Maximo 7.0 User Guide
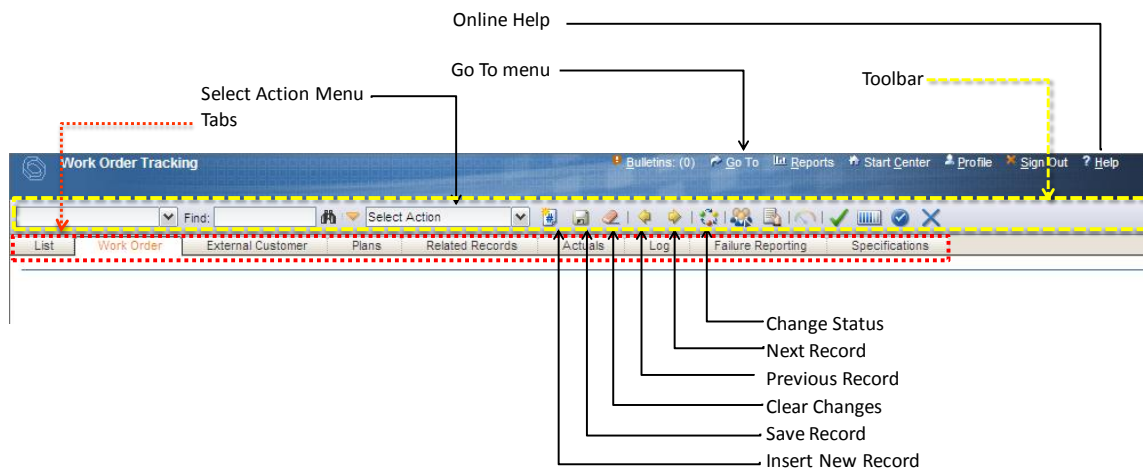# Maximo Basics

Maximo Basics Volume

Introduction to Maximo

Online Help

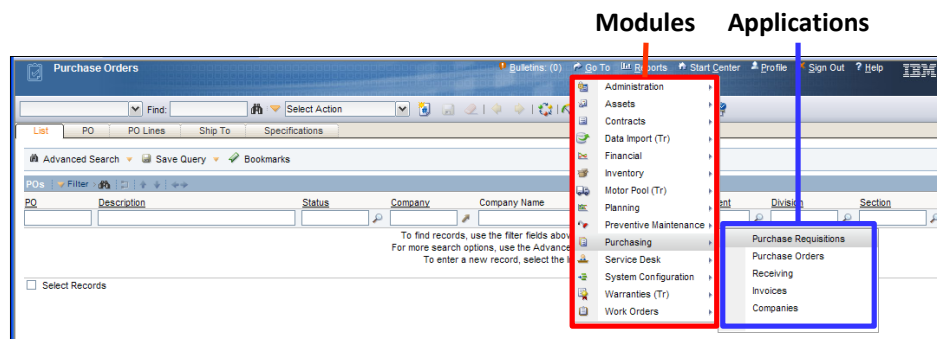Need help? Click the Help icon in the upper right-hand corner of your screen. This will open application-specific help.

Maximo Navigation Basics: User Interface map

Maximo Modules versus Applications

In Maximo 7, the modules and applications are accessed from the Go To menu. Modules are a categorized grouping of work. Applications are where you actually perform tasks.


For example, in the Purchasing **module**, there are the following applications:

