User Experience Improvements
for Maximo 7

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Why focus on the user experience?

- **Feedback from customers regarding Maximo performance and usability**

- **Site visits with customers that helped pinpoint some key areas for improvement**

Goal: Get work done more quickly and efficiently

Agenda

- **Maximo 7.5 efficiency enhancements:**

  - Table window refresh behavior

  - Asynchronous validation

  - New calendar control

  - Rich-text editor

  - Screen zooming with browser controls

  - Easier ID of controls with conditional security

Agenda, continued

- **Improvements with 7.1:**
  - Result sets link to apps
  - Time-out behavior
  - List page behavior
  - Images on records
  - Ad-hoc reporting
- **Fixpack additions to smooth rough edges:**
  - Run in background mode
  - Specific status buttons
  - Access to Advanced Search
  - Advanced Search improvements
  - QBE cancel capability

The Latest: Version 7.5

When I save, focus remains on the last table row that I edited.

When I save a record and go back to the List, the result set is still in the state I left it until I hit refresh.

Records that have been touched are italicized to indicate they have changed.

Table Window Configuration

- **The new functionality is on by default, but can be turned off at the system level to make it function as it did in pre-7.5 releases**

  – `mxe.webclient.listtable.retainstate`

    - Defaults to `1`, use new functionality
    - Set to `0` to revert to pre-7.5 functionality
      – Will also remove the table refresh button

  – `mxe.retainrecord`

    - Defaults to `1`, use new functionality
    - Set to `0` to revert to pre-7.5 functionality

  – `mxe.retainrecordlimit`

    - Defaults to `200`
    - Maximum number of records for which the table will retain state
    - Higher numbers can affect performance

I can enter data at my own pace, and address errors and warnings when I want to.

Configuring Asynchronous Validation

- **System level**
  - System property `mxe.webclient.async`
    - `1` – enable - default
    - `0` – disable
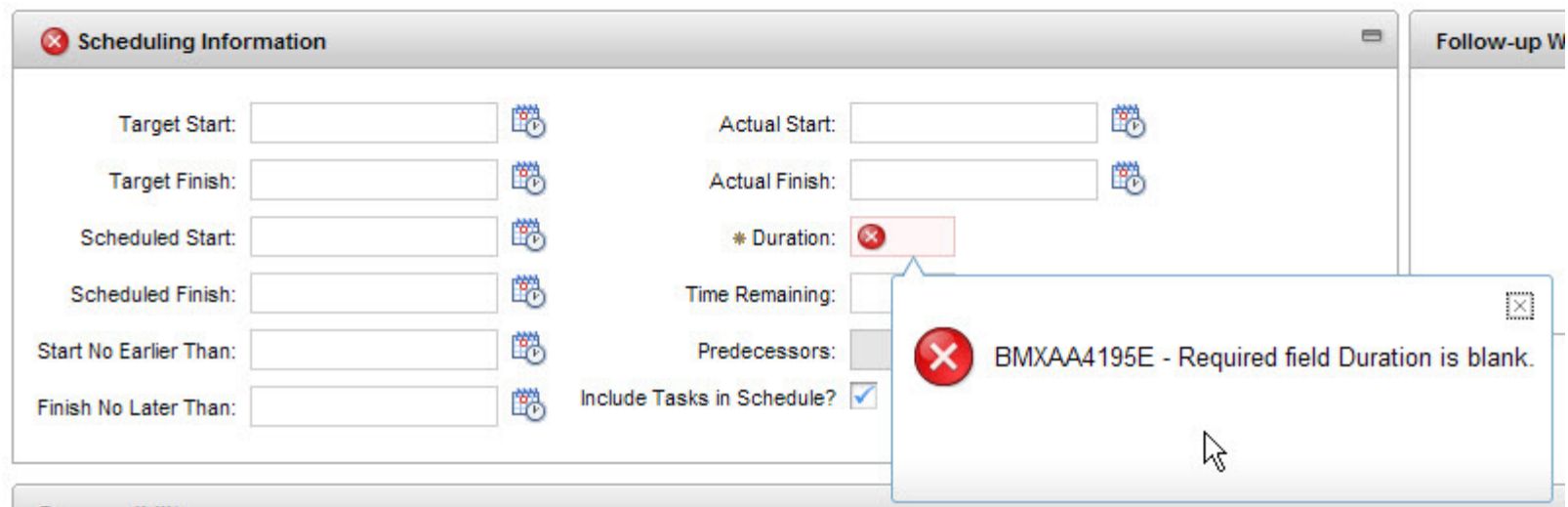
- **Application level**
  - Checks system level and:
    - Set `synchronous=`"`true`" on the `presentation` control in the presentation xml.

- **Field Level**
  - Checks Application Level and:
    - Set `synchronous=`"`true`" on an individual control in the presentation xml.

If I try to save without filling in required fields, those fields are called out to me, and their containers are marked so that I can see the path to fields I must fill in.

Required Field Identification on Save

- **Dialog lists all missing values**
    - Note that labels now match the field label even if a custom label was specified in the presentation

