

# IBM Maximo Asset Management V7.1

## Using E-Signature



This is a training module for Maximo® Asset Management V7.1. In this module, you learn to use the E-Signature user authentication feature.

## Objectives

When you complete this module, you can perform these tasks:

- Describe how to use the Maximo Asset Management version 7.1 electronic signature feature
- Select application and action attributes for e-signature enablement
- Enable e-signature password entry requirements for specific individual applications and actions prior to allowing configuration changes

When you complete this module, you can perform these tasks:

- Describe how to use the electronic signature feature
- Select attributes for e-signature enablement
- Set the e-signature enablement for specific applications and actions

## The benefit of using the E-Signature feature

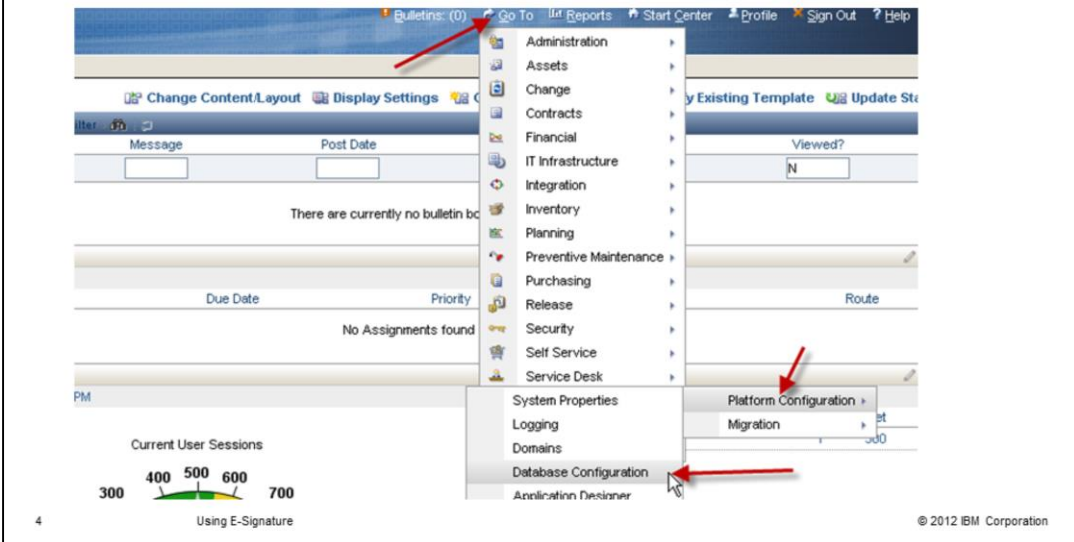
- The Maximo Asset Management version 7.1 E-Signature feature provides these benefits:
- Allows Maximo Asset Management administrators to request user password entry authentication prior to allowing and saving configuration changes on specific individual attributes
- Provides search filtering that can greatly assist in auditing the present e-signature enablement setting of applications and attributes
- Protects the approved configuration of specific applications and actions

Maximo Asset Management version 7.1 has a function called E-Signature. By using this feature, a system administrator can request password entry from users prior to the system allowing configuration changes to any individual application or action. Search filtering is included with the E-Signature feature. The search filtering makes it easier for administrators to audit the e-signature password protection enablement status of system applications and actions.

## Database configuration application

E-Signature is defined in the Database Configuration application

From the **Start Center**, click **Go To** > **System Configuration** > **Platform Configuration** > **Database Configuration**



E-Signature is set within the Database Configuration application. Navigate to the Database Configuration application. From the **Start Center**, click **Go To**. From the list provided, click **System Configuration**. Next, click **Platform Configuration** and then click the **Database Configuration** option.

