IBM Maximo Instrument Calibration Manager

Release 3

Installation Guide
Second Edition (January 2007)
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<thead>
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<th>Third-Party Information</th>
</tr>
</thead>
<tbody>
<tr>
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About This Guide

This section explains how this guide can help you to use IBM® Maximo® Instrument Calibration Manager. It also provides information about other IBM Corporation resources available to you, such as additional documentation and support.

Audience

If you are the system administrator, network administrator, or other professional who installs Calibration Manager, read this guide to install Calibration Manager properly into your Maximo 6 installation.

Related Documentation

For more information about Calibration Manager and Maximo, refer to the following documentation:

<table>
<thead>
<tr>
<th>Document</th>
<th>Description</th>
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<tbody>
<tr>
<td>IBM Maximo User's Guide Addendum for Instrument Calibration Manager</td>
<td>The User's Guide Addendum is a separate document delivered in Adobe® Systems' Portable Document Format (PDF) with the product software. Use this along with the standard IBM Maximo documentation set.</td>
</tr>
<tr>
<td>IBM Maximo Online Help for Calibration Manager</td>
<td>Provides step by step instructions for Calibration Manager applications.</td>
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<tr>
<td>IBM Maximo Finance Manager's Guide</td>
<td>Describes how IBM Maximo completes financial transactions and how to set up general ledger accounts.</td>
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<tr>
<td>IBM Maximo Installation Guide</td>
<td>Describes how to install and configure the following software: ▼ Application server ▼ IBM Maximo ▼ Actuate®</td>
</tr>
<tr>
<td>IBM Maximo Multisite Administrator's Guide</td>
<td>Describes how to configure IBM Maximo for a Multisite implementation.</td>
</tr>
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Support

IBM Maximo users with a valid Annual Customer Support Plan (ACSP) can obtain product support online at Support Online: support.mro.com.

Support Online includes information about product releases, software patches, and documentation updates. To find the most current version of a document, refer to the Knowledge Base on this site.

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<tr>
<td><strong>IBM Maximo Reconciliation Module Implementation Guide</strong></td>
<td>Describes how to use the IBM Maximo Reconciliation module to reconcile the two types of information that IBM Maximo maintains about information technology (IT) assets: IT asset data and deployed asset data.</td>
</tr>
<tr>
<td><strong>IBM Maximo Report Administration and Development Guide</strong></td>
<td>Describes how to use Actuate to design and administer IBM Maximo reports.</td>
</tr>
<tr>
<td><strong>IBM Maximo System Administrator’s Guide</strong></td>
<td>Describes database configuration, security, and other administrative level applications and tasks.</td>
</tr>
<tr>
<td><strong>IBM Maximo User’s Guide</strong></td>
<td>Provides an overview of the Maximo end-user applications. It also describes how the IBM Maximo applications interact with each other.</td>
</tr>
<tr>
<td><strong>IBM Maximo Workflow Implementation Guide</strong></td>
<td>Provides information about how to use IBM Maximo to plan, design, build, test, implement, and manage Workflow processes.</td>
</tr>
<tr>
<td><strong>IBM Maximo Enterprise Adapter (MEA) System Administrator’s Guide</strong></td>
<td>Describes how to configure and use the IBM MEA.</td>
</tr>
</tbody>
</table>
This guide takes you through the steps to install Instrument Calibration Manager on a pre-configured Maximo 6.2.1 system.

This chapter describes what you must know before installing the application and briefly describes the features provided by the new Data Sheets application.

The Calibration Manager CD contains six Actuate reports. For information about how to install the reports, see “Installing the Actuate Encyclopedia for Calibration Manager” on page 3-1

Installation Qualifications

Installing Calibration Manager requires system administrator rights and privileges, and a system administrator. To install Calibration Manager, be familiar with the following tasks and technology:

- PC installation tasks, such as creating folders, editing files, and running scripts
- Utilities such as Enterprise Manager® or any database editor such as SQL*Plus for IBM DB2® or Oracle® database servers
- RDBMS system administration privileges

Instrument Calibration Manager Overview

Instrument Calibration Manager provides features for managing instruments and measuring and test equipment.