- **Tab with error that is not current tab**
    - "Status Date" is on the Work Order tab
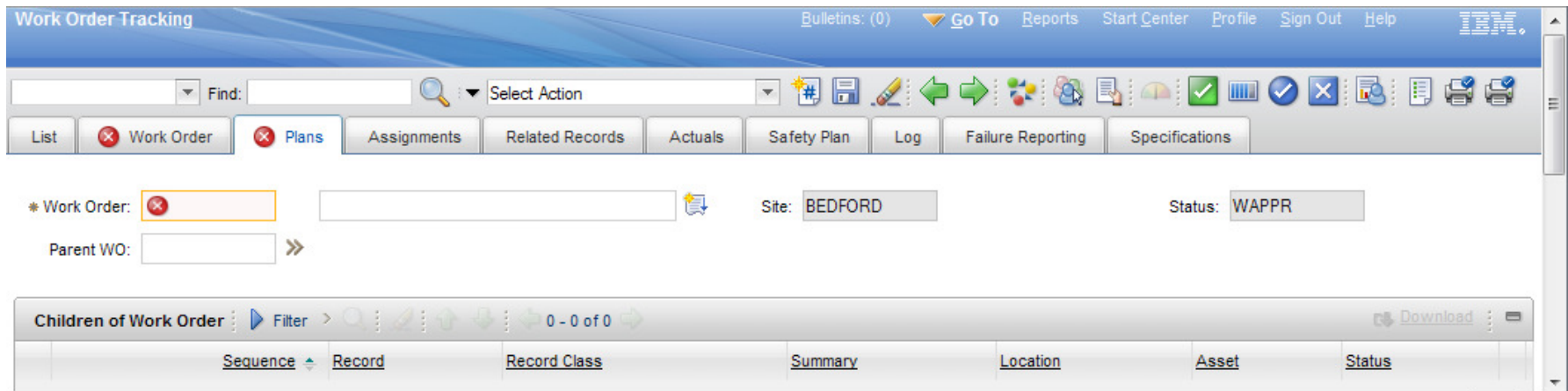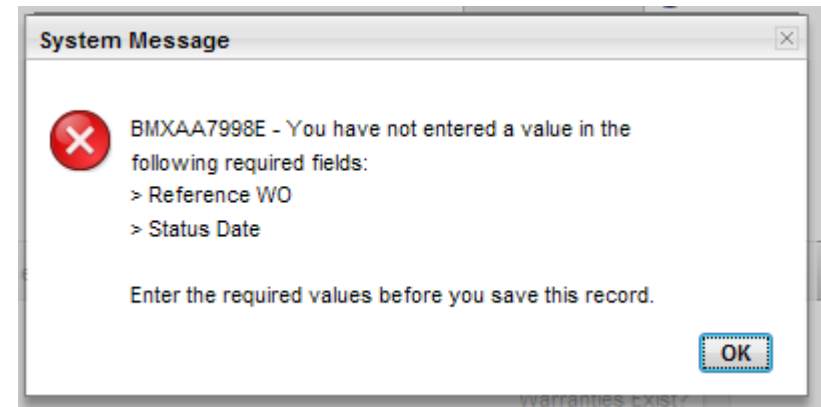
Configuring Required Field Checking

- **Controlled by the `mxe.webclient.deepRequiredCheck` system property.**

  - Valid values

    - `1` – enabled – default
    - `0` – disabled

Date and Time Fields

When I choose a date or time, the delay between my click and the UI response onscreen is minimized. The server round-trip is eliminated. This is also true for the keyboard shortcuts to move forward and backward, or to insert the current date.

Rich-Text Editing

Long Description

Now you can enter long description information using rich text:

- You can use bullets or numbered lists
- You can make text **bold** or *italicized*

You can even include hyperlinks to other web sites.

You have control over the color and font you use, as well as text alignment.

Reset   Clear

OK   Cancel
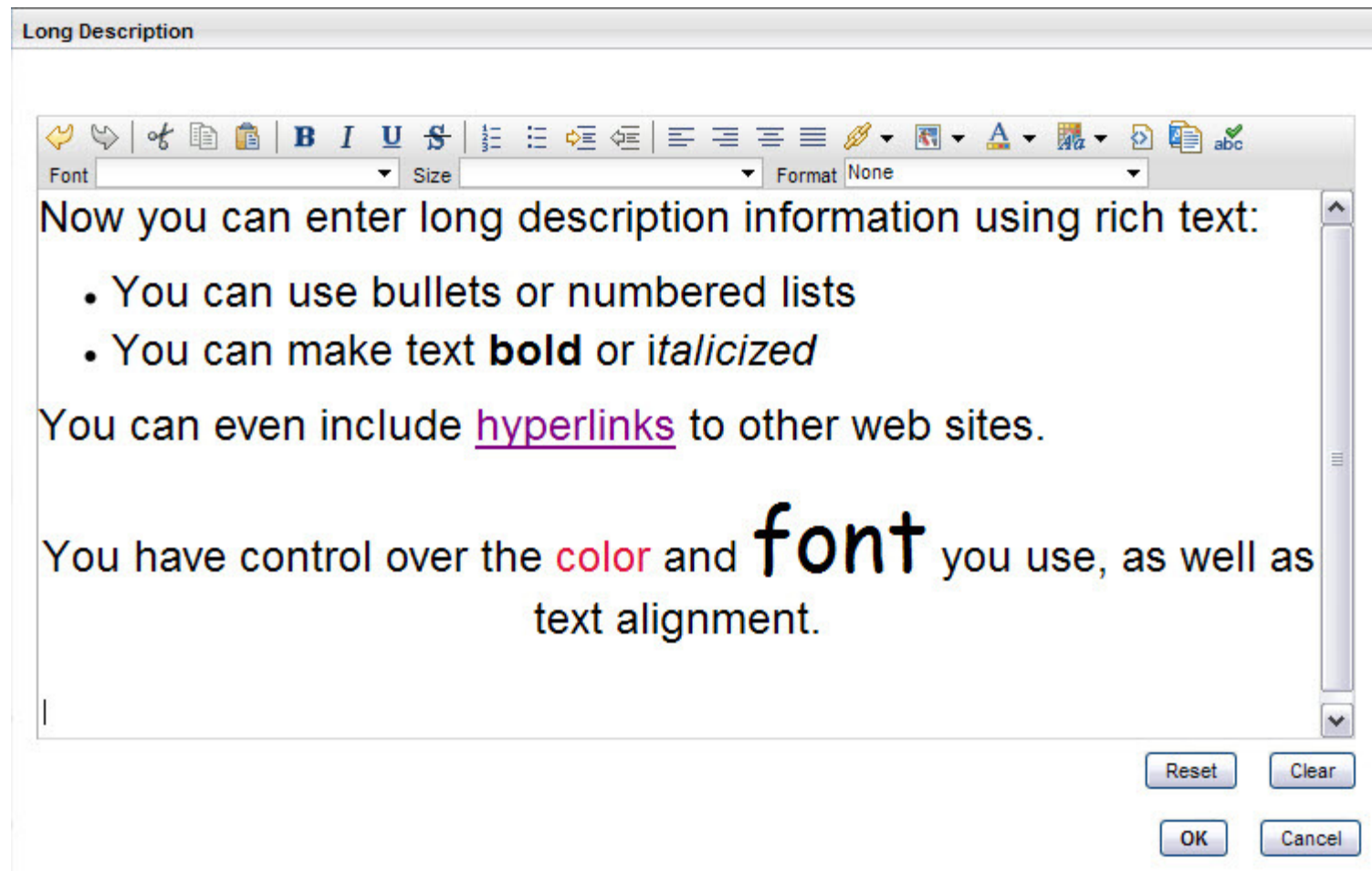
I can enter text in the format that I want on a Maximo screen. I don't need to rely on attachments for rich-text formatting.