- Purchase Requisitions
- Purchase Orders
- Receiving
- Invoices
- Companies

Select Action Menu

Each application has a customized Select Action menu. For example, in the Work Order application, there is a Select Action menu action for Apply Route, but this action doesn't exist in the Purchase Requisition application.
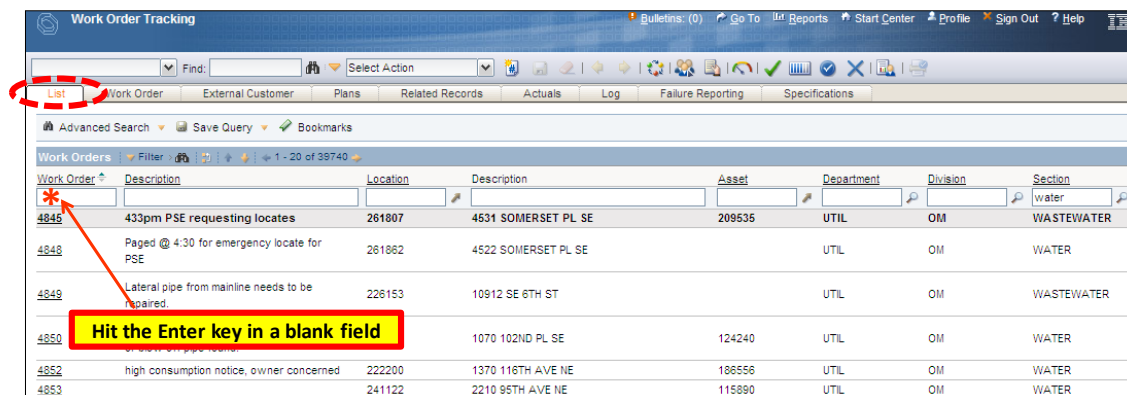
You often have the option of using icons on the toolbar as a shortcut to the Select Action menu. See the example below of changing the status of a work order.
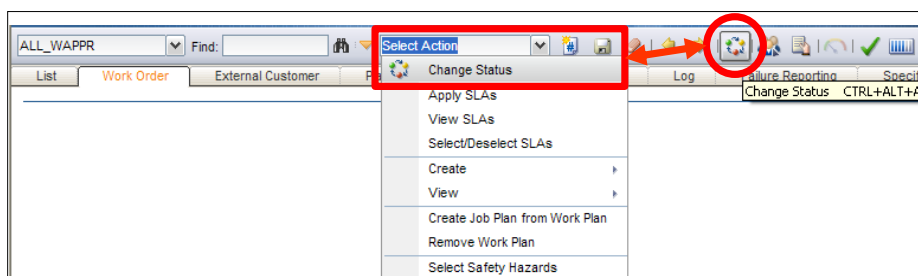
List tab

When you first open an application, you arrive at the List tab. You can use the List tab to locate and select records. You can also use the List tab to bookmark records for later use. See the *Bookmarks* section later in this guide for more information about bookmarking records.

If you hit the Enter key in a blank field in the List tab, it will open up all active records. In the section below, we discuss how to refine your searches for records.

Introduction to Maximo

Navigation in the List tab

When the records are displayed in the List tab, you can navigate between the records using the direction arrow keys.

- To open a record, click the underlined Record ID.
- Click Next Row ⬆ and Previous Row ⬇ to move up and down rows of the result set.
- Click Next Page ➡ and Previous Page ⬅ to navigate to other pages of the result set.

Advanced Search

To search for a record:

1. From the List tab, click 🔍 Advanced Search. The system displays the More Search Fields dialog box.

2. Enter or select a value for the fields you want to use in the search.

Click one of the following buttons:

3. Click **Find** to perform the search. The system displays the search results in the List tab table window.

4. Click **Restore Application Defaults** to clear the fields you've added. This allows you to restart entering in your advanced search criteria.

5. Click **Cancel** to return to the List tab without performing a search.

Queries and Searching

Using filter fields

When you open an application, you are usually looking for a particular record.
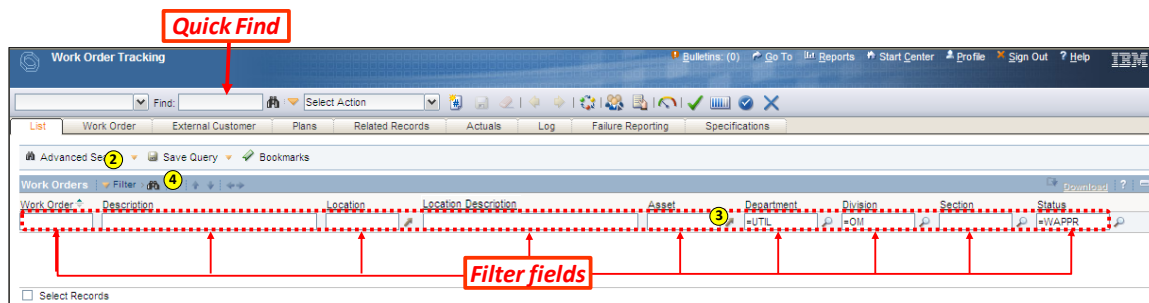
To look for a row or record that contains a particular value:

1. Open the application you want to work within.

2. If the filter is not already open, click ▶ Filter to open the filter field.

3. Enter a value in one or more of the filter fields (see instructions on search criteria below for wild cards).

4. Click Filter Table 🔍.

    OR

    Hit the Enter key.

