



Flexibility levels in Ultimo

The power of flexibility

 Live-link your assets and facilities.

ULTIMO



FLEXIBILITY LEVELS IN ULTIMO

With our 30+ years of experience, we have been able to develop high-quality out-of-the-box software. And because of our practical experience, we also know the power of flexibility. Being able to customise the standard software to your company processes just little bit better. That's where Ultimo shines.

Our product offer default includes the Ultimo Customization Tool, with which a trained application manager can positively influence the user experience, the hands-on tool time and the reliability of management information. All the while still offering you the benefits of new software features.

In our offer, we distinguish between two flexibility levels. In Ultimo Essentials and Ultimo Professional we offer flexibility level 'Standard', and in Ultimo Premium and Ultimo Enterprise we offer the level 'Supreme'.

Below you can find a summary of the possibilities 'Standard' offers and the additional possibilities 'Supreme' offers.

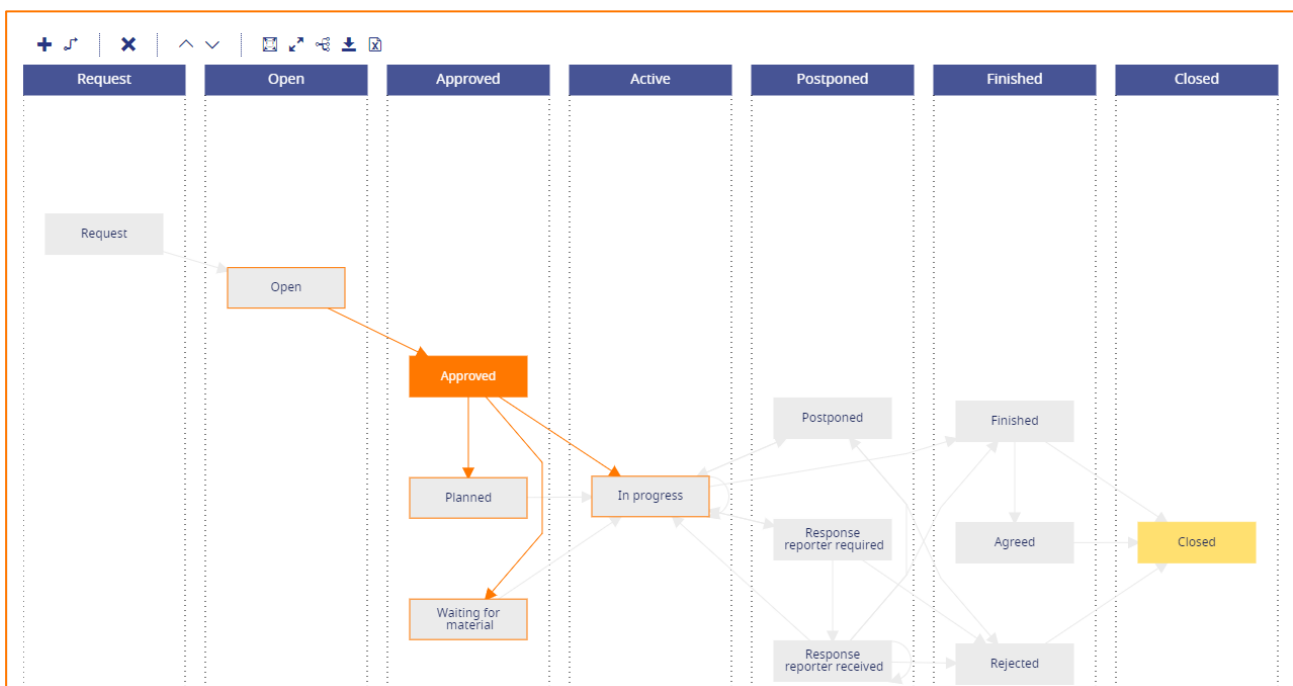
PROCESS SETUP

Standard

To set up a process, you can use progress statuses. Ultimo offers visual support with an intuitive graphic overview. In this overview, you can define every step in the process and adjust various settings. Who can initiate a next step in the process? You can authorise this per step by linking authorisation groups. Should a next step in the process not be reached before specific information has been filled in? By setting validation rules you can very easily enforce per progress status that the required information is always filled in.

Besides setting up all steps in the process, you can also set how Ultimo should behave during the process. By changing various process settings, you can set the paths Ultimo takes when performing various actions.

Be off to a flying start after setting up the process? You can accelerate this process by quickly entering large sets of data. From our own experience, Ultimo provides different data sets that can be added easily.