Long Description Dialogs or Embedded Rich Text

More on the Rich-Text Editor

- **Out of the box it is enabled for Long Descriptions and Communication templates**

- **Markup language is HTML**

- **Control is built using the Dojo Editor**
  - http://dojotoolkit.org/reference-guide/dijit/Editor.html

- **Server removes all scripting and embedded objects (Java Applets, Adobe Flash, etc) before sending the value to the browser.**

- **Works with reporting**

- **Integration Frameworks handles rich text in and out too**
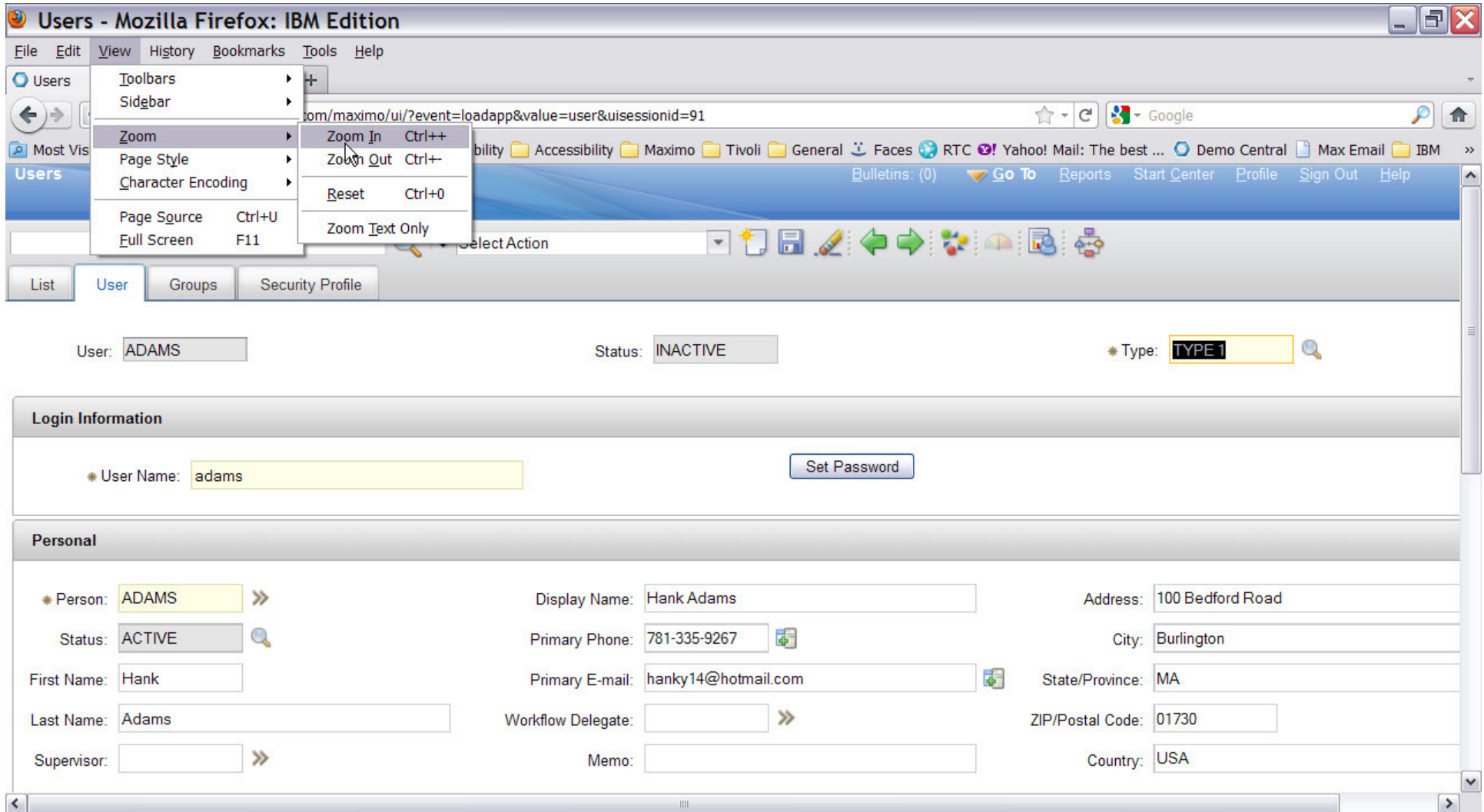
Rich Text – Application Design
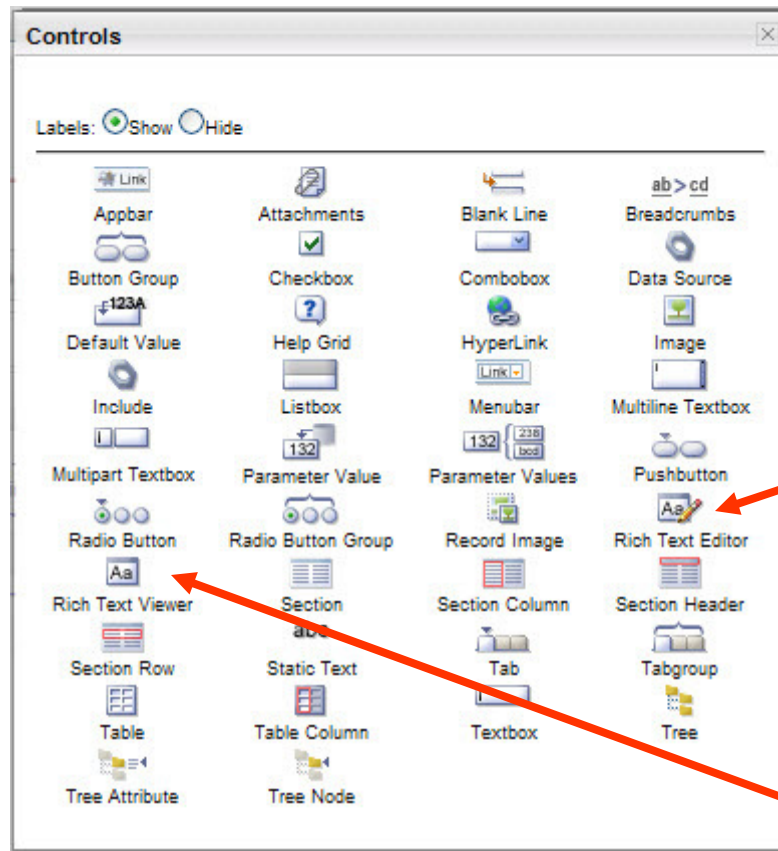
The Rich Text Editor offers the full toolbar of editing capabilities

The Rich Text Viewer is a read-only version of the Editor, and omits the toolbar.