## Listing and selecting objects for e-signature enablement (1 of 2)

- Set the search filter for a word saving in the attribute title
- Enter **ASSET** into the **Object** field and press Enter
- If the **Object** field does not show results, click **Filter**
- Click the **ASSET** object

The screenshot shows the 'Database Configuration' interface. At the top, there is a search bar with 'Find:' and a 'Select Action' dropdown. Below this are tabs for 'List', 'Object', 'Attributes', 'Indexes', and 'Relationships'. The 'List' tab is active, showing a table of objects. The table has columns for 'Status', 'Object', and 'Description'. The 'Object' column contains links to various objects, with 'ASSET' being the first and most prominent. A red arrow points to the 'Filter' button above the table, and another red arrow points to the 'ASSET' link in the table. The table content is as follows:

| Status | Object                           | Description                                    |
|--------|----------------------------------|--|
|        | <a href="#">ASSET</a>            |  |
|        | <a href="#">ASSET</a>            | <b>The ASSET Table</b>                         |
|        | <a href="#">ASSETANCESTOR</a>    | Asset Ancestor                                 |
|        | <a href="#">ASSETATTRIBUTE</a>   | Attribute or property of an Asset(Item,As,Loc) |
|        | <a href="#">ASSETFEASPECHIST</a> | Asset Feature Specifications History Table     |

At the bottom of the interface, there is a page number '5', the text 'Using E-Signature', and the copyright notice '© 2012 IBM Corporation'.

In this example, we enable the e-signature protection for an attribute named **VENDOR**. On completion, a password entry is required before accepting configuration updates to the attribute **VENDOR** within the table **ASSET**. On the Database Configuration screen, enter **ASSET** into the **Object** field. Next, press the Enter. Now view all objects that include the string **asset** in their title. If results are not initially shown, then click the **Filter** link. In this example, the object **ASSET** appears. Click the link **ASSET** in order to open the **ASSET** table.

## Listing and selecting objects for e-signature enablement (2 of 2)

- Click the **Attribute** tab
- Enter **VENDOR** into the search filter and press Enter
- If the search filter does not show, click **Filter**
- Click the small blue triangle to the left of **VENDOR** to expand the attribute
- Select the **E-Signature Enabled** check box

The screenshot shows the 'Database Configuration' interface for the 'ASSET' table. The 'Attribute' tab is active, and the 'VENDOR' attribute is selected and expanded. The 'E-Signature Enabled' checkbox is checked, indicating that e-signature enablement is required for this attribute.

| Status | Attribute | Description              | Type  | Length | Scale | Required                 |
|--------|-----------|--------------------------|-------|--------|-------|--------------------------|
|        | VENDOR    | Manufacturer-Vendor Code | UPPER | 12     | 0     | <input type="checkbox"/> |

**Details**

|             |                          |               |                               |
|-------------|--------------------------|---------------|-------------------------------|
| Attribute   | VENDOR                   | Title         | Vendor                        |
| Description | Manufacturer-Vendor Code | Class         | prod app asset FSIAssetVendor |
| Type        | UPPER                    | Domain        |                               |
| Length      | 12                       | Default Value |                               |
| Scale       | 0                        | Alias         | VENDOR                        |
| Required?   | <input type="checkbox"/> | Status        |                               |

**Advanced**

|                   |           |                 |                                     |                          |                                     |
|-------------------|-----------|-----------------|-------------------------------------|--------------------------|-------------------------------------|
| Entity            | ASSET     | Persistent?     | <input checked="" type="checkbox"/> | Audit Enabled?           | <input type="checkbox"/>            |
| Column            | VENDOR    | Must Be?        | <input type="checkbox"/>            | Multilanguage Supported? | <input type="checkbox"/>            |
| Same as Object    | COMPANIES | Positive?       | <input type="checkbox"/>            | Multilanguage in Use?    | <input type="checkbox"/>            |
| Same as Attribute | COMPANY   | User Defined?   | <input type="checkbox"/>            | E-signature Enabled?     | <input checked="" type="checkbox"/> |
| Autonumber        |           | Can Autonumber? | <input type="checkbox"/>            | Primary Column           | <input type="checkbox"/>            |