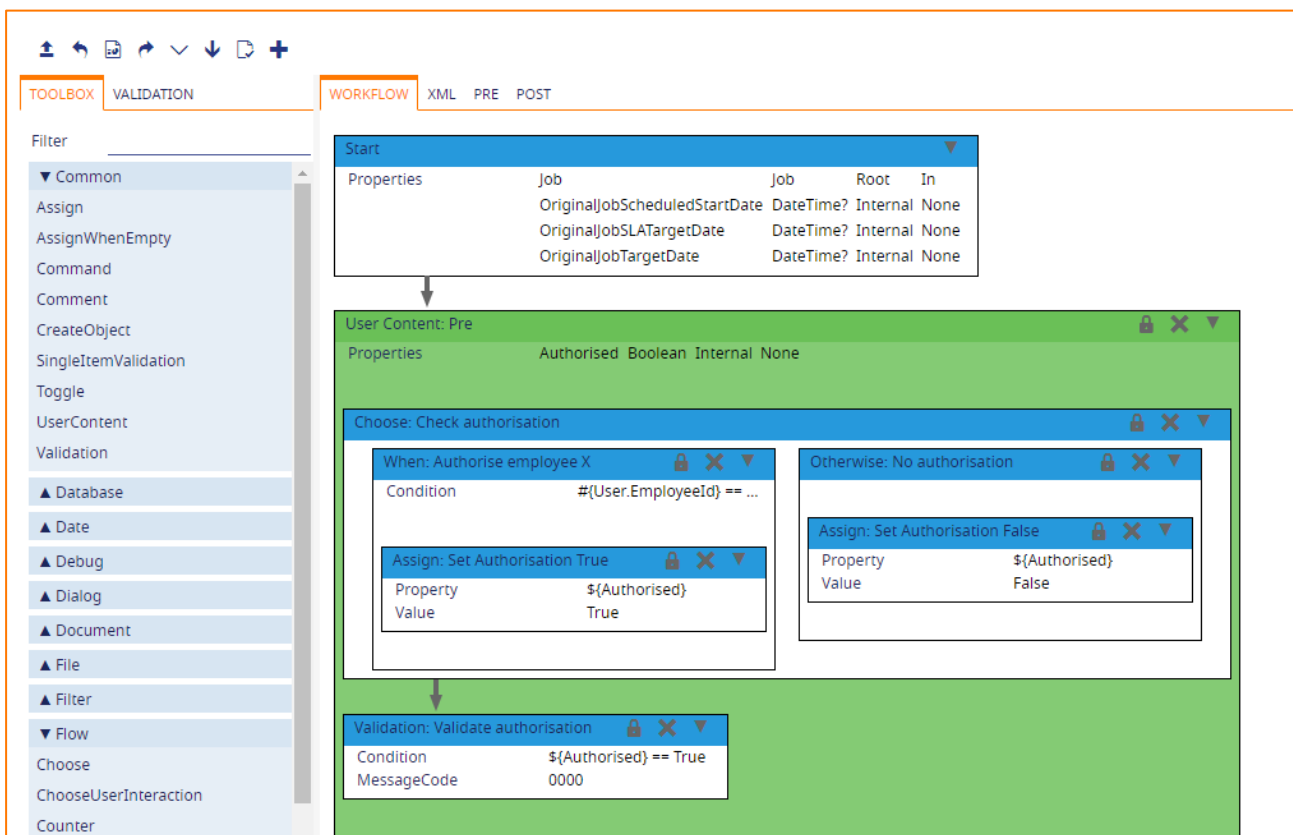


PROCESS SETUP

Supreme

To further customise a process, standard actions can be provided with additional logic. First ask the user when the chosen action should continue? With the Workflow Designer you can apply additional logic prior to and following standard actions. It is also possible to completely write your own logic for actions not included in the standard actions.

To guarantee the consistent entry of data during a process , or to support users in registering the right data, it is possible to create and set screen rules. This automatically enters or updates data while you input data.



SCREENS

Standard

To go through the set process, Ultimo provides an ample set of standard screens. The information in these screens has been carefully compiled on the basis of all the process knowledge we have gained in the past decades. However, every process is different and requires a more specific setup in certain areas. Does the screen contain information that is not relevant for the process? By disabling standard functionalities, this information is automatically removed from the screens, and the layout adjusts dynamically. Do you only want to change a specific field in a specific screen? By setting different field attributes, the presentation, visibility and order of fields can be changed in screens.

