Indian Affairs, Division of Facilities Management and Construction

Indian Affairs-Facility Management System (IA-FMS) Training

IA-FMS (Maximo) Navigation
Lesson goals

• This lesson will cover the following specifics within IA-FMS:
  • Logging into the system
  • Understanding user profile settings
  • Understanding the user interface and screen elements
  • Navigating within the system
  • Querying and searching for data
  • Attached Documents
  • Bookmarks
IA-FMS Overview

IA-FMS - Integration Points
Logging into IA-FMS (Maximo)

Hyperlink to BIA Intranet Maximo BIA User Login for PRODUCTION: https://maximo.bia.gov/maximo/
1. ‘Menu’ bar.
2. ‘Favorite Applications’.
3. ‘Quick Insert’.
4. ‘Bulletin Board’.
5. Result Set (or filter).
6. ‘KPI (Key Performance Indicator) Graph’.
7. ‘KPI List’.

IA-FMS - Navigation
1. Select ‘Profile’.
2. Select ‘Default Information’.

3. Select ‘Default Insert Site’.
4. Select ‘Storeroom Site’.
5. Select ‘Default Storeroom’.
1. This lets the User know what application they are currently using.
2. This field stores/displays the list of ‘Saved Queries’.
3. ‘Find’ field. The user inserts the exact record ID to display a record.
4. ‘Select Action’ list. This displays additional actions a user can perform to a record.
5. ‘Tool Bar’ icons. These are short cuts to performing actions on a record.
6. ‘Navigation Bar’. These values are always displayed.
7. Additional ‘Tabs’. These display additional values related to the current record.
8. ‘Advanced Search’ a more in depth searching tool.
9. ‘Saved Query’. Users can store queries they have created.
10. ‘Bookmarks’ allow the user to create a direct link to an individual record.
## The Toolbar

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Access Saved Queries</td>
</tr>
<tr>
<td>- Find a Specific Record</td>
</tr>
<tr>
<td>- Use the Select Action Menu</td>
</tr>
<tr>
<td>- Insert New Record</td>
</tr>
<tr>
<td>- Save Record</td>
</tr>
<tr>
<td>- Clear Information</td>
</tr>
<tr>
<td>- View Previous / Next Record</td>
</tr>
<tr>
<td>- Change Record Status</td>
</tr>
<tr>
<td>- Initiates Workflow process.</td>
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</table>

**IA-FMS - Navigation**
Application Tabs and Subtabs

1. Main ‘Tabs’.
2. ‘Sub-tabs’
1. To expand a Table window click on the ‘blue’ triangle to view additional information about the record.
2. After expanding the table the triangle will turn orange and face down. Click on the triangle again return to the original format.
1. Data Entry fields – Fields that can be edited.
2. Default Values – Values that are inserted automatically when the record is created.
3. Required fields (*). You cannot save the record until these fields are populated.
4. Calculated fields. These are calculated values and cannot be edited.
5. Read-Only fields.
1. ‘Select Value’ displays a list of selectable data items.

IA-FMS - Navigation
Field Assistant Buttons

1. ‘Long Description’ icon. Displays the hidden long description dialog box.
1. ‘Select Date’ icon displays a Select Date window containing a calendar.
1. Detail Menu Button displays a drop-down menu of options for sources of data.
Navigating Between Applications

This example is used to show how to navigate to the ‘IA Deferred Maintenance Tracking’ app (from the ‘Start Center’).

1. Select ‘Go To’.
2. Select ‘Work Orders’.
3. Select ‘IA Deferred Maintenance Tracking’.
1. The Filter icon allows a user to search a list if values using words or numbers.
1. Upon selecting ‘Go To IA Locations’ the user will be taken to that application.
2. After selecting a record in the ‘IA Locations’ app. The user will select ‘Return with Value’. This will return the selected value back to the ‘Maximo ID’ field.
3. If the user does not find the value they are looking for then the user would select ‘Return’. This will take the user back to the ‘Maximo ID’ field with no value.
1. Click on the word ‘Help’

2. The ‘Help’ support is based on the application the user is currently in. If the user was working in the ‘IA Deferred Maintenance Tracking’ app. Then the ‘Help’ will reflect this application.
Maximo Asset Management > Modules and applications > Work Orders module

Work Order Tracking application

In the Work Order Tracking application, you create and manage work orders for assets and locations. A work order specifies a particular task, and the labor, materials, services, and tools needed to complete the task.