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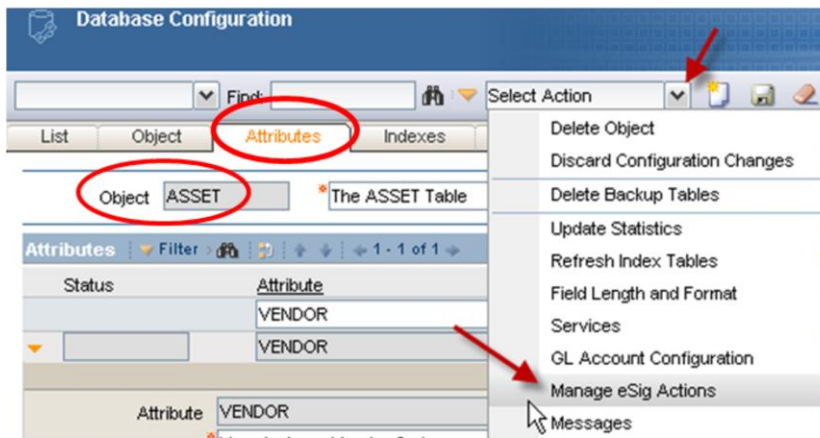
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The ASSET table is now open. Within the object record of the ASSET table, click the **Attribute** tab. Enter **VENDOR** into the **Attribute** search field and press Enter. This action shows the attribute called VENDOR. Expand the attribute named **VENDOR**. Audit the e-signature enablement status of the attribute VENDOR. Does this attribute currently require password entry prior to accepting changes to its current configuration? The answer in this example is no. To change that, select the **E-signature Enabled** check box for the attribute named VENDOR. The attribute VENDOR has now been set for e-signature enablement. Password entry is required before users can change the configuration of attribute VENDOR. This requirement protects the VENDOR attribute's current configuration.

## Managing eSig actions

Click **Select Actions** and select **Manage eSig Actions**



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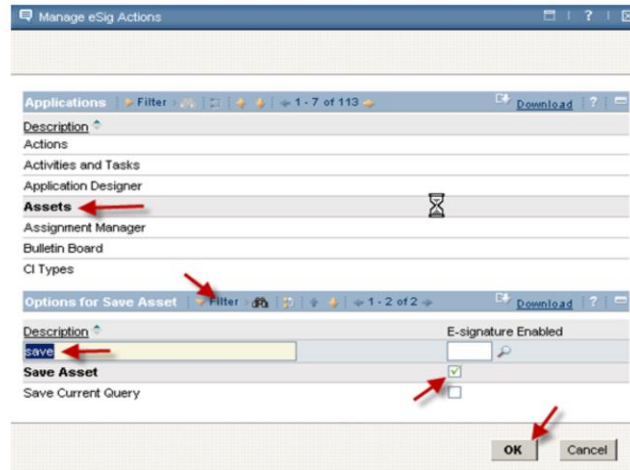
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Remain in the **Attributes** tab of the ASSET object. Click **Select Action** and select **Manage eSig Actions**.

## Checking and changing the current e-signature enablement status

- Select **Assets** in the **Applications** section
- Filter on **save** in the **Options for Save Asset** section and press Enter
- Select the **Save Asset e-signature enablement** check box and click **OK**



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On the Manage eSig Actions screen, click **Assets**. This action allows you to view the current asset's application e-signature enablement settings.

In the **Options for Save Asset** section, at the bottom of the screen, enter **save** into the **Description** search filter text box. This action is done to find all assets involving save actions.

If the search filter does not readily show any results with save in the title, then you can click **Filter**. **Save Asset** appears in this example.

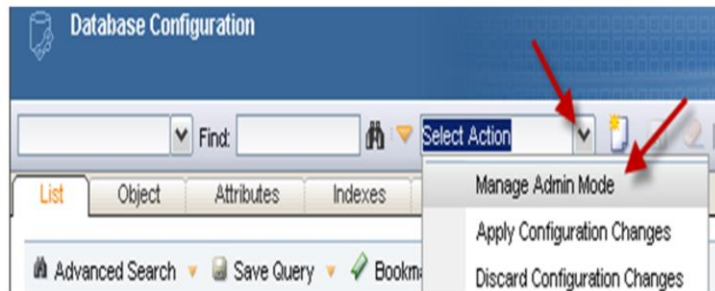
The current e-signature enablement setting for Save Asset is not set to require e-signature authorization. Select the **E-signature Enabled** check box for Save Asset and click **OK**.