I can use Maximo without magnifying glasses!

App Designer:
Indicating Controls with Conditional Security

- **To see which controls are using conditional security:**

  – Select Action > Toggle Show Conditional UI Controls
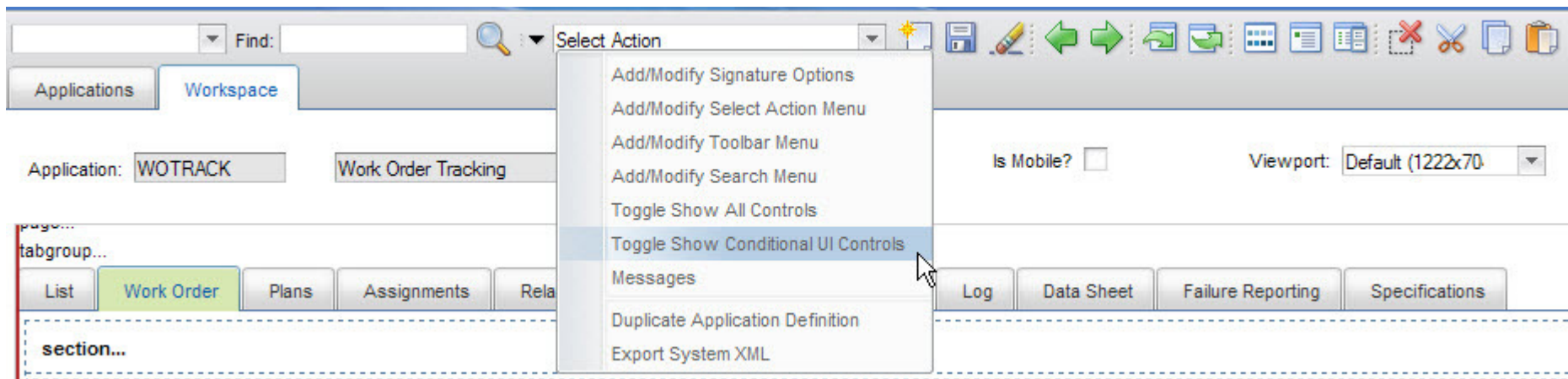
App Designer:
Onscreen Indicator for Conditional UI

- **Note indicator next to UI controls**

- **Indicator may appear on containers (tabs, sections) if those are controlled by conditional UI. The container is not marked if it simply contains controls that have conditional security attached.**

Going Back to 7.1…

New Link between Result Sets and Apps

I want to see a full result set from the Start Center in the app it applies to so that I can drill down into details on that set

New Timeout Behavior

- **Why is the system not telling me what it already knows?**

- **Pre-6.2, you had to click on something to learn you had already timed out**

- **In 6.2, as soon as you time out, you're taken back to the login screen and shown a message explaining you've timed out**

- **The screen reflects the current state of the application**

- **Number of minutes before timing out set via webclient.properties file**

Time-out Improvement

7.1.1.3

- **Give me advance warning of a time out so that I can intervene without losing work.**

- **New warning message -- configurable in webclient.properties file to appear X minutes before time-out occurs**

> **System Message**
>
> As a security precaution, system sessions expire after N minutes of inactivity. Your session will time out in __ seconds. Click OK to continue your current session.
>
> OK
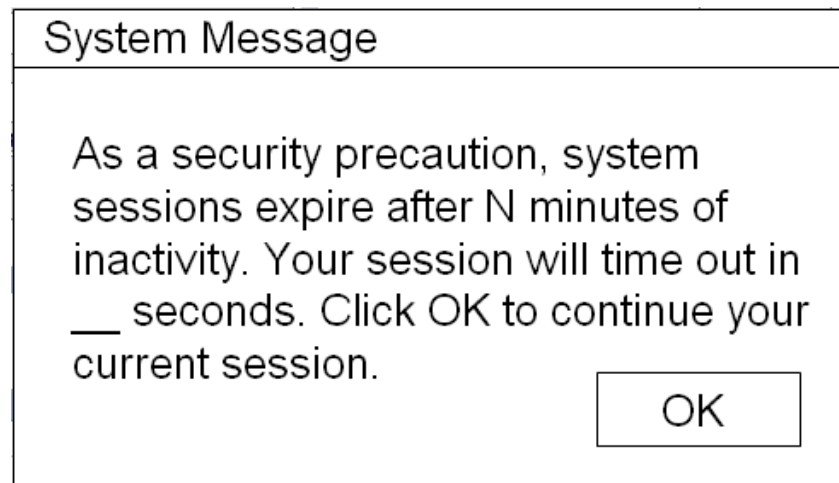
Warning on the List Page

I've just performed a query and gotten my result set of Work Orders – there are a few hundred. Because the first record in the set is the one I'm interested in, I don't even need to go to the Main tab. I'll just change status right here on the List page.

- **Common misconception because of row highlighting**

- **Changing status (or performing any action from the toolbar or Select Action menu) affects all the records in the result set**

  – All of them, not just the ones on the first page

- **Recovering from the error is extremely difficult and time consuming**

- **In Maximo 7.1, a warning alerts users to the potential danger, and lets them continue with the action if they want to**

Row 1 Is Highlighted, but Not Selected

New Warning on List Page

Warning Appears Out of the Box

- **For most actions that can affect an entire result set**

- **On the List page only**

- **Only when NOT in select records mode**

- **Only when there is more than one record in the result set**

But:

- **It can be disabled in places where it has been enabled out of the box**

- **It can be enabled for other actions**

Working with the Flag

- **For the desired application, go to App Designer and choose Add/Modify Signature Options from the Select Action menu:**

The Flag Is Set

Bulk Action Improvement

7.1.1.3

New ability in to configure bulk action warning on List page so that it appears only if more than X records appear in result set

System Message

BMXAA2185E - This action affects all 491 records in this result set.

