



USER GUIDE

Import /Export csv files from IBM Maximo to WISPE



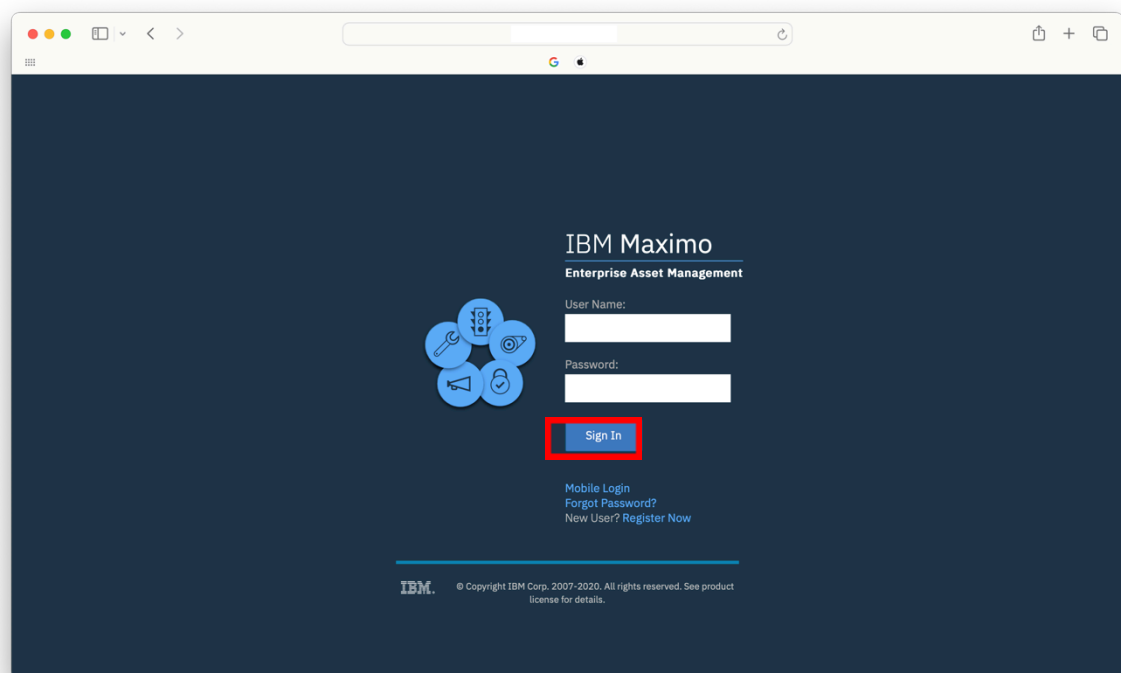
Introduction

Our platform - WISPE is a mobile-first solution designed to address on-field challenges faced by operation/maintenance teams. With modules for Work, Inventory, Safety, and Permit Management, WISPE offers a customizable approach to fit your unique needs. WISPE is Cross-Platform Compatibility - Access WISPE on Windows, iOS, and Android devices. WISPE is Flexible Deployment: Choose from cloud, hybrid cloud, or on-premise options.

This User Guide will walk you through the steps of importing and exporting CSV files between WISPE and Maximo on your Windows device.

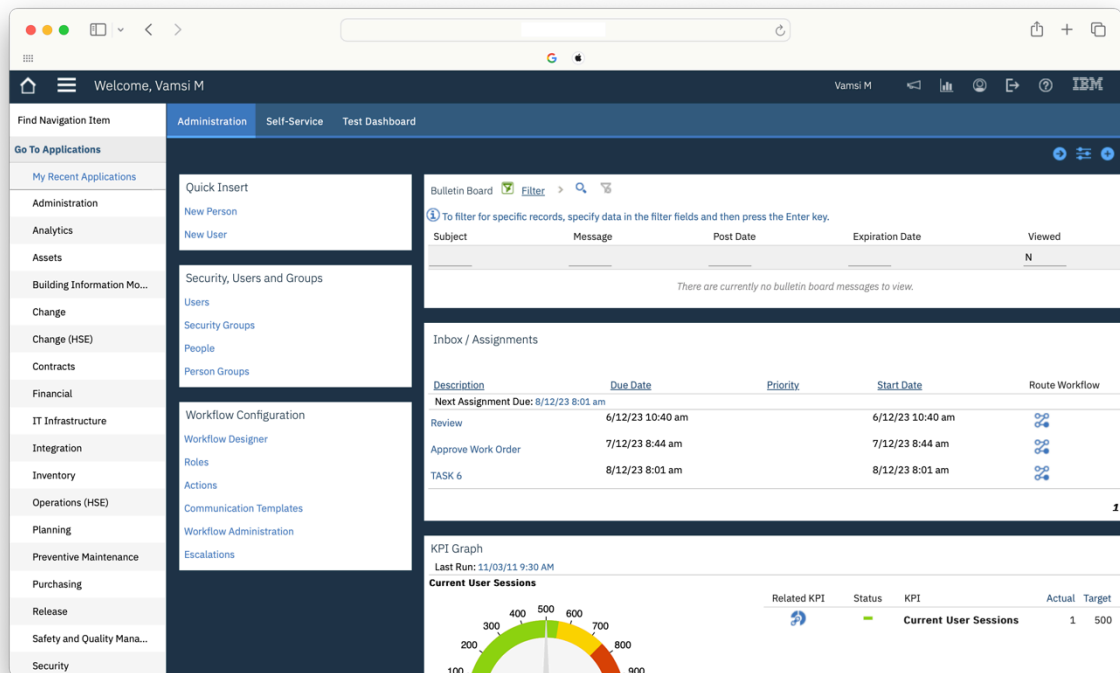
Step 1:

Login into Maximo with your Username and Password.



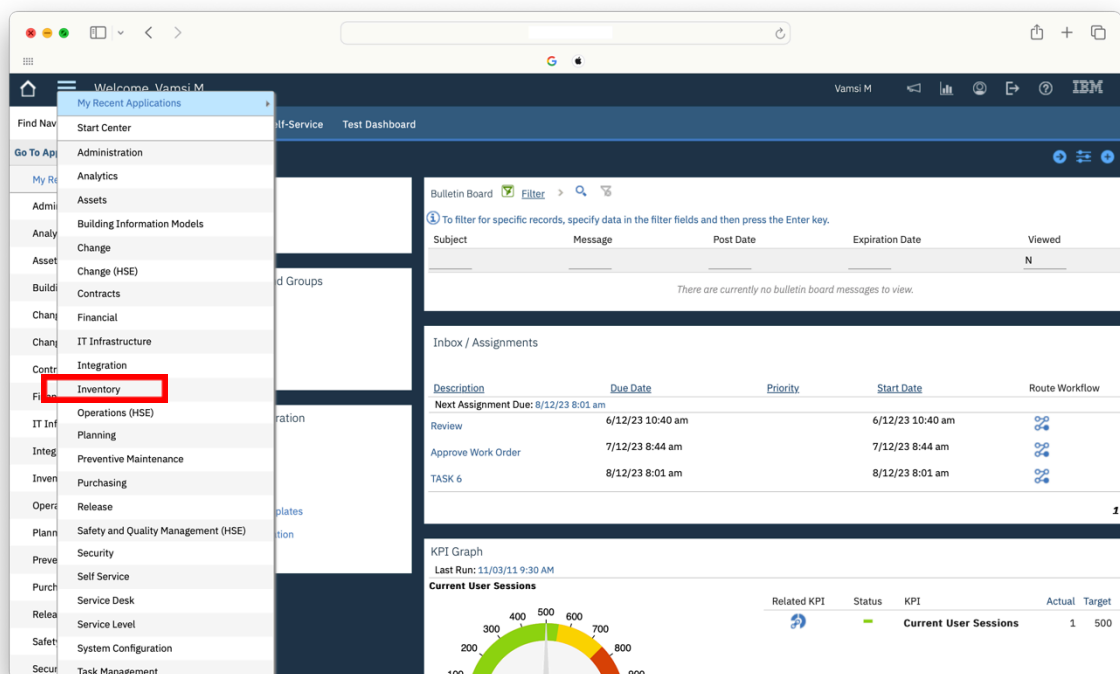
Step 2:

You will be redirected to Maximo Start Center screen



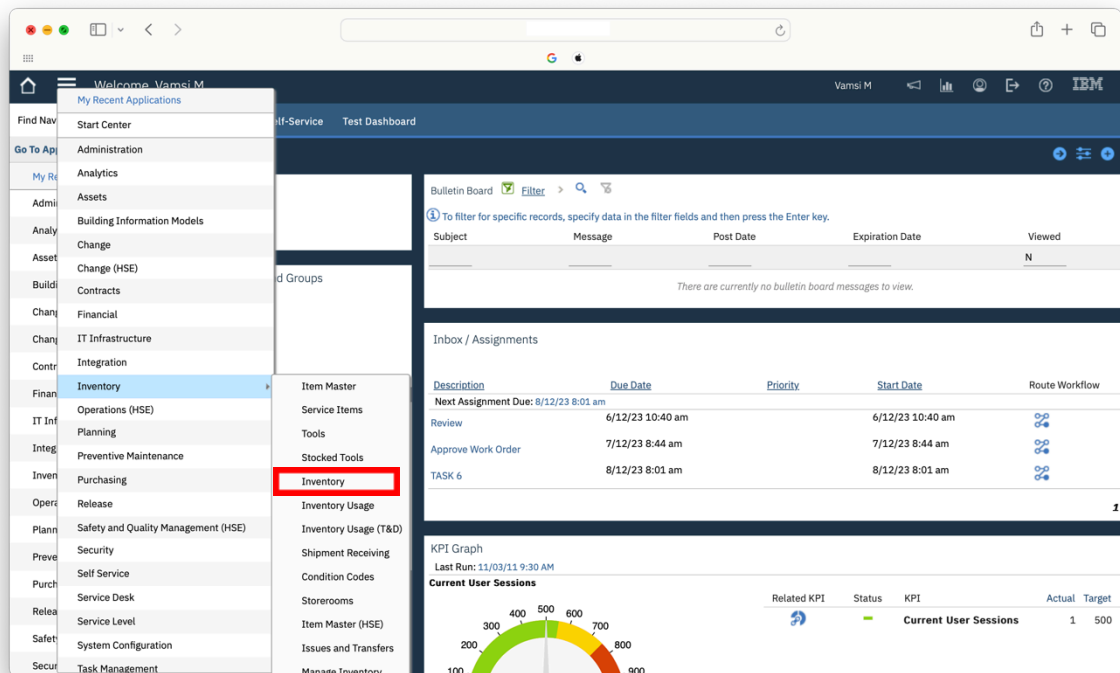
Step 3:

Click on **Inventory Application**



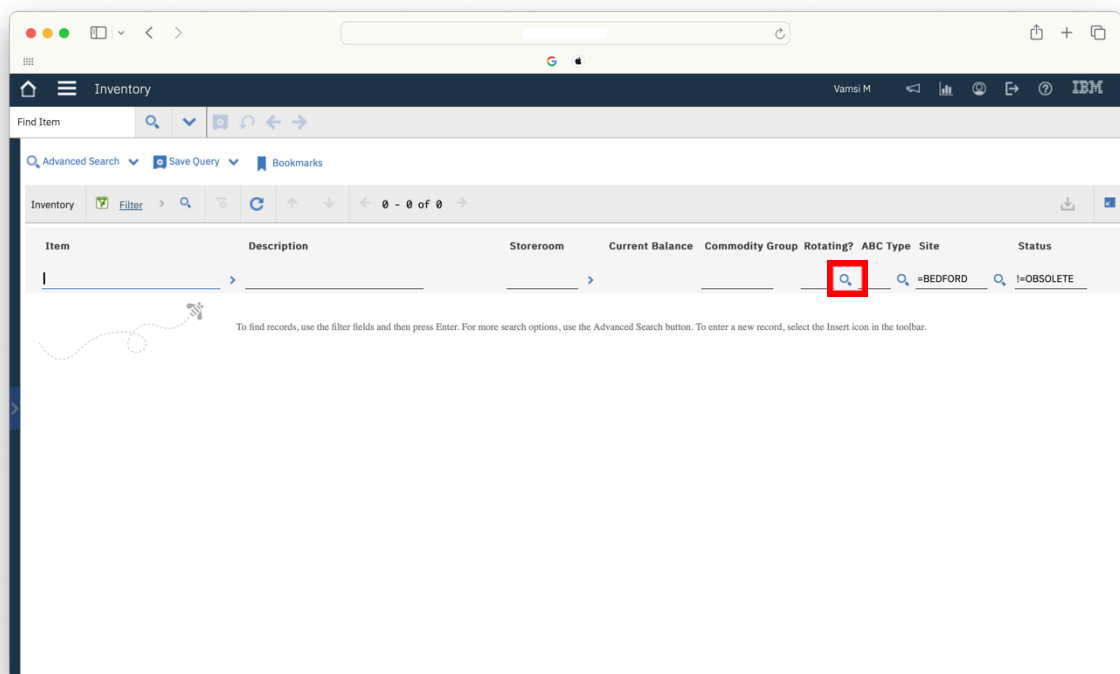
Step 4:

Click on **Inventory**



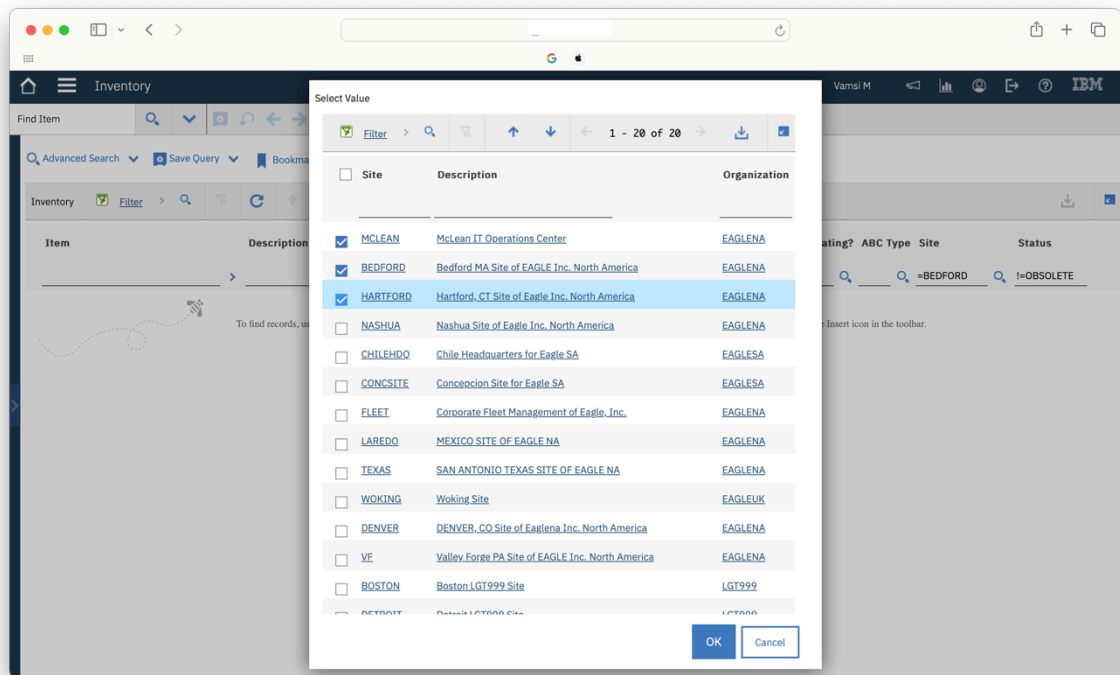
Step 5:

Choose your search option using the lookup icon.



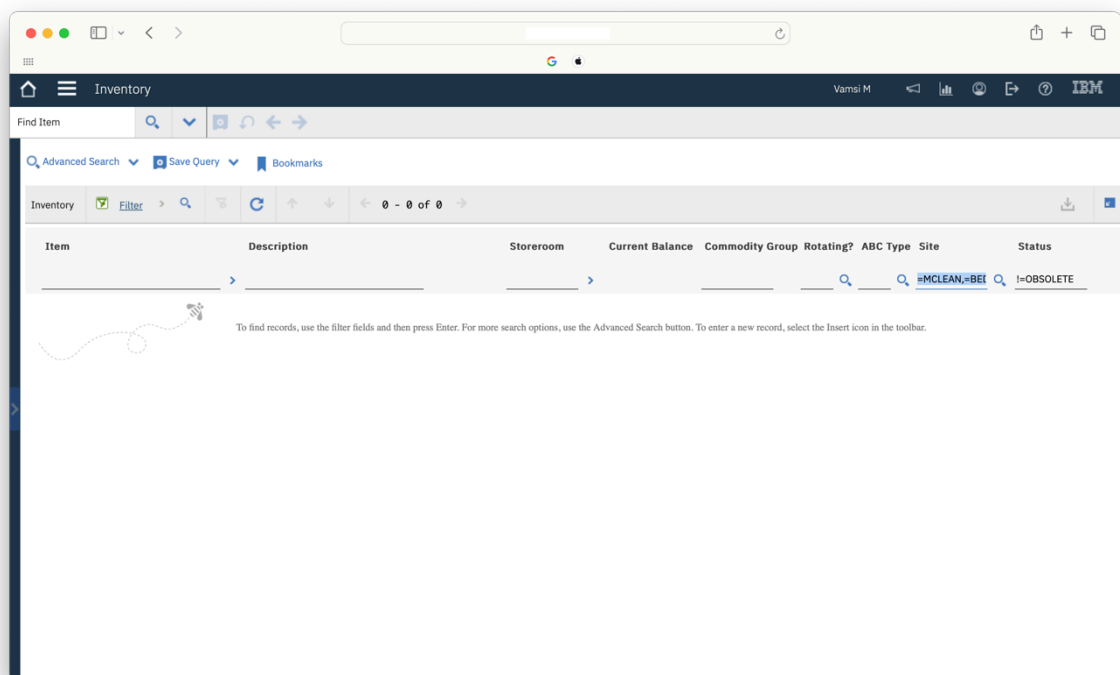
Step 6:

You can select multiple options from which the records can be displayed.