When you create a work order, you initiate the maintenance management process and create a historical record of the work requested and performed.

You can create work orders in applications other than Work Order Tracking. These applications include the Changes application, Condition Monitoring application, Incidents application, Preventive Maintenance application, Problems application, Quick Reporting application, Releases application, and Service Requests application.

Work orders overview
A work order specifies a particular task and the labor, materials, services, and tools required to complete the task.

Working with work orders
Work orders initiate the maintenance process and create a historical record of the work that is performed.

Related concepts:
- Working remotely with Maximo Everyplace

Feedback
In Order to look up information about a particular field simply place the cursor in the field and select the keys ‘ALT-F1’ at the same time. This will display the database table and column information plus any description concerning the purpose of the field.
1. Every application in IA-FMS opens up with a ‘List’ tab. This is the first screen you will see when you access any application.

2. All the fields boxed in **RED** are searchable (this applies to the ‘List’ tab Only). If the user wants to retrieve all available records then the user should place their cursor in the first box (in this case is would be the ‘Asset’ field) and hit Enter on your keyboard. This will retrieve all the records you currently have access to in that application.
1. In the upper left corner on the ‘List’ tab of every application is the ‘Advanced Search’ option. After clicking on the word ‘Advanced Search’ a pop up will appear.

2. This pop-up provides additional fields the user can use to narrow down the search by adding greater detail to the search information.
Search Operators and Wildcards

These operators can be used in all ‘Searchable’ fields in IA-FMS:

- Equal ( = ) finds only records that match that word or number exactly
- Greater Than ( > ) finds records greater than the number
- Less Than ( < ) finds records less than the number
- NULL values are found using ~null~
- Any value that is not NULL are found using !~null~
- Underscore ( _ ) substitutes for a single character.
- Percent sign ( % ) substitutes for a string of characters
1. Once a user has performed a search for records and decides to save the search it can be saved for future use by creating a ‘Saved Query’
2. To save a query select ‘Saved Query’.
1. Enter a query name in the ‘Query Name’ field
2. Enter that same name in the query ‘Description’ field
3. If you check the box ‘Public?’ then all users who log into IA-FMS will be able to use the query.
4. If you check ‘Default?’ the every time you view data in this application it will reflect only the records found by this query (not a good idea).
5. If you leave both boxes unchecked then you will be the only one to see and use this query.
6. Click ‘OK’ when you are finished.
Attachments allow users to attach a document such as a PDF, JPEG, Work Doc. as well as web pages to an individual record.

1. Click on the ‘Attachments’ icon. This will usually be in the upper right corner of the screen.

2. Select ‘Add New File’ to add a new record.
Attached Documents – Adding a Document

1. Select a Folder.
2. Specify a File.
3. Name the Document.
4. Click ‘OK’.

IA-FMS - Navigation
1. Click on the word ‘Attachments’
2. The menu below will appear. Then select the record you would like to view.
‘Bookmarks’ allow a user to mark a record they may need to access on a regular basis. Records that are ‘Bookmarked’ are only view by the user. No one else can see a users ‘Bookmarked’ records.

1. To ‘Bookmark’ a record simple click on the ‘Bookmark’ icon associated with the record.
1. To view a ‘Bookmark’ click on the term ‘Bookmarks’.
2. Select the record ID (in this case ‘Asset’) and IA-FMS will take the user to that record.
3. To remove a ‘Bookmark’ record just click on the disposal icon and the ‘Bookmark’ will be removed from the view. The record will still be in IA-FMS but will not display on the user’s list of ‘Bookmarked’ records.
Demo

Maximo Navigation