If you would like to select one or more records to apply this action to, click Cancel, then:
- select the desired records using check boxes on the List page
- select the action you would like to perform on them.

If you want to proceed with the action on the entire result set, click OK.

OK   Cancel

System Properties View

Thumbnail Image on Records

I can't remember which of the three types of X I'm supposed to reorder, but I'd recognize it if I saw it.

- **Sometimes, a picture provides more information than a textual description**

- **It takes many clicks to open an attachment; thumbnail images are always visible on record without clicking**

- **The same image can be placed on each tab, but there is only one image per record**

New Control for Item Master

Putting an Image on a Record
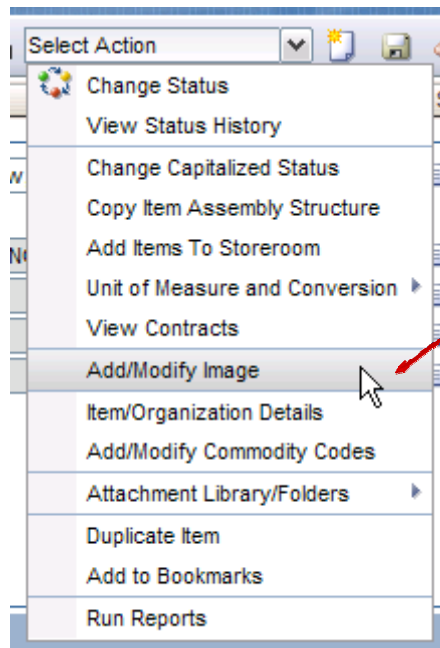
Choose Add/Modify Image from Select Action menu

Find the jpg or gif image on the system
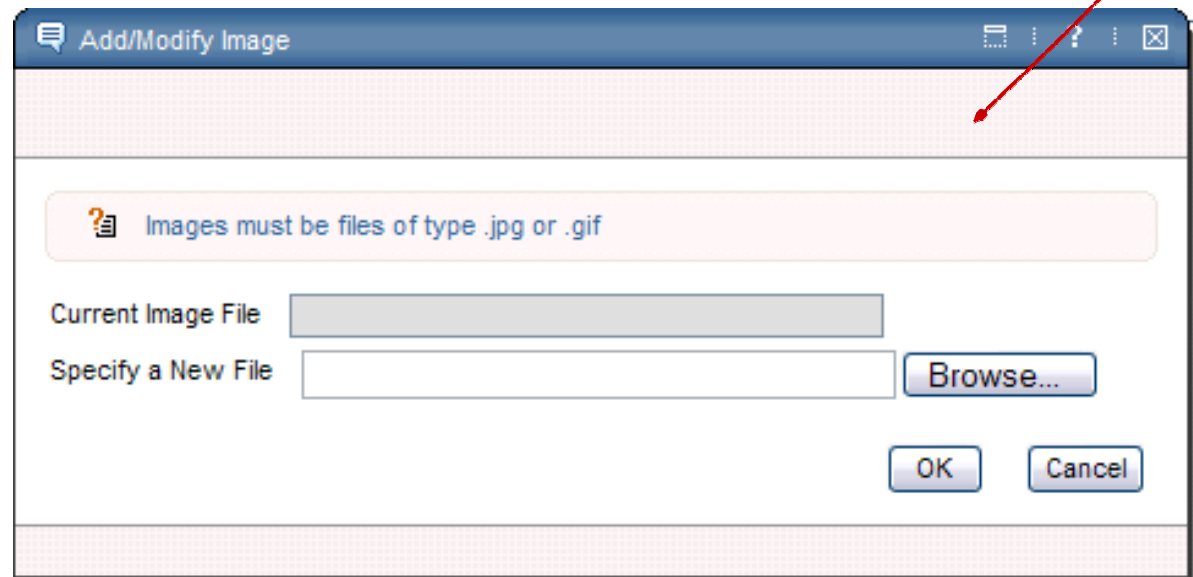
Image Can Be Removed via Same Process

Clicking image opens a new Maximo dialog with the image shown in its original size