Using Data Sheets, technicians can create, gather, track and maintain the history of instrument calibration data. They also can track the measurement and test equipment or standard used to calibrate instruments or other measurement and testing equipment.

In order to use data sheets in other Maximo applications, Maximo contains the following cloned applications:

- Assets (Cal)
- Job Plans (Cal)
- Tools (Cal)
- Stocked Tools (Cal)
Instrument Calibration Manager Overview

- Work Order Tracking (Cal)
- Organizations (Cal)

**NOTE** Calibration Manager-specific application names contain “(Cal)”.

If you customized any of the core Maximo applications that the clones are based on, you must make the same customizations to the cloned applications after you install Calibration Manager.
This chapter describes how to install and configure Calibration Manager and provides important information that you must know before installing Calibration Manager.

Installation Checklist

This checklist provides an overview of the installation process. Detailed instructions are found starting on the next page.

**CAUTION** Perform this update in a test environment before updating your production environment.

1. Determine current software version.
2. Stop the Maximo application servers and services.
3. Back up your entire <Maximo> folder.
4. Back up your database.
5. Install Calibration Manager.
6. Install Calibration Manager Keys.
7. Rebuild the EAR files.
8. Restart the Maximo application server.
9. Deploy the EAR files.

Installation Procedures

The procedures described below explain how to install Calibration Manager.

**Determine Current Software Version**

Your Maximo 6 system must include Maximo 6.2.1 before you install Calibration Manager. You must also have Mobile Work Manager Release 3 installed if you are installing Mobile Calibration Manager.
Installation Procedures

Stop the Maximo Application Server

Before you install Calibration Manager, have all users exit Maximo. Stop all Maximo Application servers and services, and exit all other programs.

Create Backups

Before you install Calibration Manager, back up both your entire <Maximo> folder and your database.

Install Calibration Manager

NOTE If you have multiple Maximo folders or directories, install Calibration Manager once for each Maximo folder or directory.

To do this task, complete the following steps:

1. Insert the Calibration Manager CD into the CD-ROM drive.
2. Browse the CD-ROM to choose installs/calibration and run calibration631.exe.
3. Follow the on-screen instructions.

NOTE Installation stops if Maximo 6.2.1 has not been installed.

4. To ensure that you are running the latest release of Calibration Manager, run the PowerUpdate utility toward the end of the installation. The PowerUpdate program checks for and retrieves available updates.

5. Open a DOS window and change directory to <Maximo>/tools/maximo.

6. Run updatedb.bat to update your database with the changes that Calibration Manager requires.

Installing Maximo Keys

Load the Instrument Calibration Manager Key CD and run setup.exe to install the required license files.

Build EAR Files

Rebuild your maximo.ear and maximohelp.ear files. Update your maximo.properties file before you build the EAR files. For more information about building EAR files, refer to your IBM Maximo Installation Guide.
Install the Mobile Calibration Manager

This step is optional. You must have Mobile Work Manager Release 3 installed before you can install Mobile Calibration Work Manager.

To install Mobile Calibration Work Manager, follow the install procedure in the IBM Maximo Mobile Applications Installation Guide.

You must use the following exceptions to the mobile install guide to correctly install Mobile Calibration Work Manager:

- When the mobile install references the IBM Maximo Mobile Applications Software CD, substitute it with the IBM Maximo Mobile Calibration Software CD.
- In Chapter 2, under the heading Running the packagemobile.cmd Process, add pluscmobwo.jar to the files you copy to the mobile device.
- In Chapter 2, under the heading Copying the Contents of the devicesetup Folder to the Mobile Device, add the following after the last step:
  - You must create a shortcut on the device under the \maximo directory. After creating the shortcut, you can copy it and paste it in any directory where you have other Maximo shortcuts on your device. For example:
    Old
    255#"\Program Files\J9\PPRO11\bin\j9w.exe" "-classpath"
    "\maximo\lib\mobilewo.jar;" "-jcl:pproll" "-
    Dpbmic.lic=\maximo\lib\pbmic.lic" "-Dmobiledb=mobilewo"
    "com.mro.mobileapp.WOApp"
    New
    255#"\Program Files\J9\PPRO11\bin\j9w.exe" "-classpath"
    "\maximo\lib\pluscmobwo.jar;" "-jcl:pproll" "-
    Dpbmic.lic=\maximo\lib\pbmic.lic" "-Dmobiledb=pluscmobwo"
    "com.mro.mobileapp.PlusCWOApp"
  - You must create the \maximo\db\pluscmobwo folder on the device.
- In Chapter 2, under the heading Copying CDC Application Bundles to the PDA Device, add pluscmobwo\pluscmobwo.jar to the list of jar files.
- In Chapter 2, under the heading Copying CDC Application Bundles to the Laptop or Tablet Device, add pluscmobwo\pluscmobwo.jar to the list of jar files.
Installing the Actuate Encyclopedia for Calibration Manager

This chapter describes how to install the Actuate Encyclopedia for your Calibration Manager installation.

Actuate Installation Checklist

The following checklist provides an overview of the installation process. Detailed instructions begin on the next page.

CAUTION: Install the Actuate Encyclopedia in a test environment before you install to your production environment.

1. Back up your report encyclopedia folder.
2. Run the Calibration Manager reports installation.
3. Take the Actuate Reports Volume offline.
4. Import the Calibration Manager Encyclopedia.
5. Bring the Actuate Reports Volume online.

Installation Procedure

The procedure described below explains how to install the Encyclopedia for Instrument Calibration Manager.

Install Calibration Manager

Install Calibration Manager before you install Actuate reports. For more information, see “Installation Procedures” on page 2-1.

Back Up Report Encyclopedia

Back up your report encyclopedia before installing the Calibration Manager reports.
Installing Reports

To install reports complete the following steps:

1. Insert the Instrument Calibration Manager CD into the CD-ROM drive on the computer where Actuate iServer is installed.

2. In the installs\reports folder, browse the folder that matches with the name of your operating system and run the executable file.

3. Follow the on-screen instructions.

**NOTE**
If you choose IBM DB2® Universal Database 8.2.7 as the database type, the reports Encyclopedia is installed under the folder <ACTUATE8>/mxescalibration/db2_export/export, where <ACTUATE8> is the folder where Actuate 8.3 is installed on your computer.

If you choose Oracle as the database type, the reports Encyclopedia is installed under the folder <ACTUATE8>/mxescalibration/oracle_export/export. Where <ACTUATE8> is the folder where Actuate 8.3 is installed on your computer.

If you choose SQLServer as the database type, the reports Encyclopedia is installed under the folder <ACTUATE8>/mxescalibration/sqlserver_export/export. Where <ACTUATE8> is the folder where Actuate 8.3 is installed on your computer.

4. If your Maximo and Actuate iServers are running, shut them both down.

5. Restart Maximo Server and then restart the Actuate iServer.

Take Actuate Reports Volume Offline

After completing the preceding procedure, complete the following steps:

1. Log in to Actuate Management console (acadmin console) as System Administrator.

2. Click **Stop** to take Reports Volume offline.

**CAUTION** Do not shut down the Actuate Service.

Import Calibration Manager Encyclopedia

Use the appropriate procedure to import the Encyclopedia for Calibration Manager.

**NOTE** For more information about importing reports, see “Importing the Encyclopedia” in the *IBM Maximo Installation Guide*.