Step 7:

Click **enter** to display the records of selected search options.



Step 8:



Click on **Application Export** below the Custom actions in the left side bar.

Inventory

Find Item

Find Navigation Item

Go To Applications

Available Queries

All Records

All Bookmarks

Items with Reservations

Common Actions

Change Status

Create KPI

Create Report

Application Export

Application Import

More Actions

Reorder

Add/Modify Reservations

Change Cost Type

Inventory Adjustments

Unit of Measure and Conversion

Attachment Library/Folders

Advanced Search

Save Query

Bookmarks

Inventory

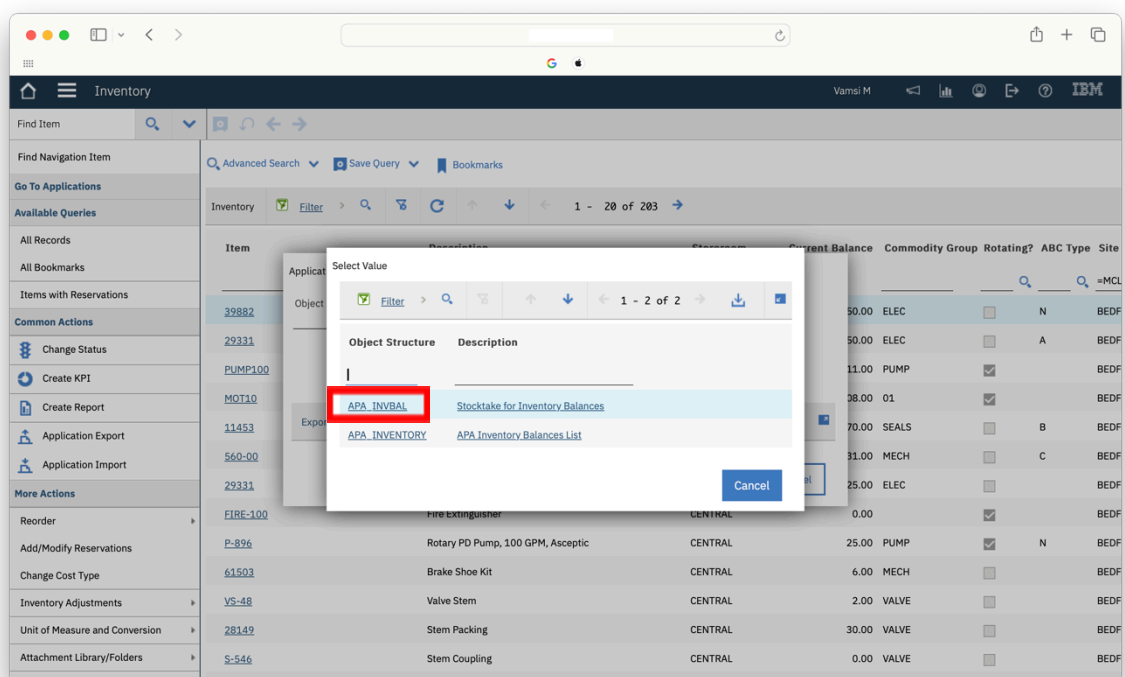
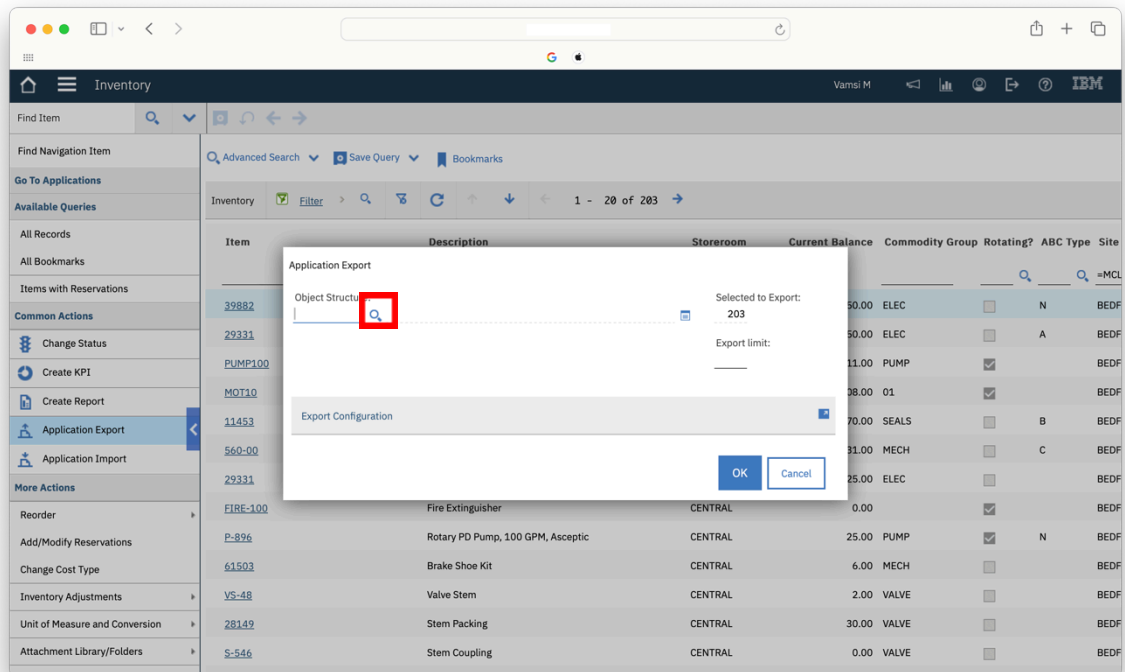
Filter

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Item	Description	Storeroom	Current Balance	Commodity Group	Rotating?	ABC Type	Site
39882	Light Bulb, Fluorescent- 36 In Long	CENTRAL	50.00	ELEC	<input type="checkbox"/>	N	BEDF
29331	Building Thermostat	PKG	150.00	ELEC	<input type="checkbox"/>	A	BEDF
PUMP100	Centrifugal Pump 100 GPM, 60 FT-HD	CENTRAL	11.00	PUMP	<input checked="" type="checkbox"/>		BEDF
MOT10	Motor- 10hp/1750rpm/TEFC/254T Frame/440v/3ph/60hz	CENTRAL	108.00	01	<input checked="" type="checkbox"/>		BEDF
11453	Seal, Mechanical, Self Aligning- 1 In ID	MACHSHOP	70.00	SEALS	<input type="checkbox"/>	B	BEDF
560-00	Tubing, Copper-1 In ID X .030 In Wall	MACHSHOP	31.00	MECH	<input type="checkbox"/>	C	BEDF
29331	Building Thermostat	CENTRAL	25.00	ELEC	<input type="checkbox"/>		BEDF
FIRE-100	Fire Extinguisher	CENTRAL	0.00		<input checked="" type="checkbox"/>		BEDF
P-896	Rotary PD Pump, 100 GPM, Asceptic	CENTRAL	25.00	PUMP	<input checked="" type="checkbox"/>	N	BEDF
61503	Brake Shoe Kit	CENTRAL	6.00	MECH	<input type="checkbox"/>		BEDF
VS-48	Valve Stem	CENTRAL	2.00	VALVE	<input type="checkbox"/>		BEDF
28149	Stem Packing	CENTRAL	30.00	VALVE	<input type="checkbox"/>		BEDF
S-546	Stem Coupling	CENTRAL	0.00	VALVE	<input type="checkbox"/>		BEDF