Other applications and options can be chosen if required.



## Applying configuration changes: Admin Mode on (1 of 2)

- Click the **List** tab
- Click **Select Actions > Manage Admin Mode**



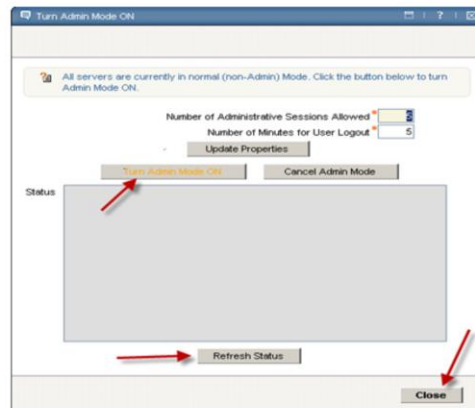
The saved changes now need to be applied for them to take effect.

On the Database Configuration screen, click the **List** tab.

From the **Select Actions** menu, click the **Manage Admin Mode** option.

## Applying configuration changes: Admin Mode on (2 of 2)

- Click **Turn Admin Mode ON**, some users cannot access Maximo when Admin Mode is on
- Click **Refresh Status** for updates
- Click **Close** when Admin Mode is reported to be on



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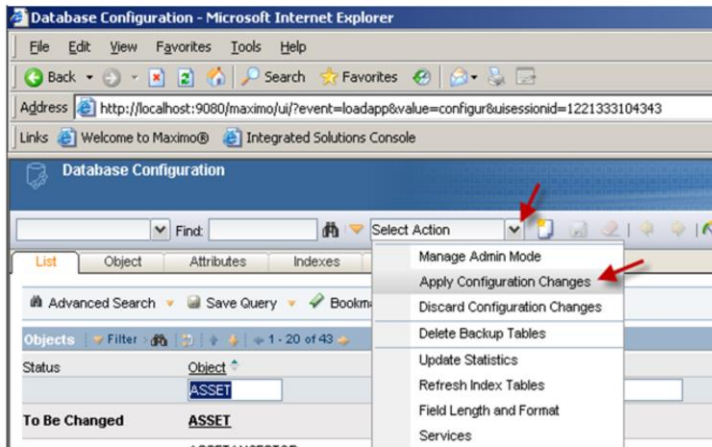
On the Turn Admin Mode ON screen, click **Turn Admin Mode ON**.

Click **Refresh Status** to receive updates on the progress of turning Admin Mode on.

When Admin Mode is on, click **Close**.

## Applying configuration changes (1 of 2)

From **Select Actions**, click **Apply Configuration Changes**



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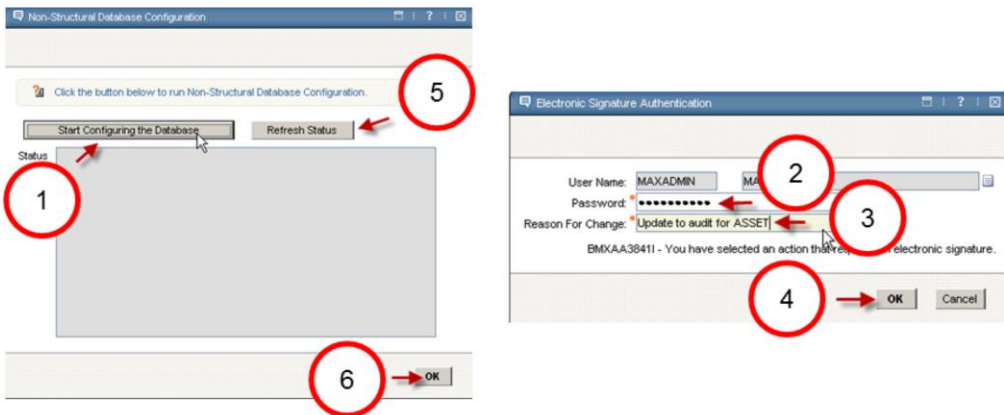
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From the **List** tab in the Database Configuration application, select the **Apply Configuration Changes** option from the **Select Actions** menu.

