

Maximo Application Suite - Manage: Core Data Setup

Course#:MAX4326G
Duration:16 Hours
Price:1900.00

Course Description

This 2-day instructor led course provides students with an understanding of how to create a new Organization and Site in Maximo Manage and discuss the core options available in the Organizations application. They will also be able to create classifications and Location records. Students will learn about topics such as Multi-Organization strategy, GL Account setup and Organization Options. This course also has hands-on lab exercises using a Red Hat OpenShift Maximo Manage environment.

Objectives

After completing this course, you should be able to:

- Describe Multi-Org and Multi-Site strategy
- Plan new Organization and Site records
- Create Item and Company Sets
- Explain the usage of Organization options
- Configure basic Organization Chart of Account settings
- Create a Clearing account
- Create Classification hierarchies
- Understand the usage of Locations
- Create Location Systems

Audience

Consultants, System Administrators, Support, Sales, and Users

Prerequisites

None

Content

Module 1: Core Data Setup Introduction

Discuss the Initial data configuration

Secondary Data Steps

Overview of Users, People and Labor

Define basic required data

Module 2: Initial Setup of a Manage System

Terms and Conditions

Database Setup

Secondary Data and Database Setup

Module 3: Configure Organizations and Sites

Maximo Data Levels

Maximo Sets

Maximo Multi Organization Configuration

Maximo Multi Site Configuration

Module 4: Using Sets for Data Sharing

Describe Maximo Data Sharing

Describe Data sharing in a Multi-Organization environment

Describe Organizations Currencies

Describe Company and Item Sets

Module 5: GL Account Setup

Describe Maximo GL Account Configuration

Describe GL Account Components

Describe Chart of Accounts for Maximo Organizations

Demonstration: Creating Organizations and Sites

Student Exercises: Lab 1 - Creating an Organization

Module 6: Financial Accounts Overview

Describe Maximo Financial Accounts Overview

Describe Financial Periods

Describe Organization Default Accounts

Describe Resource Codes

Describe Various Financial Account Settings

Module 7: Organization Options

Describe Maximo Organization Options

Describe Maximo Site Level Options

Describe Maximo Work Order Options

Describe Maximo Purchase Order Options

Module 8: Defining Classifications

Describe Maximo Classifications Overview

Describe Maximo Classification Use Case

Describe Maximo Classification Setup

Describe Maximo Classification Attributes

Demonstration: Creating Classifications

Student Exercises: Labs 2 - Create Classifications

Module 9: Locations and Location Hierarchies

Describe Maximo Location Definitions

Describe Maximo Location
Describe Maximo Systems
Describe Maximo Location Setup

Demonstration: Creating Locations, Systems and Location Hierarchies

Student Exercises: Lab 3 - Creating Locations, Systems and Location Hierarchies