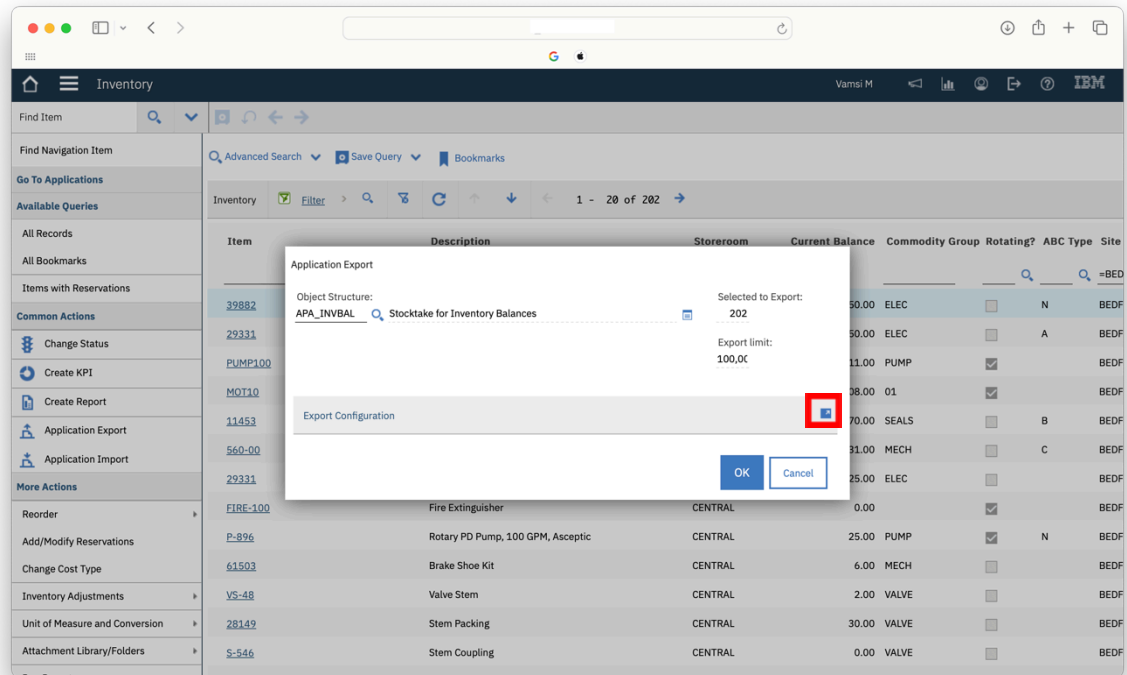
Step 9:

In the Application Export pop up, select the **APA_INVBAL** object structure by clicking the lookup icon.



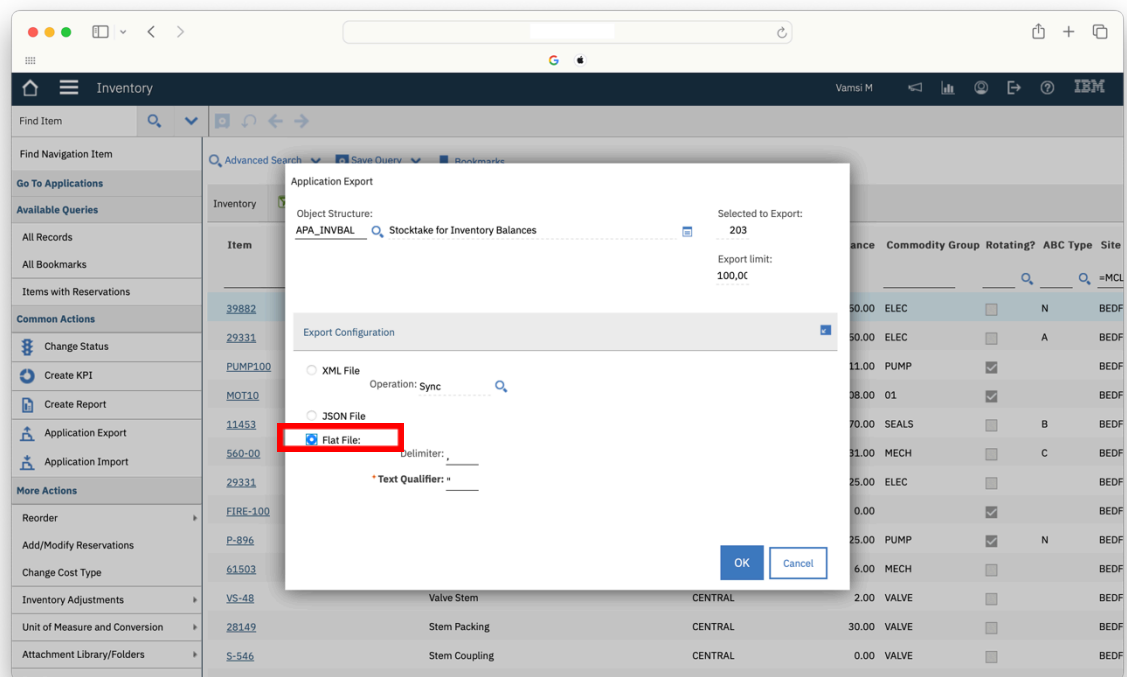
Step 10:

Click the expand icon in the export configuration tile.



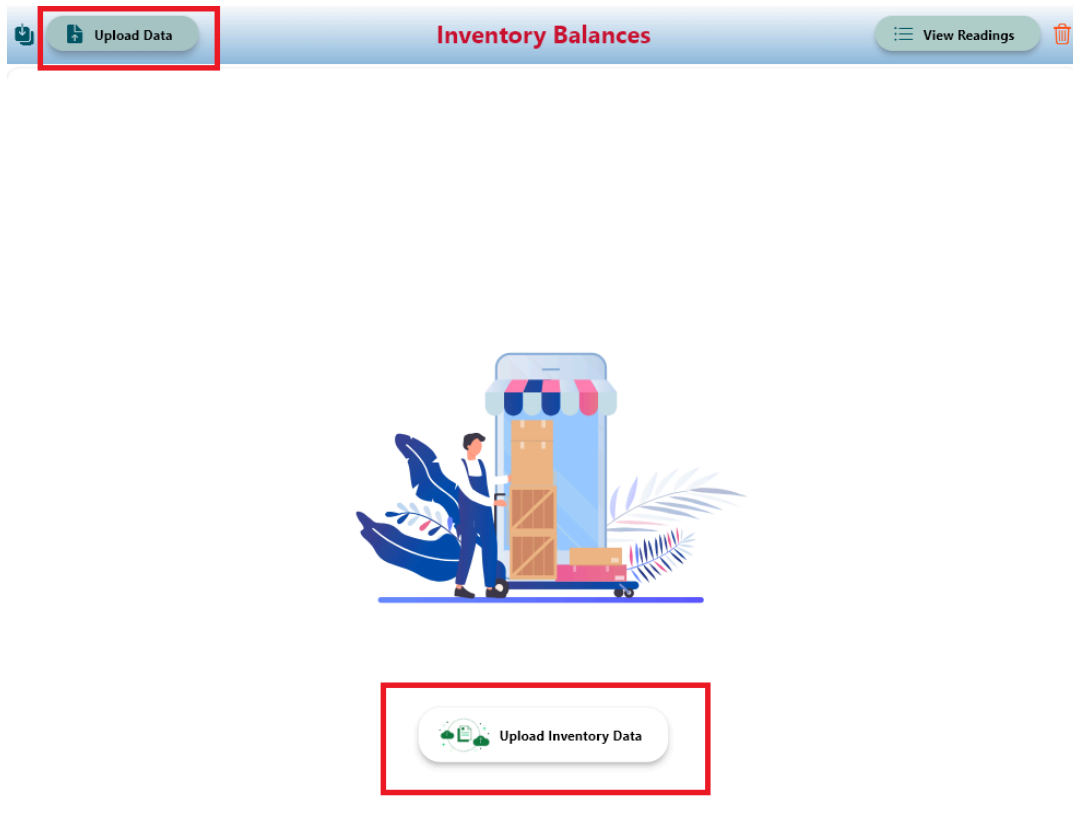
Step 11:

Select **Flat File** and click **OK** to download it as .csv file.



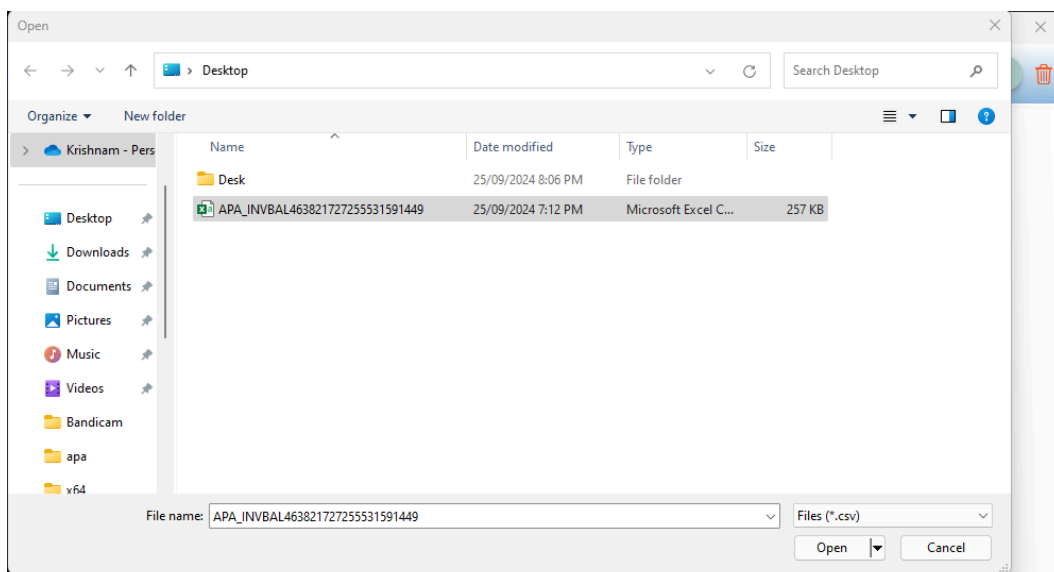
Step 12:

Click on the **Upload Inventory Data button/ Upload Data button** to pull the inventory data exported from Maximo in .csv format.