Add the Image Control to Other Records
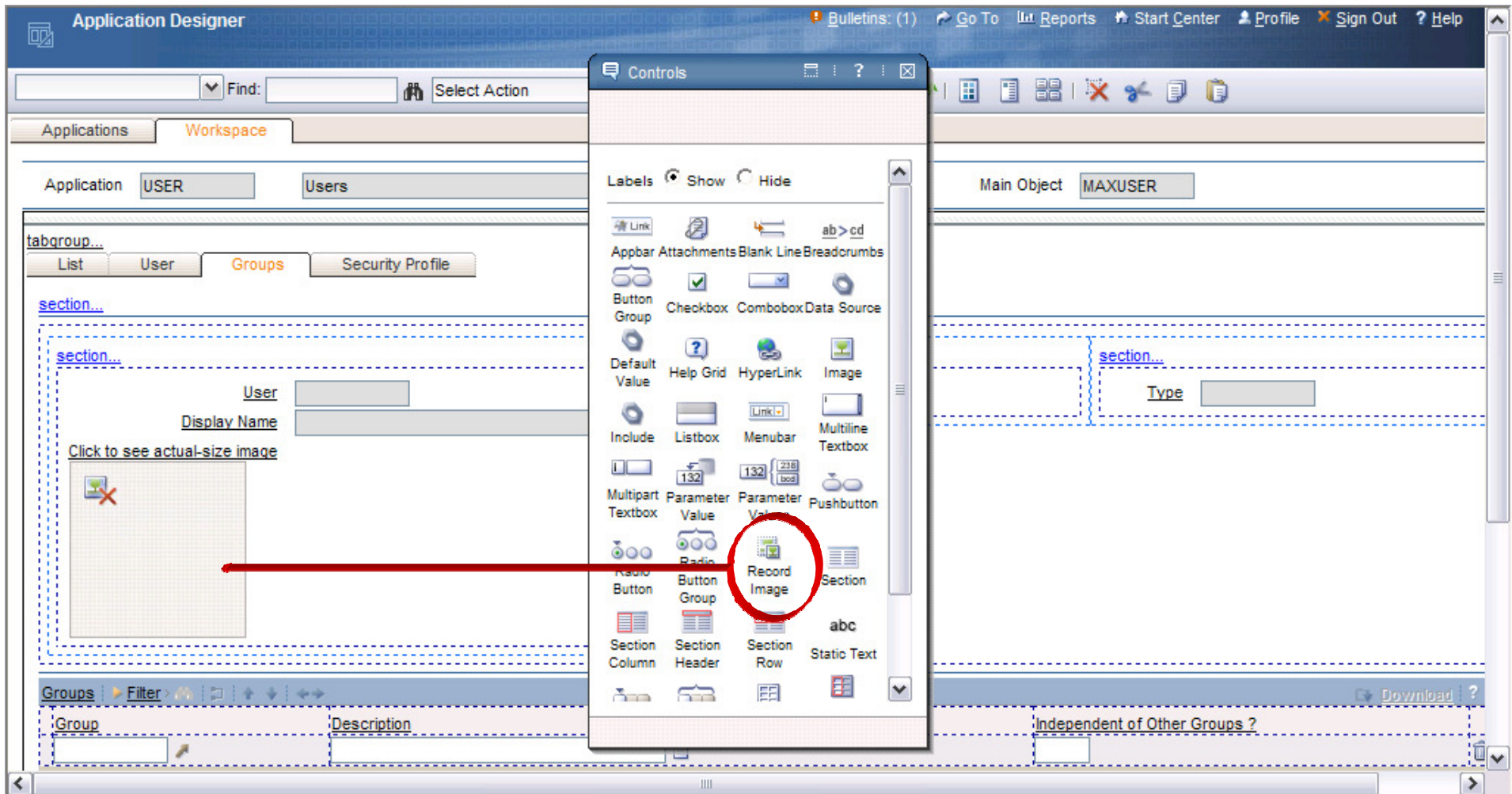
I'm adding the image control to the Users App, so I can insert a picture of each employee

Adding a Picture to a Record

- **In App Designer**

  - Add image control

  - Add 2 sigoptions: ITEMIMAGE and SHOWDELETE

  - Add ITEMIMAGE option to Select Action Menu

- **In Security Groups**

  - Grant access to ITEMIMAGE and SHOWDELETE for groups that are allowed to add or delete specific images

- **In Database Configuration**

  - Create the relationship between the app's object and IMGLIB

Result: People's Pictures in the User App
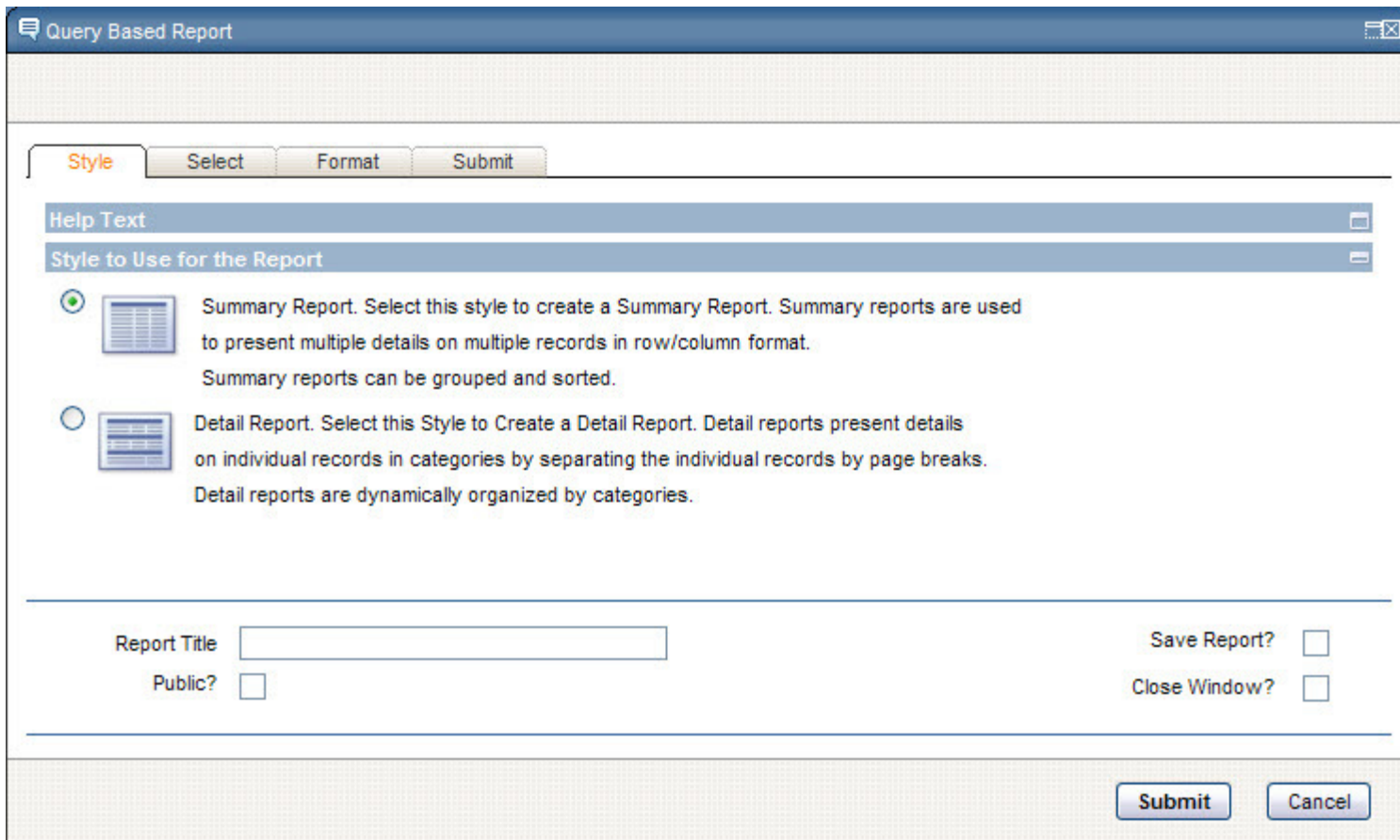
Ad-Hoc Reporting

I don't need a fully designed report, I just need to get some information

Ad-Hoc Reporting, cont'd.