It can also happen that no standard input field is available for specific data in the process. This additional information can be entered by adding a checkbox or free input field to a screen.

The screenshot displays the 'Job' screen in the Ultimo software. The interface is divided into several sections:

- Top Bar:** Contains a search bar with 'EdtjobId' and 'EdtjobDescr' fields, and a dropdown menu for 'EdtjobEqmId'.
- Navigation Tabs:** Includes 'GENERAL', 'SLA', 'COMMUNICATION', 'INVISIBLE FIELDS', 'EXPLANATION', 'DOCUMENTATION', 'JOB PLANS', 'MATERIAL', 'EXTERNAL', and 'TOOL'. The 'GENERAL' tab is currently selected.
- GENERAL Tab:**
 - COST UNITS:** A list of fields including 'Process function' (EdtjobPrftd), 'Equipment' (EdtjobEqmId), 'Room' (EdtjobSpctd), 'Department' (EdtjobDepId), 'Cost centre' (EdtjobCcrId), 'Project' (EdtjobPrjId), and 'Site' (EdtjobSittId).
 - REPORT:** Fields for 'Reported by' (EdtjobReportFKEmpId) and 'Report date' (EdtjobReportDate).
 - Text Area:** A large text area labeled 'EdtjobReportText'.
- SETTINGS Panel:** A sidebar on the right with tabs 'SETTINGS', 'ACTION', and 'VIEW'. The 'SETTINGS' tab is active, showing various configuration options for the 'Job' screen:
 - Id:** EdtjobEqmId
 - Control type:** Selection
 - Relation name:** None
 - Label:** Equipment
 - Label width:** 160
 - Label right:**
 - Label right width:**
 - Sizing mode:** Default
 - Tab index:**
 - Visible:** ☒
 - Mandatory:** ☐
 - Protected:** ☐
 - Buttons:** 'Assign AET position' and 'Delete AET position'
 - Application element:**

SCREENS

Supreme

If you want to manage additional information and processes in Ultimo, you can create additional screens. You can then choose a place in the menu for the screens by making changes in the menu structure using the Menu Designer.

Added additional information or created a new process? You can add extra columns and references to additional information, or make a screen suitable for a new process using the expanded version of the Screen Designer. In this designer, it is also possible to change the layout of both new and existing screens.

The screenshot displays the Ultimo Screen Designer interface. On the left, the 'Relations' pane shows a tree structure of data entities, including Job, Change, CostCenter, Department, Document, Employee, Equipment, and others. Below this is a table with 110 items, showing columns for Name and Column. The central 'Layout tree' pane shows a hierarchical structure of the screen layout, including Gpb1 (Combined), Job (Selection), EdtJobId, and various containers and tabs. The main workspace shows the 'Job' screen layout with tabs for GENERAL, SLA, COMMUNICATION, INVISIBLE FIELDS, EXPLANATION, and DOCUMENTATION. The 'GENERAL' tab is active, displaying fields like Process function, Equipment, Room, Department, Cost centre, Project, and Site. The right-hand 'SETTINGS' pane shows configuration options for the selected field, including Id, Control type, Relation name, Label, Label width, Label right, Label right width, Sizing mode, Tab index, Visible, Mandatory, Protected, and Application element.

