

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.

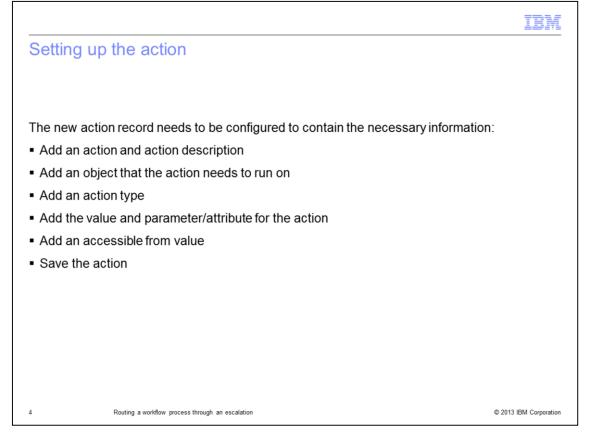
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Objectives	
When you complete this training module you are be able to accomplish these tasks:	
 Create an action record 	
 Configure an escalation record 	
 Activate an escalation record 	
 Route a workflow process through the use of an escalation 	
 Setup an escalation that routes a workflow process automatically, based on a chosen condition 	
2 Routing a workflow process through an escalation © 2013	BM Corporation

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

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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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Find: Select Action	
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Action Description	
3 Routing a workflow process through an escalation © 2013 IBM Corpo	ration

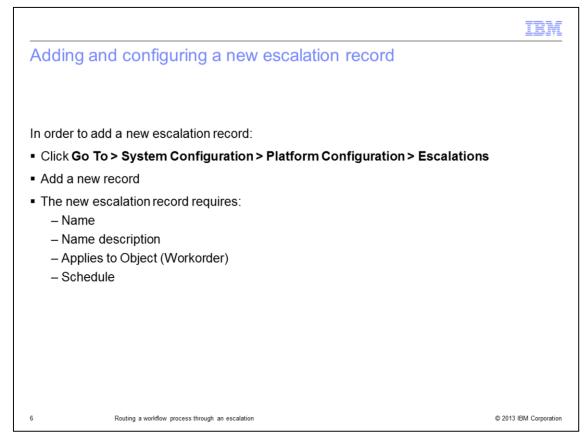
In order to add a new action record click **Go To** > **System Configuration** > **Platform Configuration** > **Actions**. Next, click **New Record**. Observe the creation of a new action record.



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.

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3				Accessible From ALL	
Action	Description	Object	Type 	Value	
5	Routing a workflow process through an	escalation			© 2013 IBM Corporation

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.

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7 Routing a workflow process through an escalation		© 201	3 IBM Corporation

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.

		IBM
Configuring the e	escalation by adding a condition	
 Open the SQL Express 	ssion Builder to configure the escalation condition	
 Enter the expression 	<status 'wappr'="" ==""></status>	
 Click OK to save the 	escalation condition	
	Q SQL Expression Builder □ ↓ ? ↓ ⊙	
	Expression status = WAPPR	
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	OK Cancel	
8 Routing a workfl	low process through an escalation	© 2013 IBM Corporation

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.

			IBN
Configuring the	escalation schedule		
Use the Set Schedu	e option and perform these tasks:		
 Open and configur 	e the schedule dialogue		
 Set the schedule to 	o the required value		
 Click OK to save a 	nd close changes		
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	Select Schedule or Time Interval Select a data interval and then Preview to see the dates.		-
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	C Every hour(s), on minute 00 C Every day(s), at time	8/14/12 4:36 AM 8/14/12 4:38 AM 8/14/12 4:40 AM	
	C Every week(s), on day Sunday w at time C Every month(s),	8/14/12 4:42 AM 8/14/12 4:44 AM 8/14/12 4:46 AM	
		8/14/12 4:48 AM 8/14/12 4:50 AM 8/14/12 4:52 AM	
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	1	8/14/12 5:10 AM	¥1
		ОК Са	ancel

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.

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Adding an actio	on to the escalation		
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 Press the New Roy 	w button to add a new actio	n	
 Select a value 			
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3 Select Action Group or add individual actions by clic	king New Row.	A	ction Group 1040
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0 Routing a v	vorkflow process through an escalation		© 2013 IBM Corporation

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.

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Adding an escal	ation point				
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Use the Select Action	n menu to activate t	the escalation			
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In order to run, the escalation needs an escalation point added.

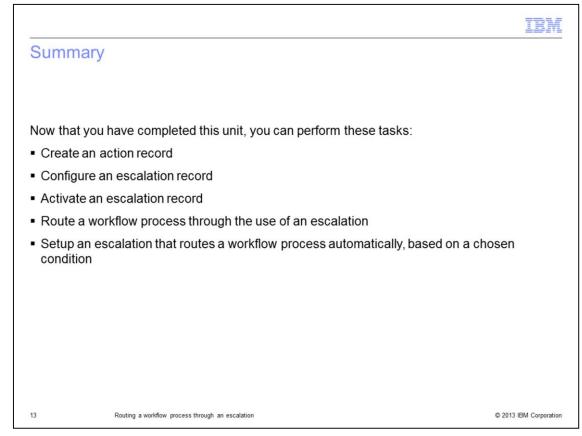
Add a new row under Escalation Points.

Save the escalation record.

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

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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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