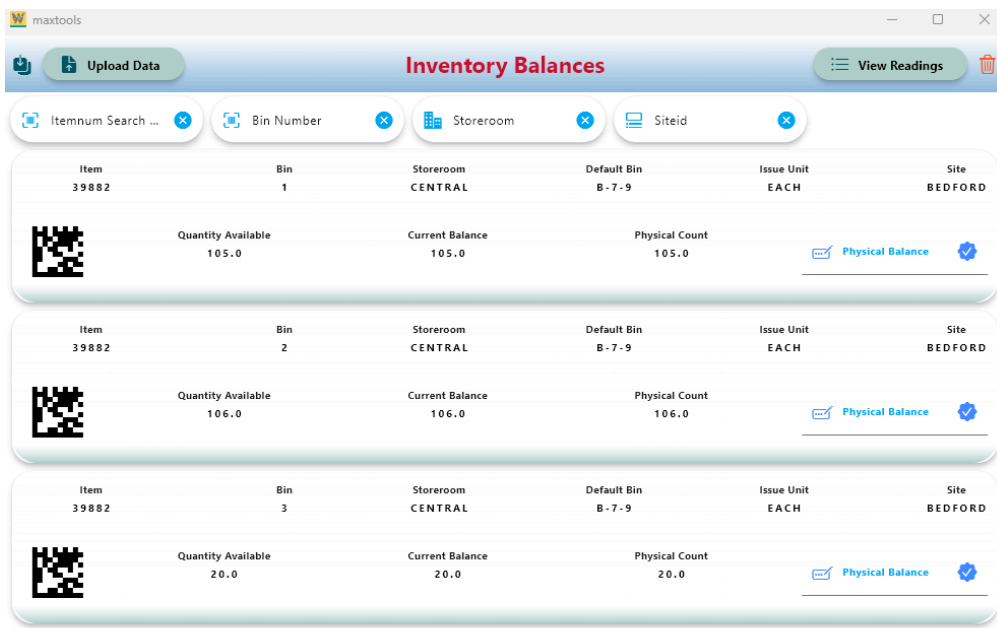
Step 13:




Select your .csv file.



Step 14:

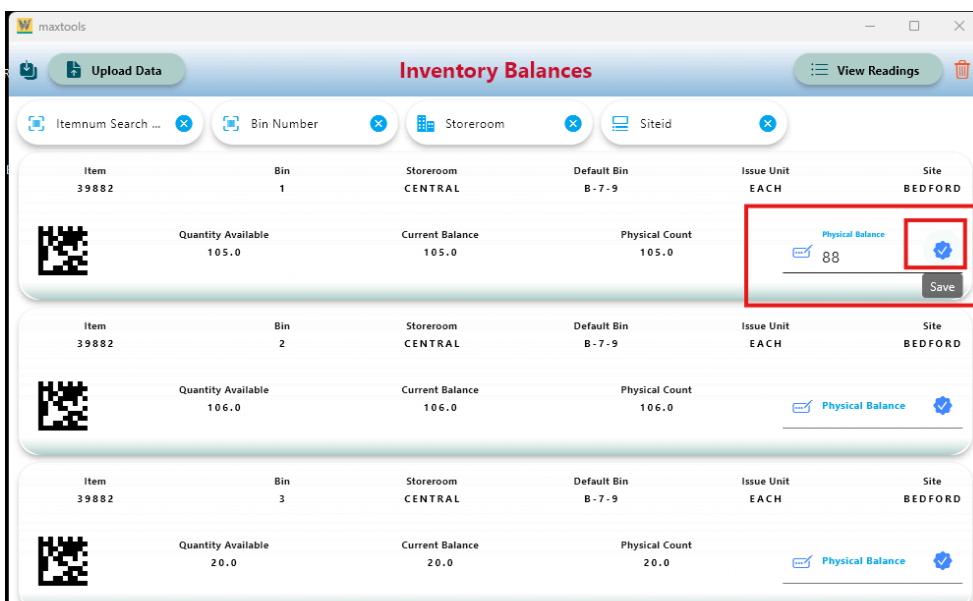
All your inventory balances should be displayed as a list.






Item	Bin	Storeroom	Default Bin	Issue Unit	Site
39882	1	CENTRAL	B - 7 - 9	EACH	BEDFORD
	Quantity Available 105.0	Current Balance 105.0	Physical Count 105.0	Physical Balance	<input checked="" type="checkbox"/>
39882	2	CENTRAL	B - 7 - 9	EACH	BEDFORD
	Quantity Available 106.0	Current Balance 106.0	Physical Count 106.0	Physical Balance	<input checked="" type="checkbox"/>
39882	3	CENTRAL	B - 7 - 9	EACH	BEDFORD
	Quantity Available 20.0	Current Balance 20.0	Physical Count 20.0	Physical Balance	<input checked="" type="checkbox"/>

Step 15:

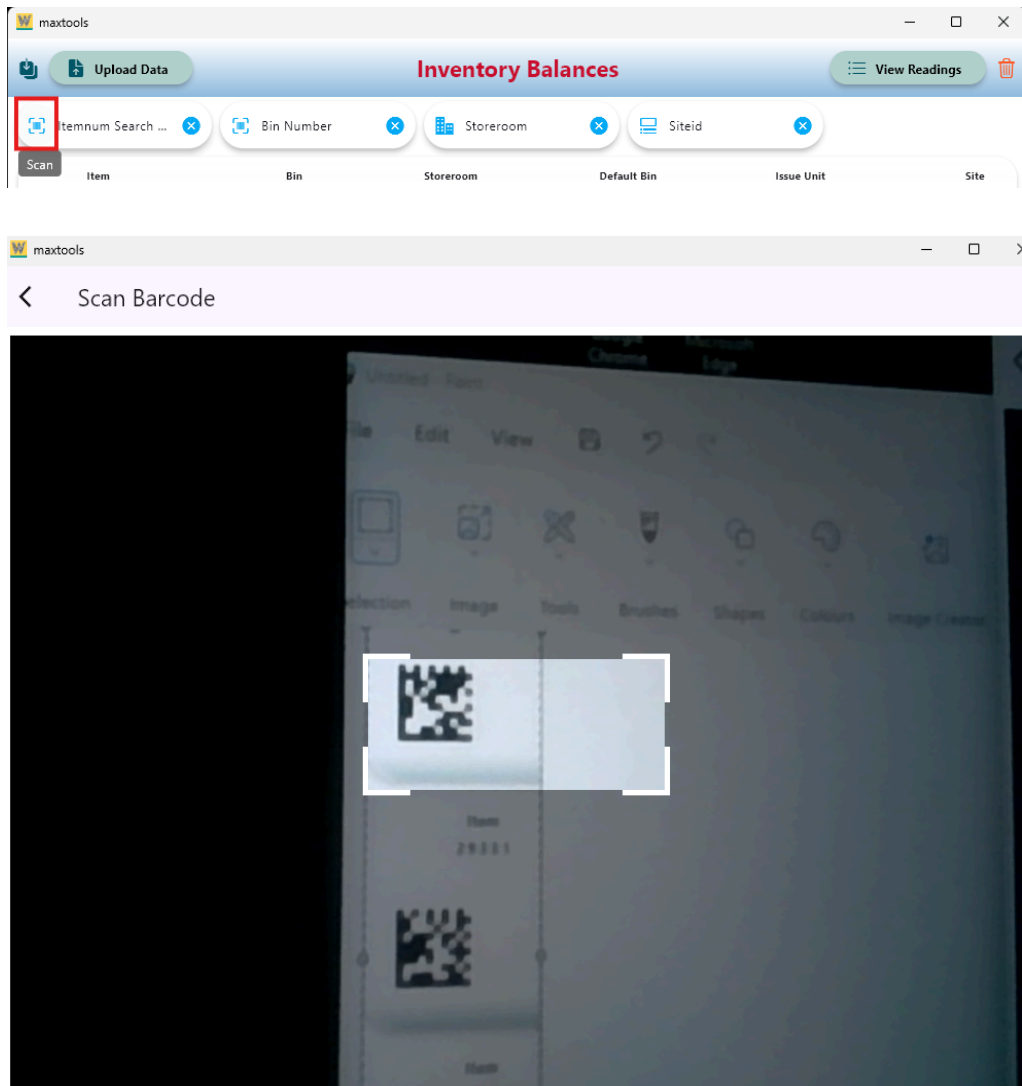
You can change the balance by clicking on Physical balance and clicking the tick icon to save the process.