Name	Column
Id	JobId
AcceptedDate	jobaccepteddate
Accepted	jobaccepted

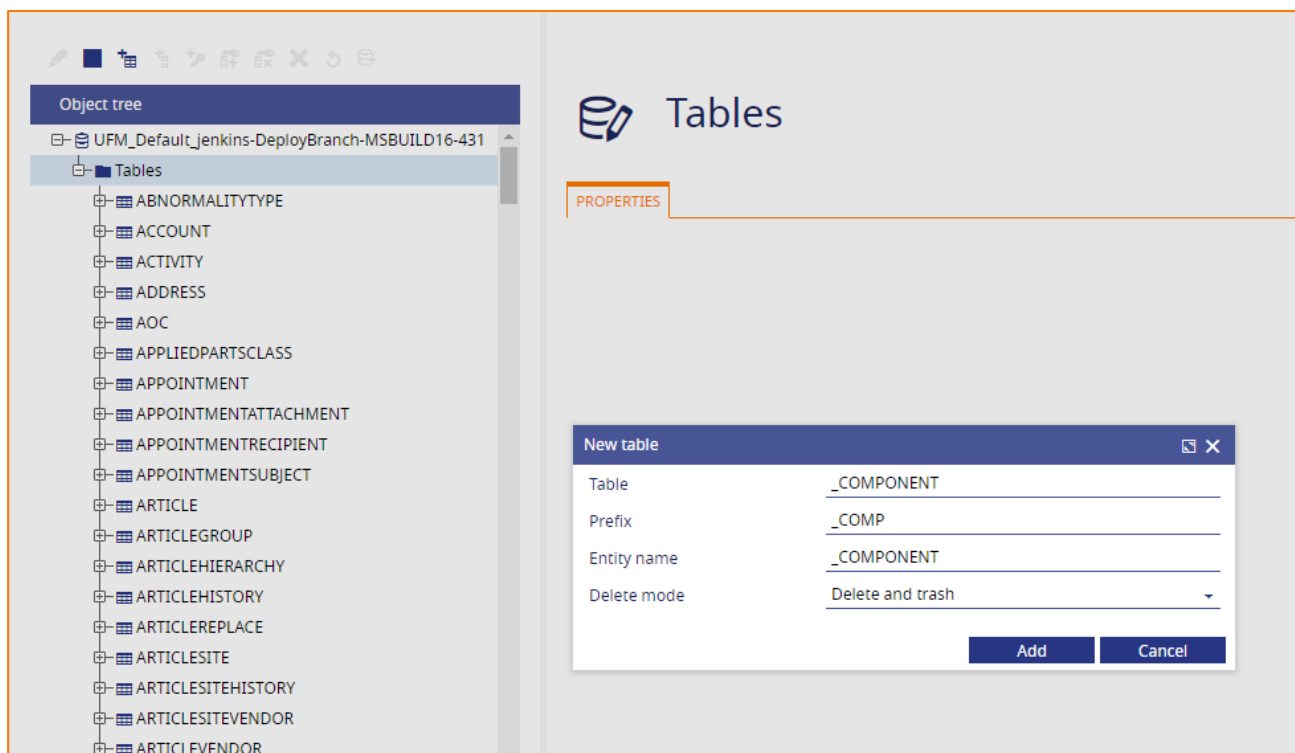
Field	Value
Id	EdtJobEqmId
Control type	Selection
Relation name	None
Label	Equipment
Label width	160
Label right	
Label right width	
Sizing mode	Default
Tab index	
Visible	<input checked="" type="checkbox"/>
Mandatory	<input type="checkbox"/>
Protected	<input type="checkbox"/>
Application element	

DATABASE MODEL

Supreme

Need to record additional data or master data? By expanding the database model it is possible to record additional information such as tables, relations and columns. This is all fully managed within our Customisation Tool.

It is also possible to define additional processes. A new process can be created and set up by adding contexts to tables.



SEARCH

Standard

Standard selection lists are available for you to easily find a record or search for a specific set of records. Prefer to filter on the basis of other data or change the column order? This can be applied immediately for everyone by changing selection list configurations. Does a user have their own preferences? Every user can customise their own selection list with personal selection lists. It is also possible to add and change explorers. Adding and setting up explorers makes navigating, finding and registering information easier.

The screenshot displays a software interface with a data table and a 'Prepare Jobs' dialog box. The table has columns: Code, Description, Execute by, Planned start date, Planned finish date, Reporter, and a date column. The 'Prepare Jobs' dialog box is open, showing a list of columns with their widths and visibility status. The dialog box has a title bar 'Prepare Jobs' and a close button. The columns listed are: Code (width 90, visible), Description (width 400, visible), Execute by (width 165, visible), Planned start date (width 145, visible), Planned finish date (width 145, visible), Reporter (width 165, visible), Report date (width 145, visible), Equipment code (width 110, visible), Department (width 220, visible), Cost centre code (width 90, visible), Cost centre (width 220, visible), Team (width 165, visible), Supplier (width 165, visible), Priority (width 110, visible), and Job type description (width 165, visible). The dialog box also has 'OK' and 'Cancel' buttons at the bottom right.

Column	Width	Visible
Code	90	✓
Description	400	✓
Execute by	165	✓
Planned start date	145	✓
Planned finish date	145	✓
Reporter	165	✓
Report date	145	✓
Equipment code	110	✓
Department	220	✓
Cost centre code	90	✓
Cost centre	220	✓
Team	165	✓
Supplier	165	✓
Priority	110	✓
Job type description	165	✓

SEARCH

Supreme

It is also possible to add and change explorers. Adding and setting up explorers can make navigating through, finding and registering information easier.