Ad-Hoc Reporting, cont'd.

Fixpack Additions for Improving Efficiency

- **Run-in-background mode**

- **Change status with fewer clicks**

- **Easier access to advanced search**

- **Better advanced search dialog**

- **Ability to cancel out of a QBE**

Run-in-Background Mode

6.2.3 **7.1.1.3**

- **This approval is taking forever!**

- **Ability to have work order status changes run in background so that they don't keep you from moving forward with work**

- **User specifies whether task should run in background**

- **Follows same model as:**

  - Generate Work Orders in Preventive Maintenance

  - Reorder Items in Inventory

Running in the Background: WO Change Status

**Check the box and enter email address for notification that task is complete
(Email is pre-filled, but you can change it)**

Changing Status in 7.1

One status button

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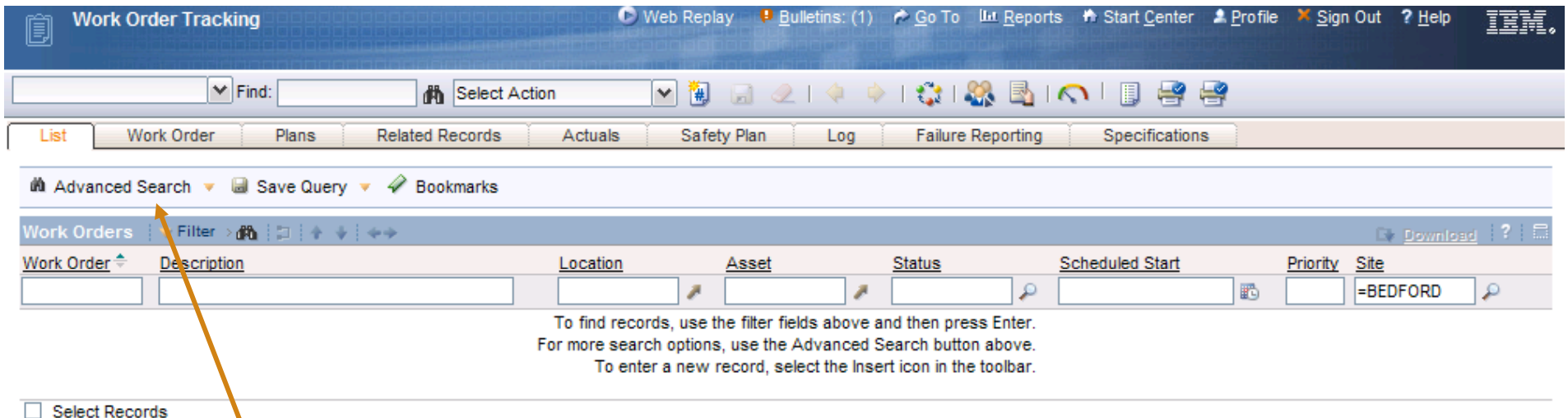# Change Status:
Buttons for Approve, Initiate, Complete, Close

7.1.1.3

Init button brings up dialog with In Progress already showing

Applications Affected

APPLICATION	DESCRIPTION OF IMPACT
Work Order Tracking	Approve, In progress, Complete, Close buttons for toolbar
Activities and Tasks	Approve, In progress, Complete, Close buttons for toolbar
Change	Approve, In progress, Complete, Close buttons for toolbar
Release	Approve, In progress, Complete, Close buttons for toolbar
Quick Reporting	Approve, In progress, Complete, Close buttons for toolbar
Purchase Reqs	Approve, Close buttons for toolbar
Purchase Orders	Approve, Close buttons for toolbar
RFQ	Sent, Close buttons for toolbar
Invoices	Approve, Paid buttons for toolbar
Service Requests	Queue, In progress, Pending, Resolve buttons for toolbar
Incident	Queue, In progress, Pending, Resolve buttons for toolbar
Problem	Queue, In progress, Pending, Resolve buttons for toolbar

Only these statuses have a button; there is no generic capability to add a button for any status

Accessing More Search in 7.1

The Advanced Search button/drop-down was the only way to access the More Search dialog, and it was available only on the List page

Search Access

7.1.1.3

Former List-page-only searching options now available through-out power apps via drop-down menu

Accessing More Search Specifically

- **List Page: Advanced Search Drop-Down**

- **Any Power App Page: Key Field Search Drop-Down**

- **Any Power App Page: Key Field Search Binoculars, when field is empty**

- **Any Power App Page:**

  – CTRL+ALT+F then Enter, when field is empty

  – Cursor in Key Field Search, then hit Enter, when field is empty

Note: Some single-page apps use a power-app header and get the same functionality described above (ex. Assignment Mgr)

The More Search Dialog

Changing queries requires closing the dialog

Clearer, Better Functionality in More Search

7.1.1.3

Formerly was the "Clear" button

The New "Revise" Button

- **Clear Query and Fields: Starts from scratch**

- **Clear All Fields: Retains current query**

- **Change Query: Brings up query-selection dialog**

- **Restore Default Query: Changes to user-designated query for that app (same as app's default query in some cases)**

Ability to Cancel a QBE

7.1.1.4

For Sys Admins:

Time out setting for system administrators stops a running query after a configurable amount of time: After X seconds, a message appears letting users know they need to refine their query

For End Users:

New "Stop Query" button to allow users to cancel a query without having to shut down the browser

Applies to filtering on List page, the More Search dialog, and the Where Clause dialog

System Properties

Hitting "Stop Query" closes dialog, returns to empty List page with query showing