Item	Bin	Storeroom	Default Bin	Issue Unit	Site
39882	1	CENTRAL	B - 7 - 9	EACH	BEDFORD
	Quantity Available 105.0	Current Balance 105.0	Physical Count 105.0	Physical Balance 88	<input checked="" type="checkbox"/> Save
39882	2	CENTRAL	B - 7 - 9	EACH	BEDFORD
	Quantity Available 106.0	Current Balance 106.0	Physical Count 106.0	Physical Balance	<input checked="" type="checkbox"/>
39882	3	CENTRAL	B - 7 - 9	EACH	BEDFORD
	Quantity Available 20.0	Current Balance 20.0	Physical Count 20.0	Physical Balance	<input checked="" type="checkbox"/>

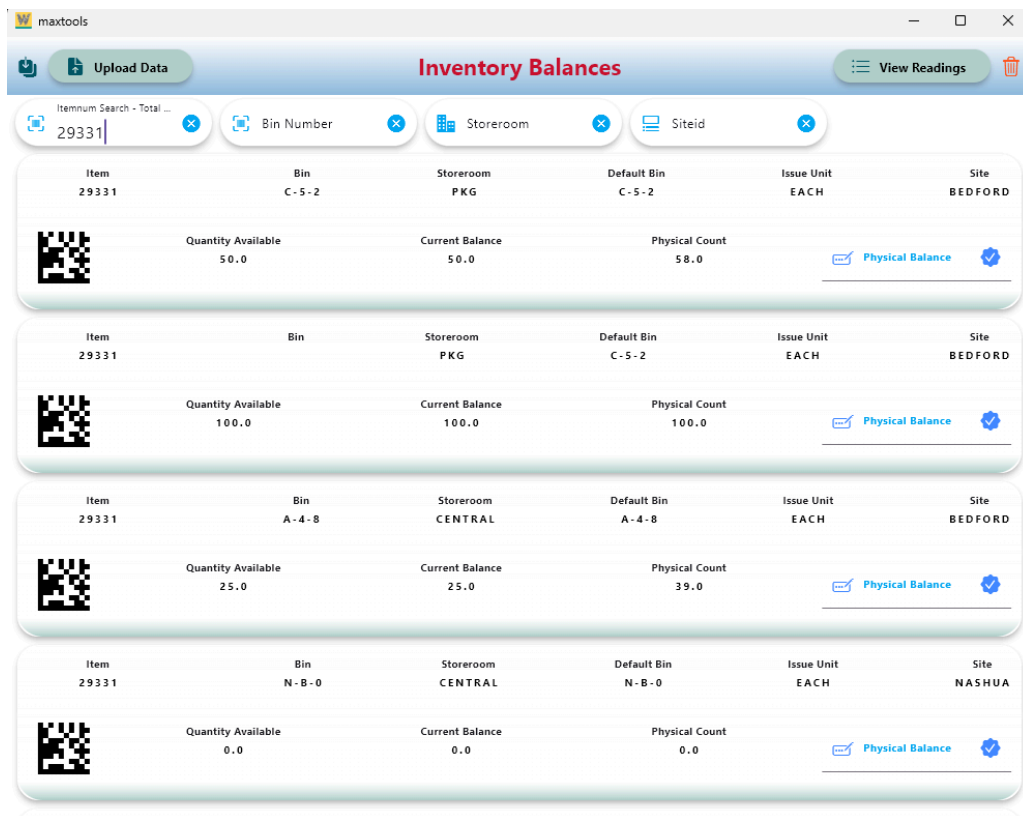
Step 16:

You can use the scan **barcode** option to search through the inventory data by **Item number/ Bin number**.



Step 17:

Type in directly on the input box for each entity to search based on the Item number, Bin Number, Storeroom or Siteid.

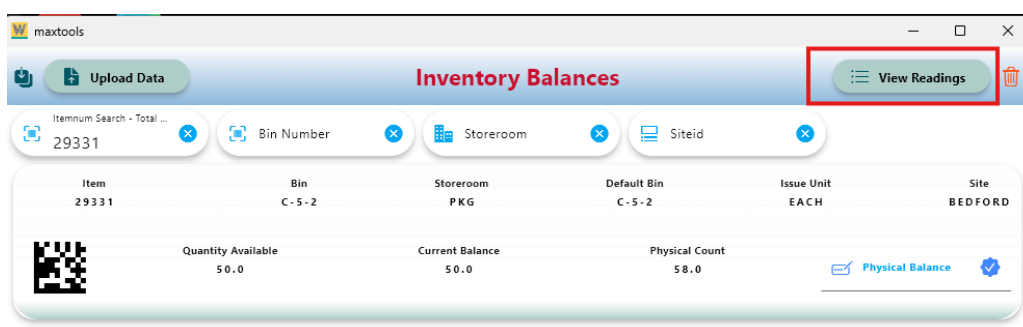


The screenshot shows the 'Inventory Balances' interface with the following search filters: Itemnum Search - Total ... (29331), Bin Number, Storeroom, and Siteid. The table displays inventory data for Item 29331 across four different locations.

Item	Bin	Storeroom	Default Bin	Issue Unit	Site
29331	C - 5 - 2	PKG	C - 5 - 2	EACH	BEDFORD
Quantity Available	50.0	Current Balance	50.0	Physical Count	58.0
Quantity Available	100.0	Current Balance	100.0	Physical Count	100.0
Quantity Available	25.0	Current Balance	25.0	Physical Count	39.0
Quantity Available	0.0	Current Balance	0.0	Physical Count	0.0

Step 18:

Click on the **View Reading** button to list all the inventory readings.



The screenshot shows the 'Inventory Balances' interface with the 'View Readings' button highlighted in a red box. The search filters and table data are the same as in the previous screenshot.



maxtools

Inventory Readings

Itemnum Search - Total 6 Bin Search Select Storeroom

Item 39882	Bin 1	Storeroom CENTRAL	New Balance 67	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T07:34					
Item 39882	Bin 2	Storeroom CENTRAL	New Balance 67	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T07:34					
Item 39882	Bin 3	Storeroom CENTRAL	New Balance 89	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T07:34					
Item 39882	Bin 1	Storeroom CENTRAL	New Balance 88	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T08:10					
Item 29331	Bin	Storeroom PKG	New Balance 69	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T08:10					
Item PUMP100	Bin F-4-2	Storeroom CENTRAL	New Balance 88	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T08:10					

Step 19:

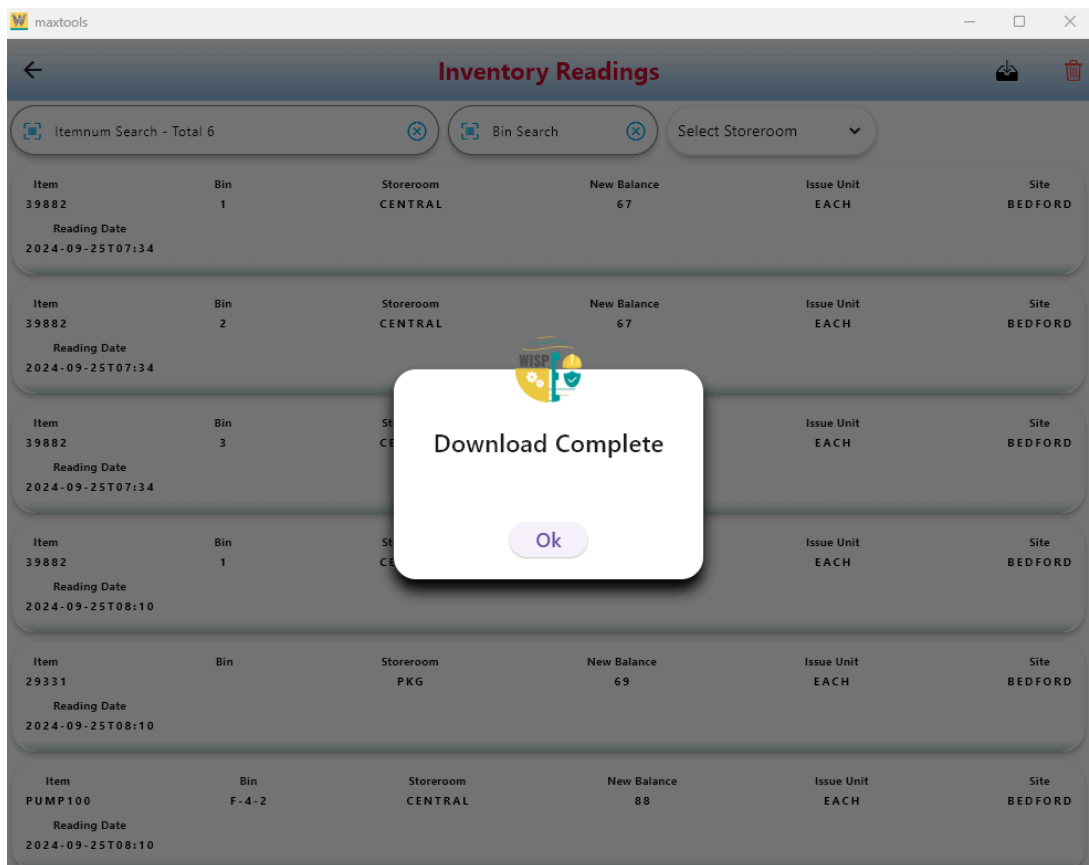
Click on the download icon at the top right to download all the inventory readings.