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Explorer design

1 - Organisation explorer

SITE: SitId, SitDescr

DEPARTMENT: DepId, DepDescr

PROCESSFUNCTION: PrfId, PrfDescr

EQUIPMENT: EqmId, EqmDescr

JOB: JobId, JobDescr, JobRecStatus

PMWORKORDER: PmwId, PmwDescr

EQUIPMENT: EqmId, EqmDescr

JOB: JobId, JobDescr, JobRecStatus

PMWORKORDER: PmwId, PmwDescr

JOB

1 - Organisation explorer

NODE

ROUTING

Root table	JOB
Foreign key	FKJOBEQMID
Part of relation	
View fields	JobId, JobDescr, JobRecStatus
SQL Where clause	
SQL Order by clause	JobRecStatus, JobId

AUTHORISATION

Standard

When the process is set up to your requirements, you can start thinking about the authorisation structure. Who has access to which screens? After users and user groups are created, you can assign authorisation per application component. Authorised to consult information but not authorised to enter new information or change existing information? By setting screen authorisations, you can specify what the options per screen are per user group. Need additional authorisation for a few specific users? Additional authorisation can be granted to a user by setting up and assigning additional authorisation groups.

**) Starting from Ultimo Professional, you have the option to choose data separation. Work in multiple sites in the same Ultimo environment without sharing operational data? With the additional module Record Authorisation, automatic data separation takes place in Ultimo.*

The screenshot displays the 'Technical Service' configuration page in the Ultimo application. On the left, the 'Application Element Tree' shows a hierarchical structure: Application > Common > Ultimo > Service desk > Technical Service. The 'Technical Service' element is selected and highlighted. The main panel on the right is titled 'Technical Service' with a subtitle 'Structure'. It features a tabbed interface with 'BASIC' selected, followed by 'SETTINGS', 'DEPENDENCIES', 'TABLES', and 'LICENCE'. The 'BASIC' tab contains the following configuration details:

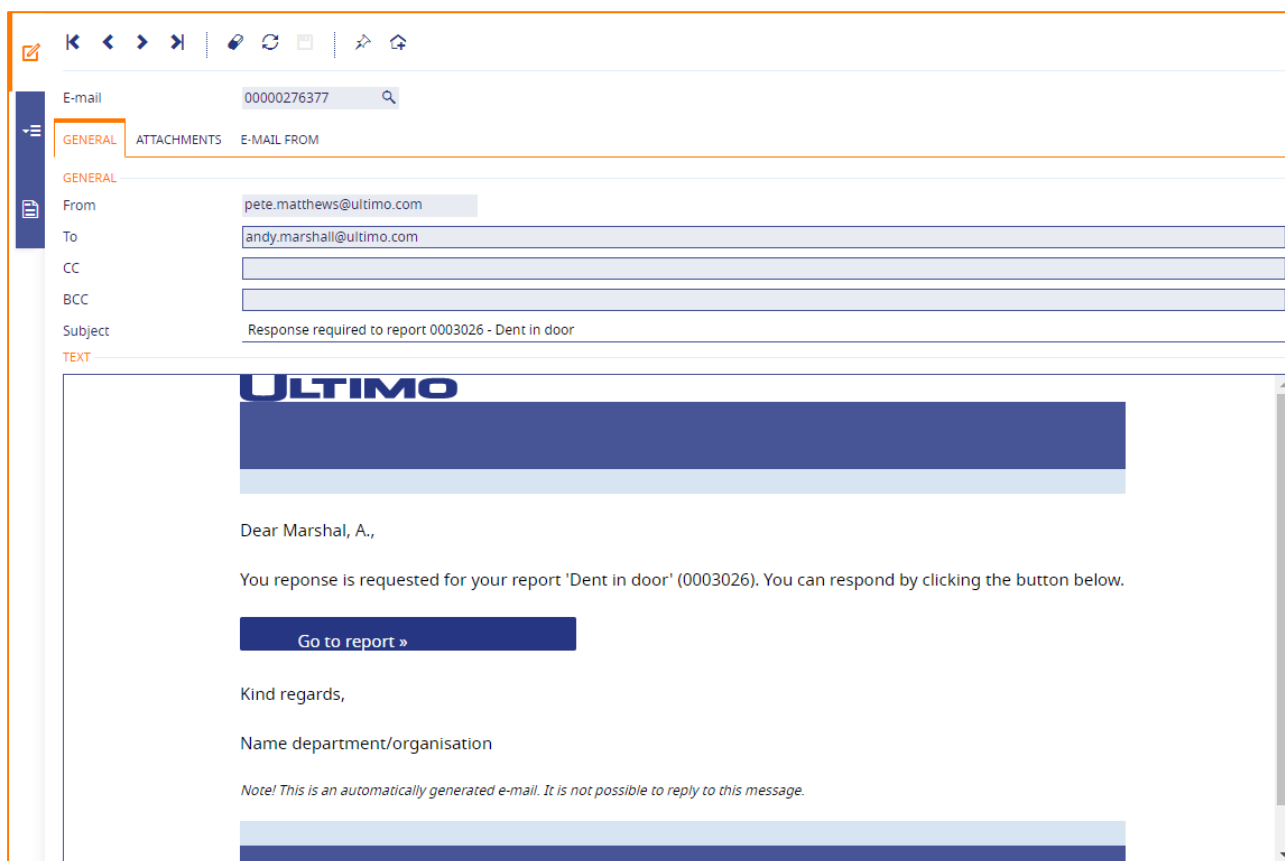
Field	Value
Guid application element	83672236-b01c-45ec-9a8f-32bc2b8db939
Type	Structure
Title	Technical Service
Icon	technicalservice
Authorisation	<input checked="" type="radio"/> Authorised