**AIX**

To install Calibration Manager Encyclopedia on AIX®, complete the following steps:

1. Open a shell window.
2 In this shell set the following environment variables:

   a \textbf{CLASSPATH}="<PathToActuate8Folder>/bin/iServer.jar:<PathToActuate8Folder>/bin" for example:
   \begin{verbatim}
   CLASSPATH="/home/mxadim/AcServer/bin/iServer.jar:/home/mxadim/AcServer/bin"
   \end{verbatim}

   b \textbf{LIBPATH}="<PathToActuate8Folder>/lib" for example:
   \begin{verbatim}
   LIBPATH="/home/mxadim/AcServer/lib"
   \end{verbatim}

   c \textbf{ICU_DATA}="<PathToActuate8Folder>/lib" for example:
   \begin{verbatim}
   ICU_DATA="/home/mxadim/AcServer/lib"
   \end{verbatim}

3 Change path to \texttt{<ACTUATE8>/AcServer/bin} folder.

4 Enter the following command to import the encyclopedia: \texttt{./acimport -all -force -username <user_Maximo_Administrator> -password <pwd_Maximo_Administrator> -input <path to the exportfiles>}

Example:

\begin{verbatim}
./acimport -all -force -username maxadmin -password maxadmin -input /home/mxadmin/AcServer/mxscalibration/db2_export/export
\end{verbatim}

\textbf{Microsoft® Windows:} To install Calibration Manager Encyclopedia on Microsoft Windows, complete the following steps:

1 Open a DOS prompt.

2 Change path to \texttt{<ACTUATE8>/iServer/bin} folder.

3 Enter the following command to import the Encyclopedia:
   \texttt{acimport -all -force -username <user_Maximo_Administrator> -password <pwd_Maximo_Administrator> -input <path to the exportfiles>}

   Example:
   \begin{verbatim}
   acimport -all -force -username maxadmin -password maxadmin -input c:\Actuate8\iServer\mxscalibration\db2_export\export
   \end{verbatim}

\textbf{Solaris:} To install Calibration Manager Encyclopedia on Solaris, complete the following steps:

1 Open a shell window.
Installation Procedure

2 Change path to <ACTUATE8>/AcServer/bin folder.

3 Enter the following command to import the encyclopedia:
   
   ```
   ./acimport -all -force -username <user_Maximo_Administrator> -password <pwd_Maximo_Administrator> -input <path to the exportfiles>
   ```

   **Example:**
   
   ```
   ./acimport -all -force -username maxadmin -password maxadmin -input /home/mxadmin/AcServer/mxescalibration/db2_export/export
   ```

Bring Actuate Reports Volume online

To bring Actuate Reports Volume online complete the following steps:

1 Login to Actuate Management console (acadmin console) as System Administrator.

2 Click **Start** to restart Reports Volume.

Check Added Reports

To check that Calibration Manager Encyclopedia has been successfully installed, open Actuate End User Desktop Application and look in the rpt folder.

The rpt folder contains the following new folders and reports:

<table>
<thead>
<tr>
<th>Folder Name</th>
<th>Report Name</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>PM</td>
<td>Calibration Manager Overdue Report</td>
<td>Preventive Maintenance</td>
</tr>
<tr>
<td></td>
<td>Calibration Manager Due Report</td>
<td></td>
</tr>
<tr>
<td>DATASHEET</td>
<td>Data Sheet</td>
<td>Data Sheet</td>
</tr>
<tr>
<td>WOTRACK</td>
<td>Work Order Data Sheet</td>
<td>Work Order Tracking</td>
</tr>
<tr>
<td>ASSET</td>
<td>Asset Traceability Report</td>
<td>Assets</td>
</tr>
<tr>
<td></td>
<td>Reverse Traceability Report</td>
<td></td>
</tr>
</tbody>
</table>

To check the new reports are added to the Encyclopedia and users have access privileges, open the Actuate Management Console and check the settings.

For more information about reports, see the *IBM Maximo Report Administration and Development Guide*.

**NOTE** As the Actuate Reports administrator, you must set up Actuate further to run reports properly.

For more information about enabling reports, refer to your *IBM Maximo Installation Guide*. 
Modify Reports

To modify the Actuate Reports for Calibration Manager, you can copy the source files from the Calibration Manager CD.

The report source is located in:

install/report_source
Installation Procedure
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