maxtools

Inventory Readings

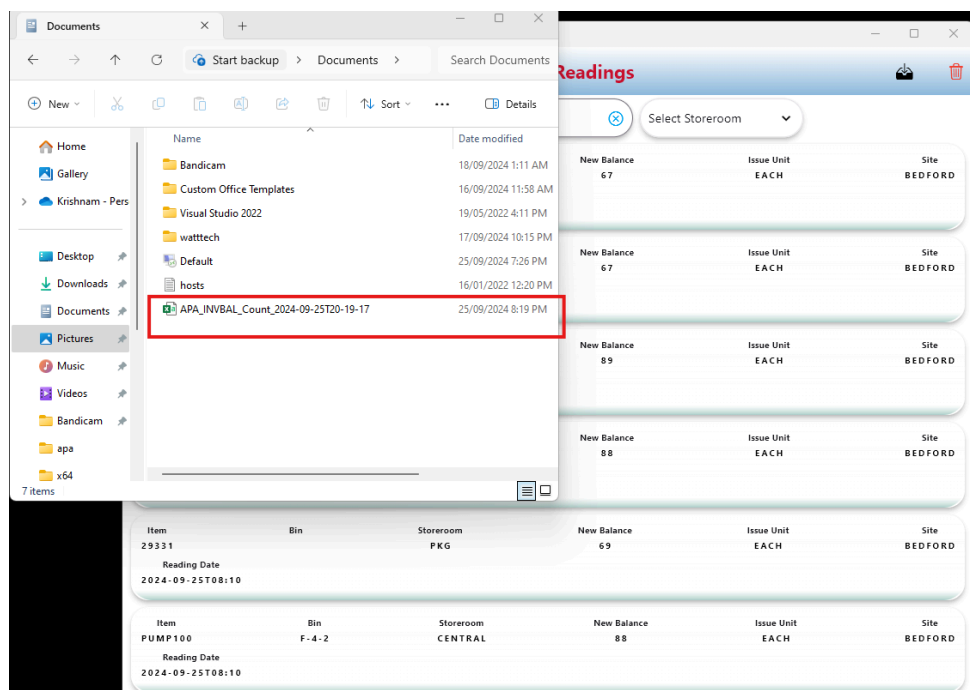
Itemnum Search - Total 6 Bin Search Select Storeroom

Item 39882	Bin 1	Storeroom CENTRAL	New Balance 67	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T07:34					
Item 39882	Bin 2	Storeroom CENTRAL	New Balance 67	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T07:34					
Item 39882	Bin 3	Storeroom CENTRAL	New Balance 89	Issue Unit EACH	Site BEDFORD
Reading Date 2024-09-25T07:34					



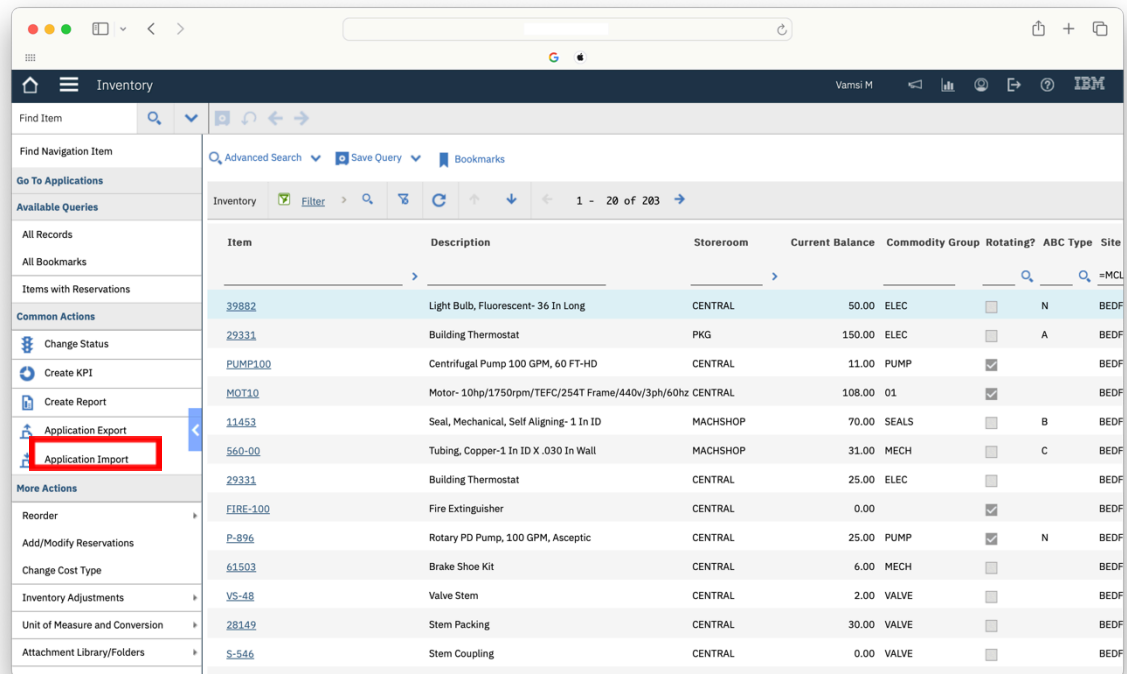
Step 20:

The Inventory reading will be downloaded in the .csv format.



Step 21:

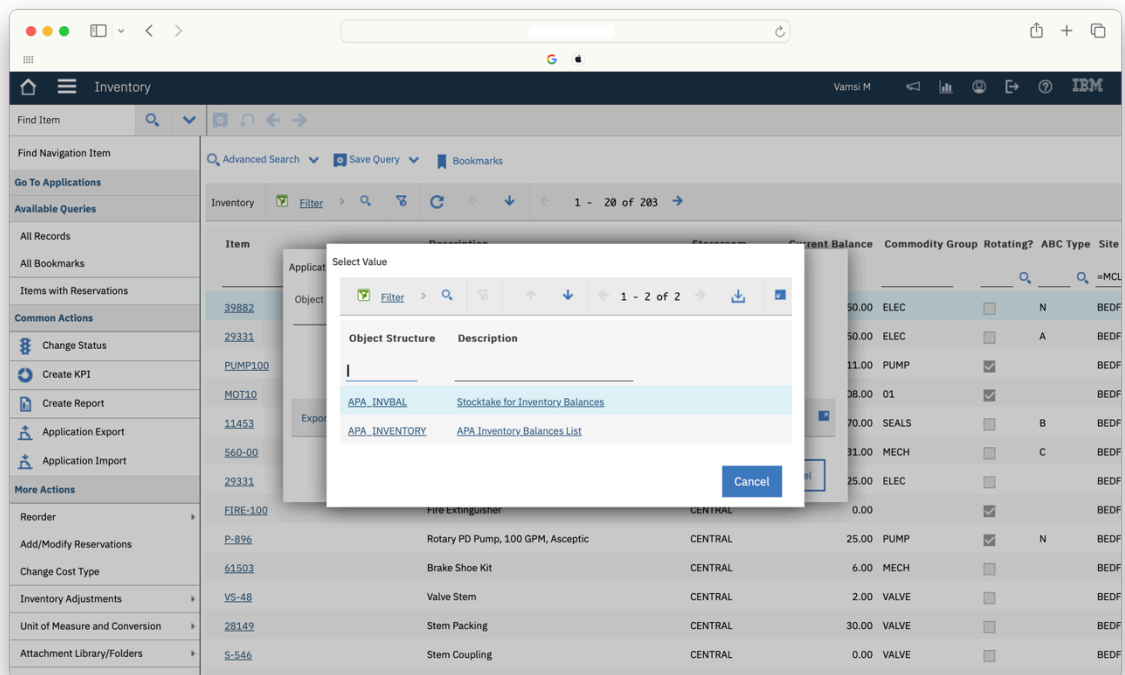
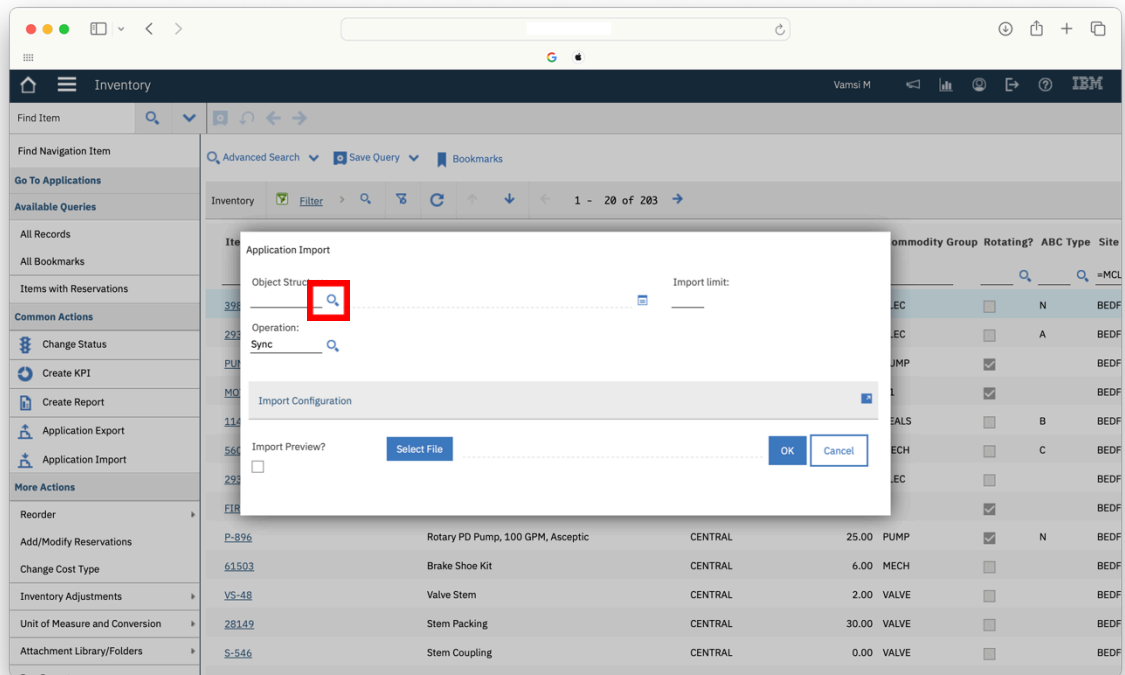
In Maximo, click on Application Import action below the Custom actions in the left side bar to import the updated .csv file which is downloaded from the application.



