Maximo Educational Web Series
Maximo Ad hoc Reporting
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Presenting Today…

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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.

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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.

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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.
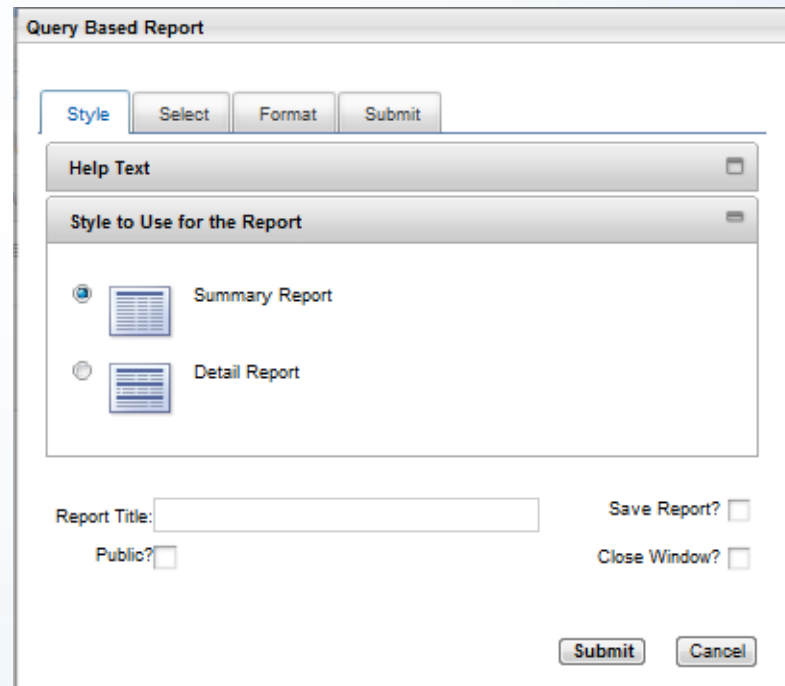
QBR Creation

- 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

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.

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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

Help Text

Parent Category: Asset Details

2

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

1

4

Available Fields   ▽ Filter   >   🔍   ⬇   1 - 6 of 78 ➡   Download

3

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

Add All

Selected Fields   ▷ Filter   >   ⬇   1 - 10 of 10   Download

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:			🔍 Single Value? ☑
And Also On Category:			🔍 Single Value? ☑
And Also On Category:			🔍 Single Value? ☑

Remove All

Grouping

	Category	Report Label	
Group First By Category:			🔍 Ascending? ☑
And Then By Category:			🔍 Ascending? ☑
And Then By Category:			🔍 Ascending? ☑

Remove All

Sorting

	Category	Report Label	
Sort First By Category:			🔍 Ascending? ☑
And Then By Category:			🔍 Ascending? ☑
And Then By Catgeory:			🔍 Ascending? ☑

Remove All

Submit   Cancel

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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.

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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: [_____]   Save Report? ☐

Public? ☐   Close Window? ☐

Submit   Cancel

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QBR Creation

5. Common fields to all four tabs

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

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.

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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 atleast 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 ahs access to the newly created ROS. This is done from Report Administration application.

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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.

Questions ?

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- Matt Logsdon – EVP
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Suggestions for Upcoming Webinar Topics
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Upcoming Webinars

- April 6, 2012 – Tririga Overview
- May 25th – Maximo/PowerPlant Integration

Upcoming Events

- FMMUG (Facilities Maintenance User Group)
  April 15-19th San Diego, FL

- GAMUG (Greater Atlanta Maximo Users Group)
  April 20th 8AM-noon Embassy Suites Kennesaw, GA

- MUWG (Maximo Utility Working Group)
  April 30th – May 3rd Atlanta, GA

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