User Experience Improvements Continue

- **Expect future efforts: site visits, usability tests, phone conversations**

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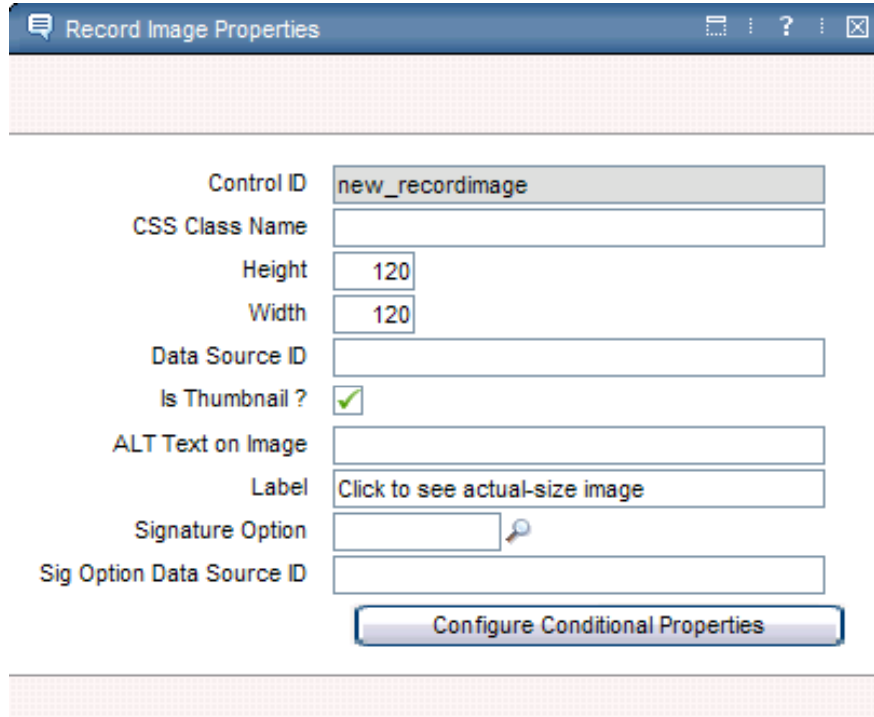
landesman@us.ibm.com

Backup
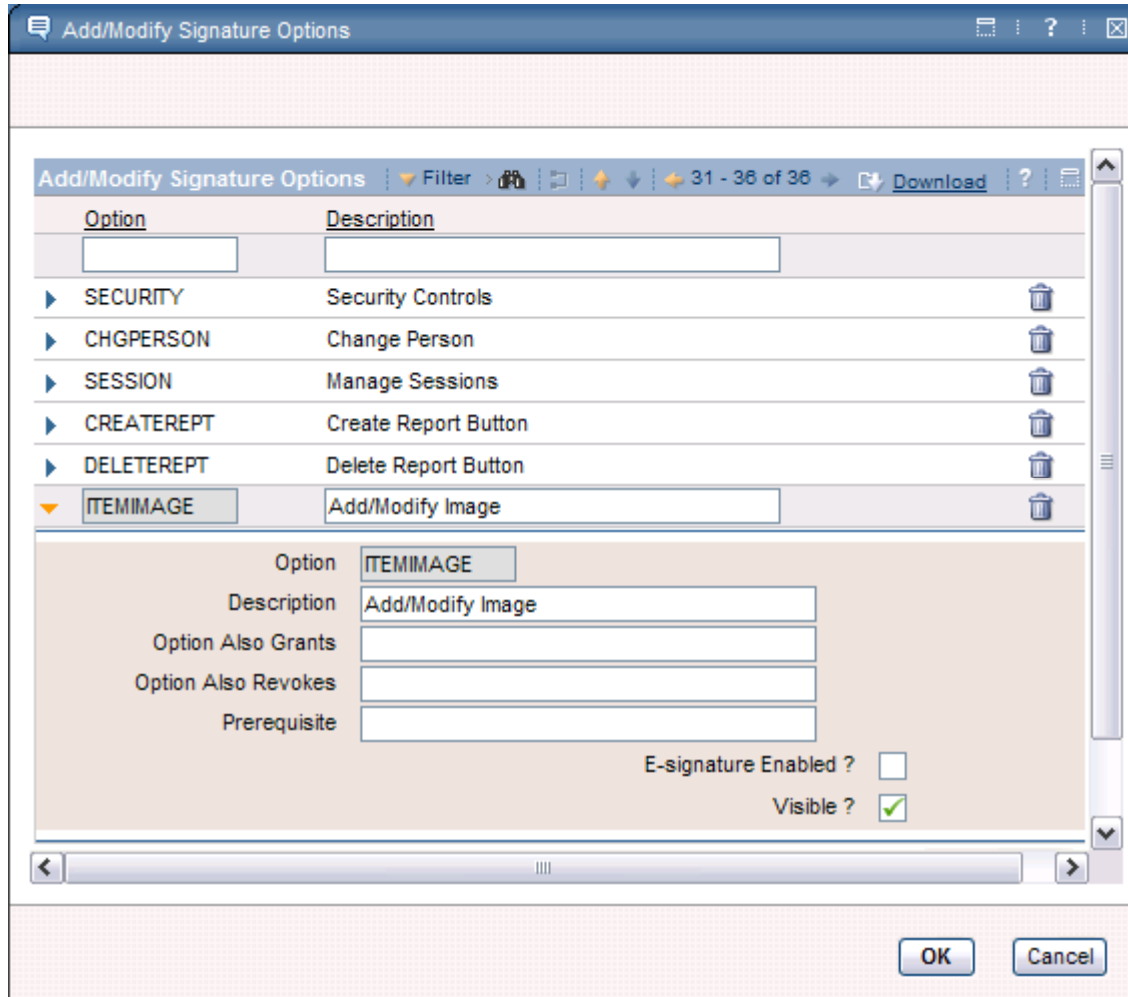
Image Properties

Image properties allow specification of size, label text, etc…

Adding to the Select Action Menu (1):
Create ITEMIMAGE Sigoption

The sigoption for the dialog is ITEMIMAGE

Adding to the Select Action Menu (2): Create SHOWDELETE Sigoption

SHOWDELETE creates the delete button in the dialog when an image has already been added

Adding to the Select Action Menu (3)

Grant Group Access to the ITEMIMAGE

Not everyone who sees the image should be allowed to add or delete the image

Grant Group Access to the SHOWDELETE Sigoption

SHOWDELETE should be granted to all the same groups as ITEMIMAGE

Create a Relationship

Record images live in the IMGLIB table. Create a relationship between the object and IMGLIB.