Release 6.4

Installation Guide
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About This Publication

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

Intended Audience

If you are a Calibration customer, read this guide to ensure proper installation of Calibration into your Maximo 6 installation.

This guide is designed for the system administrator, network administrator, or other professional who installs Calibration.

Related Documentation

You can find more information regarding Calibration in the following documents:

- **IBM® Maximo® User’s Guide Addendum for Calibration**

  The *IBM Maximo User’s Guide Addendum for Calibration* is a separate document delivered in Adobe® Systems’ Portable Document Format (PDF) with the product software. The guide should be used in conjunction with the standard Maximo Enterprise Suite documentation set.

- **IBM Maximo Mobile Applications Installation Guide**

  The *IBM Maximo Mobile Applications Installation Guide* is a separate document delivered in Adobe Systems’ Portable Document Format (PDF) with the IBM Maximo Mobile Applications product software. This guide is used as a reference to install Mobile Calibration Work Manager.

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

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<thead>
<tr>
<th>Document</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
</tr>
</tbody>
</table>
IBM Support

IBM Software Support provides assistance with product defects.

Before contacting IBM Software Support, your company must have an active IBM software maintenance contract, and you must be authorized to submit problems to IBM. For information about the types of maintenance contracts available, see "Enhanced Support," in the Software Support Handbook at techsupport.services.ibm.com/guides/services.html.

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**Document** | **Description**
--- | ---
*IBM Maximo Installation Guide* | Describes how to install and configure the following software:
- Application server
- IBM Maximo
- Actuate®

*IBM Maximo Multisite Administrator's Guide* | Describes how to configure IBM Maximo for a Multisite implementation.

*IBM Maximo Online Help* | Provides step-by-step procedures for Maximo applications.

*IBM Maximo Reconciliation Module Implementation Guide* | 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
- Deployed asset data.

*IBM Maximo Report Administration and Development Guide* | Describes how to use Actuate to design and administer IBM Maximo reports.

*IBM Maximo System Administrator's Guide* | Describes database configuration, security, and other administrative level applications and tasks.

*IBM Maximo User’s Guide* | Provides an overview of the Maximo end user applications. It also describes how the IBM Maximo applications interact with each other.

*IBM Maximo Workflow Implementation Guide* | Provides information about how to use IBM Maximo to plan, design, build, test, implement, and manage Workflow processes.

*IBM Maximo Enterprise Adapter (MEA) System Administrator’s Guide* | Describes how to configure and use the IBM MEA.
Complete the following steps to contact IBM Software Support with a problem:

1 Define the problem, gather background information, and determine the severity of the problem. For help, see the “Contacting IBM,” in the Software Support Handbook at techsupport.services.ibm.com/guides/beforecontacting.html.

2 Gather diagnostic information.

3 Submit your problem to IBM Software Support in one of the following ways:
   a Online: Click Submit and track problems on the IBM Software Support site at www.ibm.com/software/support/probsub.html.
   b By telephone: For the telephone number to call in your country, go to the Contacts page of the IBM Software Support Handbook at techsupport.services.ibm.com/guides/contacts.html.

If you submit a problem that is a software defect or for missing or inaccurate documentation, IBM Software Support creates an Authorized Program Analysis Report (APAR). The APAR describes the problem in detail.

Whenever possible, IBM Software Support provides a workaround that you can implement until the APAR is resolved and a fix is delivered. IBM publishes resolved APARs on the Software Support Web site daily, so that other users who experience the same problem can benefit from the same resolution.
This guide takes you through the steps to install Calibration on a pre-configured Maximo 6.2.1 system.

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

There are 12 Actuate reports included on the Calibration CD. Installing the reports is described in “Installing the Actuate Encyclopedia for Calibration” on page 3-1.

Installation Qualifications

Installing Calibration requires system administrator rights and privileges, and should be performed by a system administrator. To perform the installation, you should be familiar with the following:

- PC installation tasks such as creating folders, editing files, and running scripts
- Utilities such as Enterprise Manager or SQL*Plus for Oracle
- RDBMS system administration privileges

Calibration Overview

Calibration provides functionality 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, Calibration clones the following applications:

- Assets
- Job Plans
- Locations
- Organizations
- Preventive Maintenance
Calibration Overview

- Master PM
- Stocked Tools
- Tools
- Work Order Tracking

If you customized any of these applications, you must modify them when you install Calibration.
Installing Calibration

This chapter describes how to install and configure Calibration and provides important information that you must know before installing Calibration.

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 prior to updating your production environment.

[ ] 1 Determine current software version.

[ ] 2 Stop the Maximo application server(s)/service(s).

[ ] 3 Back up your entire <Maximo> folder.

[ ] 4 Back up your database.

[ ] 5 Install Calibration.

[ ] 6 Install Calibration 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.

Determine Current Software Version

You must have Maximo 6.2.1 installed before you install Calibration.