Item	Description	Storeroom	Current Balance	Commodity Group	Rotating?	ABC Type	Site
32882	Light Bulb, Fluorescent- 36 In Long	CENTRAL	50.00	ELEC	<input type="checkbox"/>	N	BEDF
29331	Building Thermostat	PKG	150.00	ELEC	<input type="checkbox"/>	A	BEDF
PUMP100	Centrifugal Pump 100 GPM, 60 FT-HD	CENTRAL	11.00	PUMP	<input checked="" type="checkbox"/>		BEDF
MOT10	Motor- 10hp/1750rpm/TEFC/254T Frame/440v/3ph/60hz	CENTRAL	108.00	01	<input checked="" type="checkbox"/>		BEDF
11453	Seal, Mechanical, Self Aligning- 1 In ID	MACHSHOP	70.00	SEALS	<input type="checkbox"/>	B	BEDF
560-00	Tubing, Copper-1 In ID X .030 In Wall	MACHSHOP	31.00	MECH	<input type="checkbox"/>	C	BEDF
29331	Building Thermostat	CENTRAL	25.00	ELEC	<input type="checkbox"/>		BEDF
FIRE-100	Fire Extinguisher	CENTRAL	0.00		<input checked="" type="checkbox"/>		BEDF
P-896	Rotary PD Pump, 100 GPM, Aseptic	CENTRAL	25.00	PUMP	<input checked="" type="checkbox"/>	N	BEDF
61503	Brake Shoe Kit	CENTRAL	6.00	MECH	<input type="checkbox"/>		BEDF
VS-48	Valve Stem	CENTRAL	2.00	VALVE	<input type="checkbox"/>		BEDF
28149	Stem Packing	CENTRAL	30.00	VALVE	<input type="checkbox"/>		BEDF
S-546	Stem Coupling	CENTRAL	0.00	VALVE	<input type="checkbox"/>		BEDF

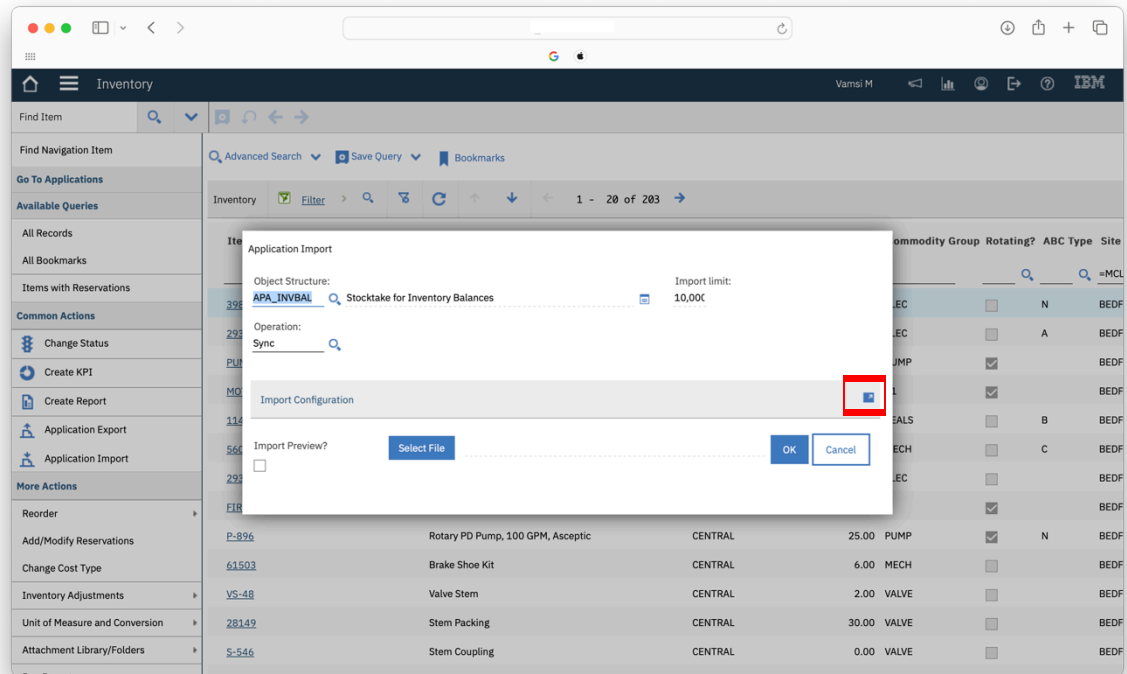
Step 22:

In the Application Import pop up, select the **APA_INVBAL** object structure by clicking the lookup icon.



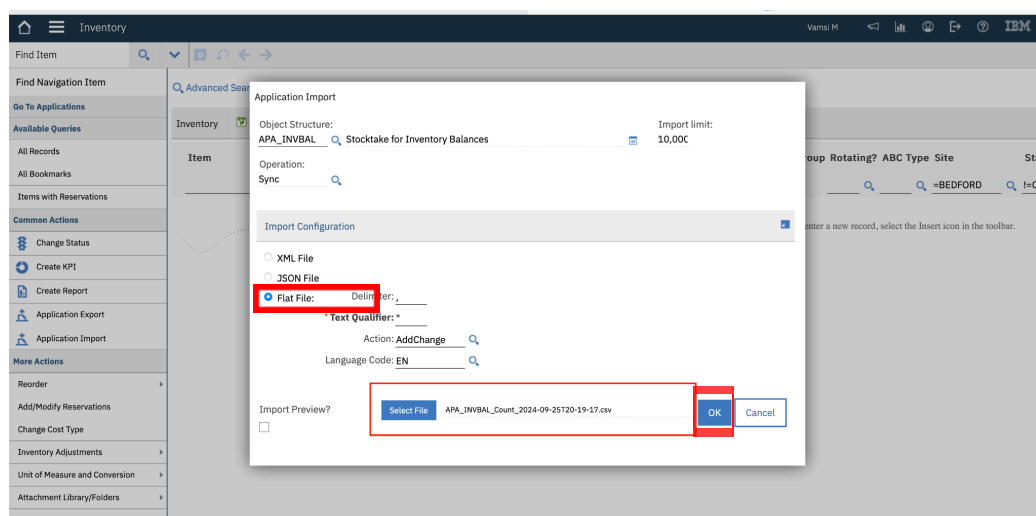
Step 23:

Click the expand icon in the Import configuration tile.



Step 24:

Select **Flat File** and then click on **Select File** button to select the file downloaded from the app. Then click ok to import the file.



Step 25:

A success message will be displayed.