The 'Authorisation' field includes three radio button options: 'Inherited', 'Authorised' (which is selected), and 'Unauthorised'.

COMMUNICATION

Standard

You can use e-mail notifications to stay informed of the progress in the process. E-mail notifications are possible in all steps in the process by setting them up for progress status transitions. You can choose to send notifications to the reporter, the executing employee, the manager of the executing employee or any combination of these. You can decide the textual content of the e-mail by setting up e-mail templates.



AUTOMATIC PROCESSES

Supreme

With the Workflow Scheduler it is possible to execute actions automatically at periodic intervals. Besides setting the standard schedules, it is also possible to add additional workflow schedules. Did you use the Workflow Designer to add your own business logic that has to be executed periodically? No problem with Ultimo!

The screenshot displays the Ultimo Workflow Scheduler interface. On the left, a table lists various workflows with columns for 'Workflow name', 'Custom', 'Active', and 'Last checked'. The workflow '_CommunicateJobsToBeExecutedWeekly' is highlighted. On the right, the configuration panel for this workflow is shown, including tabs for 'BASIC', 'PROPERTIES', and 'SCHEDULE'. The 'SCHEDULE' tab is active, showing options for 'SCHEDULE TYPE' (Run once, Repeat by minutes, Recurrence pattern), 'RUN' (Start time: 08:00), 'RECURRENT PATTERN' (Weekly, Monday selected), and 'RANGE OF RECURRENCE' (From date: 01/01/2020, No end date).

Workflow name	Custom	Active	Last checked
Filter			
_CommunicateJobsToBeExecutedWeekly	✓	✓	06/07/2020 14:00
Currency_GetCurrentExchangeRates			
Document_CheckIfDocumentsExist			
Document_ReimportCadDocumentsChangedSinceLastImp...			
Equipment_ApplyIndexPercentageUsingEvent			
Equipment_VehicleInspectionExpirationMailToCustomer			
Humble_ImportUnitsAndElementsAndDefectsAndActivities			
InternalChargeCreate_ApproveEvent			
InternalChargeCreate_ProposeEvent			
Job_ConvertDurationFromDaysToHoursEvent			
MaintenancePart_ImportActivitiesFromHumbleUsingEvent			
MaintenancePart_ImportDefectsFromHumbleUsingEvent			
MaintenancePart_ImportFromHumbleUsingEvent			
PmWorkOrder_SendAutomaticPmResultEmail			14/12/2016 10:30
ServiceLevelAgreement_Job_OnAmountPercentConsumed...			14/12/2016 10:45
ServiceLevelAgreement_Job_OnAmountPercentConsumed...			14/12/2016 10:45
ServiceLevelAgreement_Job_OnAmountPercentConsumed...			10/07/2017 11:55

_CommunicateJobsToBeExecutedWeekly
Send weekly email to employees

SCHEDULE

SCHEDULE TYPE

☐ Run once

☐ Repeat by minutes

☒ Recurrence pattern

RUN

Start time: 08:00

RECURRENT PATTERN

☐ Daily

☒ Weekly

☐ Monthly

Recurs every: 1 week(s) back on:

☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

RANGE OF RECURRENCE

From date: 01/01/2020

☐ Number of recurrences: 1

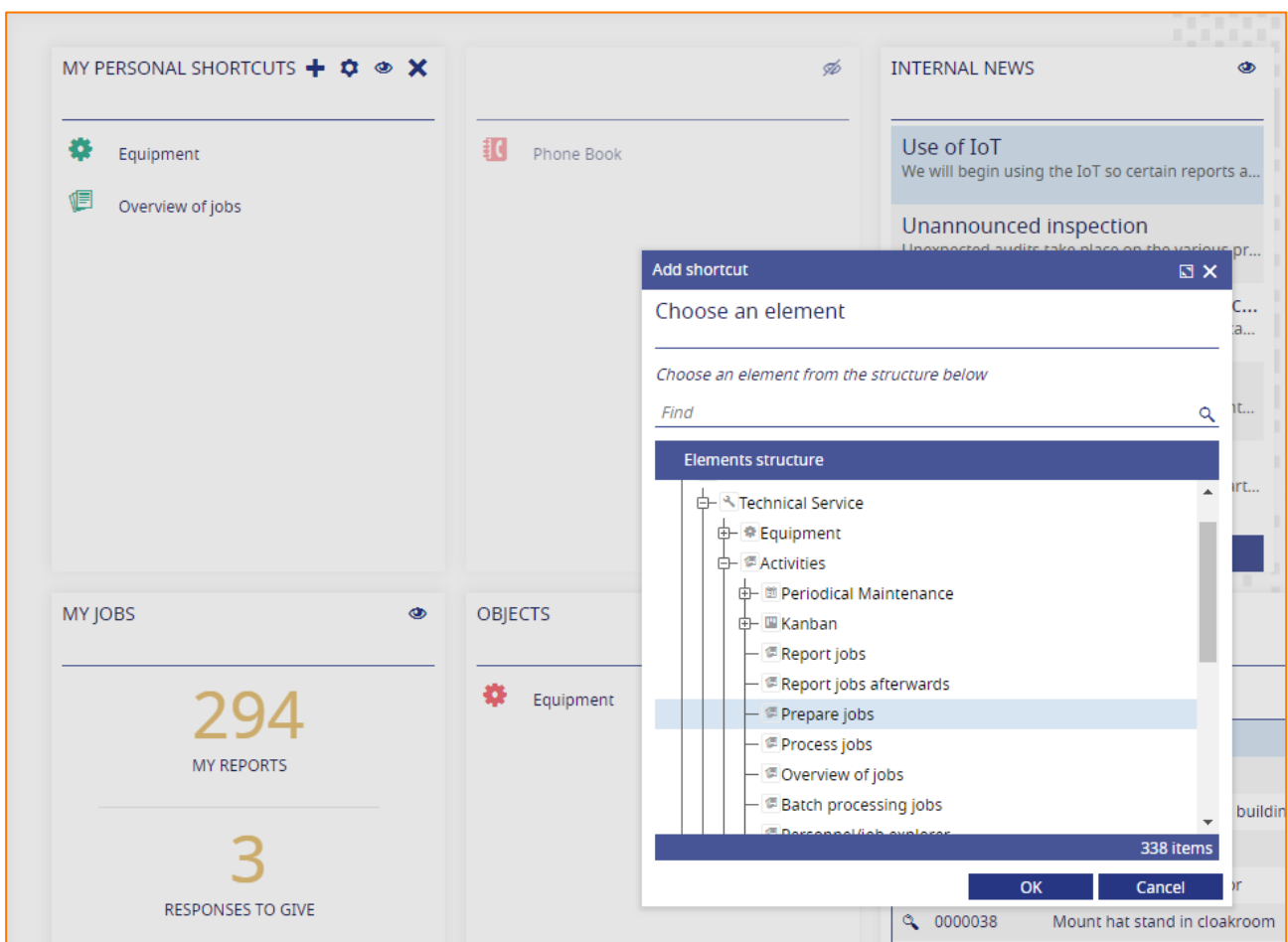
☐ End date

☒ No end date

DASHBOARDS

Standard

A standard set of dashboards and reports is available to monitor the process. These can be tailored to your organization needs. Every user has the option to add personal shortcuts to the dashboard to navigate swiftly to frequently used screens. When the standard set of items is not applicable for everyone each user has the ability to personalize the dashboard entirely to its own needs.



DASHBOARDS

Supreme

It is possible to create additional elements to set up dashboards. Add additional counters or grids to the dashboard for quick insight into actions to process? By setting up grid widgets, you can both change existing definitions and create new definitions. Additionally, it is possible for charts on the dashboard to change settings, like the period for which the information is shown.