**WARNING** If you have Mobile Calibration Manager installed, it will not function after you install this release.
Installation Procedures

Stop the Maximo Application Server

Have all users exit Maximo, stop all Maximo Application Servers and services and exit all other programs before beginning the installation process.

Create Backups

Before you install Calibration you should create a backup of both your entire <Maximo> folder and your database.

Install Calibration

**NOTE**
If you have multiple Maximo folders or directories you will need to run the installation once for each Maximo folder or directory.

**WARNING**
If you have Mobile Calibration Manager installed, it will not function after you install this release.

To do this task, complete the following steps:

1. Insert the Calibration CD into the CD-ROM drive.
2. Browse the CD-ROM to choose installs/calibration and run calibration64.exe.
3. Follow the on-screen instructions.

**CAUTION**
Installation will not continue if Maximo 6.2 has not been installed.

4. Open up a DOS window and change directory to <Maximo>/tools/maximo.
5. Run updatedb.bat. This updates your database with the changes required by Calibration.

Installing Maximo Keys

Load the Calibration Key CD and run setup.exe. This installs the required license files.

Build EAR Files

Rebuild your maximo.ear and maximohelp.ear files. It is important that your maximoproperties file is up to date before building the EAR files. For more information on building EAR files refer to your IBM Maximo Installation Guide.

Restart the Application Server and Deploy EAR Files

You must restart the Maximo application server and redeploy your EAR files in order for the Calibration changes to be available to users. Refer to your Maximo Installation Guide for information on deploying EAR files.
This chapter describes how to install the Actuate Encyclopedia for your Calibration installation.

**Actuate 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 prior to updating your production environment.

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

**Installation Procedure**

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

**Install Calibration**

Calibration should be installed before installing the Actuate reports. See “Install Calibration” on page 2-2.

**Back Up Report Encyclopedia**

You should back up your report encyclopedia before installing the Calibration reports.
Installation Procedure

Installing Reports

To install reports complete the following steps:

1. Insert the Calibration 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.

4. If you choose Oracle as the database type, the reports Encyclopedia will be installed under the folder `<ACTUATE8>/mxescalibration64/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 will be installed under the folder `<ACTUATE8>/mxescalibration64/sqlserver_export/export`. Where `<ACTUATE8>` is the folder where Actuate 8.3 is installed on your computer.

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

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

Take Actuate Reports Volume Offline

After the above procedure completes successfully:

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

2. Click Stop to take Reports Volume offline.

   **NOTE** Do not shutdown the Actuate Service.

Import Calibration Encyclopedia

Use the appropriate procedure to import the Encyclopedia for Calibration.

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

**AIX users Only:** To install Calibration Encyclopedia on AIX complete the following steps:

1. Open a shell window.

2. In this shell set the following environment variables:

   a. `CLASSPATH=<PathToActuate8Folder>/bin/iServer.jar:<PathToActuate8Folder>/bin` for example:
Installation Procedure

CLASSPATH="/home/mxadmin/AcServer/bin/iServer.jar:/home/mxadmin/AcServer/bin"
export CLASSPATH

b  LIBPATH="<PathToActuate8Folder>/lib" for example:

LIBPATH="/home/mxadmin/AcServer/lib"
"export LIBPATH"

c  ICU_DATA="<PathToActuate8Folder>/lib" for example:

ICU_DATA="/home/mxadmin/AcServer/lib"
"export ICU_DATA"

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

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

   ./acimport -all -force -username maxadmin -password maxadmin -input /home/mxadmin/AcServer/mxescalibration64/oracle_export/export

WINDOWS:

To install Calibration Encyclopedia on Windows complete the following steps:

1  Open a DOS prompt

2  Change path to <ACTUATE8>/iServer/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>
   for example:

   acimport -all -force -username maxadmin -password maxadmin -input c:\Actuate8\iServer\mxescalibration64\oracle_export\export

SOLARIS:

To install Calibration Encyclopedia on Solaris complete the following steps:

1  Open a shell window

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>
   for example:

   ./acimport -all -force -username maxadmin -password maxadmin -input /home/mxadmin/AcServer/mxescalibration64/oracle_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.
Installation Procedure

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

## Verify Added Reports

To verify that Calibration 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 Overdue Report</td>
<td>Preventive Maintenance</td>
</tr>
<tr>
<td></td>
<td>Calibration Due Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PMs With Extended Dates</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PM Extended Dates with History</td>
<td></td>
</tr>
<tr>
<td>JOBPLAN</td>
<td>Open Work Orders with Revised Job Plans</td>
<td>Job Plans</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>Asset Reverse Traceability Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Calibraiton Drift Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Asset Stability Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Calibration Error Report</td>
<td></td>
</tr>
</tbody>
</table>

To verify 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 additional Actuate functionality to run reports properly.

For more information about enabling reports, see *Enabling Reports to Run* of the *IBM Maximo Installation Guide*.

## Modify Reports

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

The report source is located in:

```
installs/report_source
```
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