## Applying configuration changes (2 of 2)

- Click **Start Configuring the Database**
- Enter the password, the reason for change, and click **OK**
- Click **Refresh Status** for updates
- When the database configuration completes, click **OK**



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On the Database Configuration screen, click **Start Configuring Database**.

On the Electronic Signature Authentication screen, enter the password, the reason for configuration, and click **OK**.

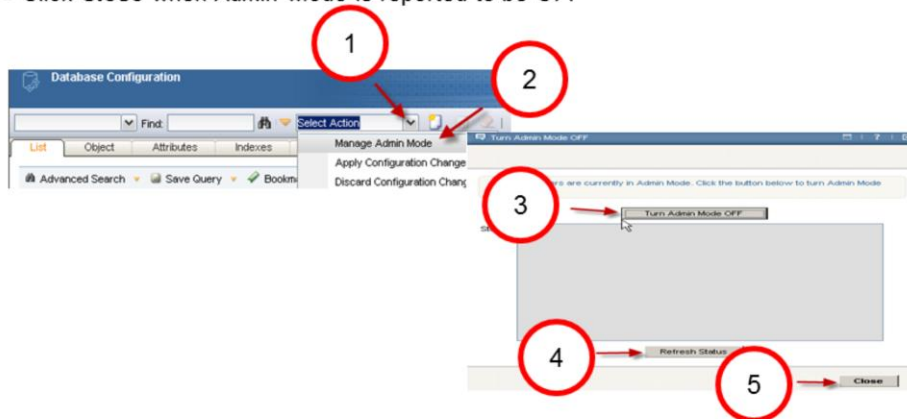
Click **Refresh Status** for database configuration updates.

When the database configuration completes, click **OK** to close the Database Configuration screen.

## Applying configuration changes: Admin Mode off

Perform these steps when turning Admin Mode off:

- Click **Select Action** > **Manage Admin Mode**
- Click **Turn Admin Mode OFF**
- Click **Refresh Status** for updates
- Click **Close** when Admin Mode is reported to be OFF



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On the Database Configuration screen, click the **List** tab.

From the **Select Actions** menu, select the **Manage Admin Mode** option.

On the Turn Admin Mode OFF screen, click **Turn Admin Mode OFF**.

If an electronic signature screen is presented, enter the password, the reason for change as before, and click **OK**.

Updates on the progress can be obtained by clicking **Refresh Status**.

When Admin Mode is off, click **OK** to close the Turn Admin Mode OFF screen.

## Electronic signature authentication screen password entry

Now, changes to an asset in the Assets application where the vendor configuration is being updated requires the user to enter their password

The screenshot shows a dialog box titled "Electronic Signature Authentication". It contains the following fields and text:

- User Name:** A text box containing "MAXADMIN" and a dropdown menu also showing "MAXADMIN".
- Password:** A text box with a yellow background, containing a red asterisk.
- Reason For Change:** A text box with a red asterisk.
- Message:** "BMXA,A3842E - You have modified a field that requires an electronic signature."
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Any future changes to an asset made within the Assets application where the vendor has been updated now require an electronic signature.

The request is generated when the record is saved.

The user must enter their password and a reason for the change to allow the save to complete.

## Summary

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

- Describe how to use the Maximo Asset Management version 7.1 electronic signature feature
- Select application and action attributes for e-signature enablement
- Enable e-signature password entry requirements for specific individual applications and actions prior to allowing configuration changes

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

- Enable electronic signatures
- Select the attributes that require a signature
- Set filters to restrict the requirement to certain applications and actions

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