Id	Description
<i>Filter</i>	<i>Filter</i>
MyCateringResourcesReservations	My catering/resources reservations
MyCommonServiceRequests	My common service requests
MyDeliveries	My deliveries
MyEvents	My events
MyHSEIncidentReports	My HSE incident reports
MyJobsToBeProcessed	My jobs to be processed
MyJobsWithCustomerSatisfactionRequested	My jobs for which a customer satisfaction is requested
MyJobsWithResponseRequested	My jobs for which a reaction is requested
MyOpenActionItems	My open action items
MyPoolCarReservations	My pool car reservations
MyReportings	My reportings

MYJOBSTOBEPROCESSED

My jobs to be processed

BASIC

COLUMNS

BUTTONS

DEFINITION

Id

MyJobsToBeProcessed

Description

My jobs to be processed

1 SELECT distinct(j.JobId), j.JobDescr, p.PrsDescr, j.JobSchStartDate

2 FROM dba.Job AS j

3 LEFT OUTER JOIN dba.ProgressStatus AS p ON JobPrsId = PrsId

4 LEFT OUTER JOIN dba.JobSchedulePart AS JobSp ON JobId = JobspJobId

5 WHERE j.JobContext <> 1024

6 AND (JobEmpId = {USERID} OR JobspEmpId = {USERID})



7 AND j.JobRecStatus IN (1, 2, 4, 8, 8192)

8 ORDER BY j.JobSchStartDate ASC, j.JobId ASC


REPORTS

Standard

Ultimo offers different types of reporting options. In the menu, you can request various standard reports. It is also possible for every user to compile their own reports. In the selection list this can be done with a one-off export to PDF or Excel. In the screen it is also possible for the user to easily compile list reports. A very flexible and powerful tool for every authorised Ultimo user. These reports can be downloaded with the current data at any time and can be shared with other users.

Equipment - End of warranty



Filter criteria:
End of warranty: not empty

Code	Equipment	End of warranty	Manufacturer	Department	Site

Print date: 10/07/2020 09:42

Page: 1 of #

PROPERTIES

Column header	End of warranty
Technical column name	EqmWarrentDate
Column width	115
Sorting order	Ascending

Ultimo has various Kanban boards in the application to schedule work quickly and pragmatically as a team, and to change the progress by dragging and dropping cards. Would you rather show different information on a Kanban board/card, change the look & feel or use the Kanban for another process? With Kanban templates, it is possible to change the behaviour of existing Kanban boards and define entirely new templates for other processes.

+ ✕ ↶

Name	Custom
Change - Management of Change	
Job - Action	
Job - Building	
Job - Cleaning	
Job - Fleet	
Job - Infra	
Job - IT Incident	
Job - IT ServiceRequest	
Job - Itil Change	
Job - Medical Technology	
Job - Technical Service	
MeetingTopic - Shift Handover	
SafetyIncident - Standard	

Job - Action

BASIC
STATUS
CARD
BOARD ACTION
DEFINITION

Title: \${Item.Id} - \${Item.Description}

Description: #if(\${Item.Change})!=Empty#contextdescription_capital(CHANGE 1)
\${Item.Change.Id} - \${Item.Change.Description}

Content: \${Item.Employee.Description?}

Image source: \${Item.Employee.ImageFile?}

Image text: \${Item.Employee.Description?}

Colour condition: \${Item.TargetDate} != Empty && #{Environment.CurrentDateTime} > #addmi

FLEXIBILITY AND UPDATES



We use continuous integration and continuous delivery to deliver to our customers. This enables software development teams to focus on meeting business requirements, code quality and security because all deployment steps are automated.

We provide weekly or even more frequent updates. In case of important new functionalities, all end users will be informed when starting the software through a "New in Ultimo" dialog box. If an update has significant impact, you can manage the moment of deployment through Feature Toggles.



GETTING STARTED?

Interested? Let us tell you more.

Together with our partners, we help you to make the most of Ultimo and your processes. Benefit from all the know-how we have gathered during thousands of implementations since 1988. Interested in the possibilities? Request a free demo of our software with this link: [Request a demo.](#)





SEE VITAL SIGNS. TAKE VITAL ACTION.

Ultimo is the #1 EAM Cloud platform that provides its customers with control over their assets and an unmatched and proven Return On Investment. Its benefits include increased uptime; management of costs and an extension in the lifespan of equipment; reliable control information; ease of adherence to laws and regulations and the assurance of a safe working environment. With Ultimo you see vital signs and you take vital actions.

Live-link your assets and facilities.

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