5. Search results are displayed based on your criteria.

6. If there are no records that match your filter criteria, a message displays in the center of the table window: ...No rows to display…

7. To clear the filters and begin a new search, click the Clear Filter Fields 🔳 icon.

NOTE: The Clear Filter Fields icon is only active (is no longer grayed out) when a table has been filtered.

Save Query

If you want to reuse this advanced search filter (i.e. find records at a later time using the same search criteria), you can save it as a query record.
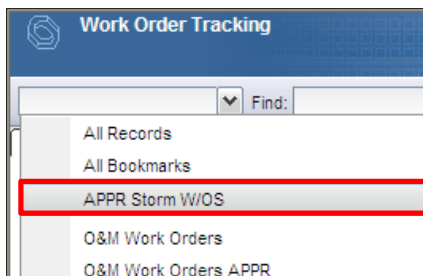
To save a query,

1. Perform a search in the filter (such as the above example).

2. Click the Save Query icon on the toolbar.

3. The Save Current Query dialog box opens.

4. Enter a name in the **Query Name** field, and enter a description in the next field.

    NOTE: If this query is to be public, make sure to give the query a clear and understandable name.

5. Do you want this query to be available to all Maximo users? If so, click the **Public?** checkbox.

6. Do you want this query to be the default query in your Start Center? If so, click the **Default?** Button.

7. Click OK.

8. The query is now included in the list available in the left hand drop-down menu for records queries.

View/Manage Queries

You use the View/Manage Queries dialog box to perform the following:

- Select a query to perform a search
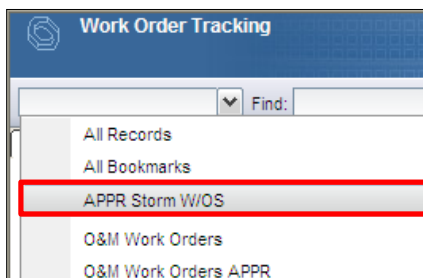- Modify a query
- Delete a query

To select a query to perform a search:

From the View/Manage Queries dialog box:

1. From the List tab, ⬛ in the Save Query drop-down menu, select **View/Manage Queries**. The system displays the View/Manage Queries dialog box.

2. Click the underlined query name in the Query Name column of the table window. The system displays the search results on the List tab.

From the records drop-down menu:

1. From the records drop-down menu, click the query you want to run.

2. The system displays the search results on the List tab.

To modify a query:

1. From the List tab, ⬛ in the Save Query drop-down menu, select **View/Manage Queries**. The system displays the View/Manage Queries dialog box.

   You can edit the following fields:

- Description
- Default? checkbox
- Public? checkbox

   NOTE: You are able to edit the SQL WHERE clause in the details section.

2. After making the changes, click OK to update the query and return to the list tab.

To delete a query:

1. From the List tab, ☐ in the Save Query drop-down menu, select View**/Manage Queries**. The system displays the View/Manage Queries dialog box.

2. Click Mark Row for Delete 🗑 in the View/Manage Queries table window row containing the query you want to delete. The system marks the row for deletion. NOTE: If you decide that you do not want to mark this query for deletion, click Undo Delete 🗑.
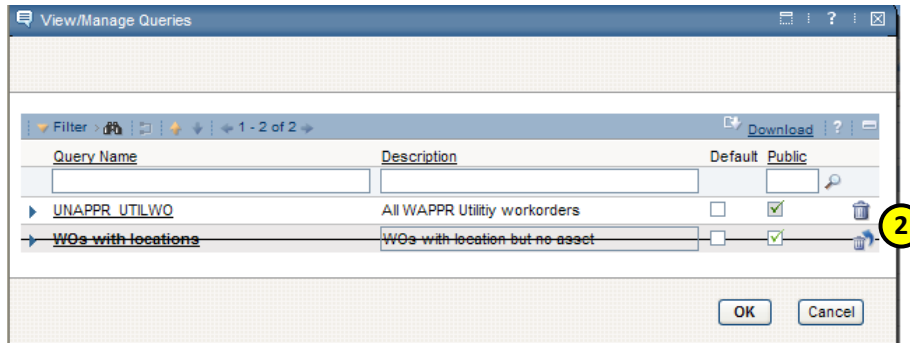
3. Click one of the following buttons:

4. Click **OK** to delete the query and return to the List tab.

5. Click **Cancel** to return to the List tab without deleting the query.

Select multiple records to perform batch actions

NOTE: To select multiple records, the total result set must be less than 200 rows.
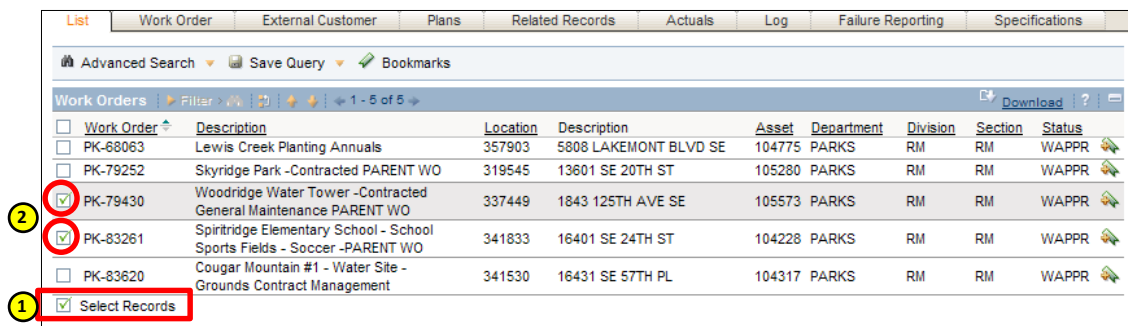
1. Select the **Select Records** check box at the bottom of the List tab table window.

2. Select the **Select Row** check box for each record on which you want to perform the action.

Bookmarks

You can bookmark a record to quickly access it later via the My Bookmarks dialog box. The Maximo Bookmark function is the same as an Internet browser "bookmark" or "favorites" function. If you want to return to an individual record at some future time, you can "bookmark" it so that the record will be included in the bookmark list.

You access a bookmark within the application; for example, in the Work Order Tracking application, you can bookmark word order records.

Add Bookmark

There are two ways to add a record to your Bookmarks list: using the List tab, or using the Select Action menu within the record itself.

To add a bookmark via the List tab:

1. From the List tab, on the far-right hand side of a row, click the Add to Bookmarks 🔖 icon.

2. The system adds the record to the My Bookmarks dialog box, and the blue message area reads "Record has been bookmarked."

**To add a bookmark via the Select Action Menu:**

1. Display the record that you want to bookmark.

2. From the Select Action menu, select Add to Bookmarks. The system adds the record to the My Bookmarks dialog box.

Use Bookmarks

You use the My Bookmarks dialog box to retrieve a bookmarked record. You also use it when you want to remove a bookmark from your list. **NOTE**: The My Bookmarks dialog box includes every single record you've bookmarked, independent of when you added them.

Retrieve a bookmarked record:
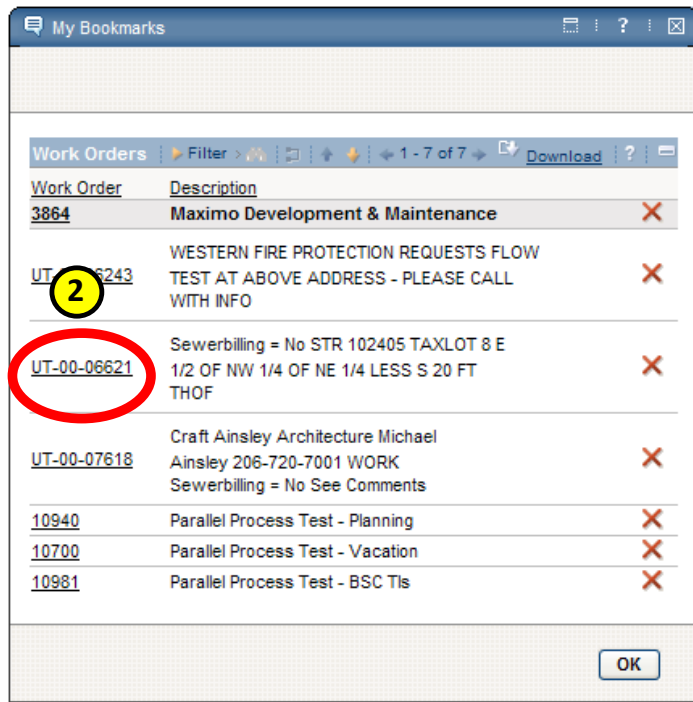
1. From the List tab, click the **Bookmarks**.
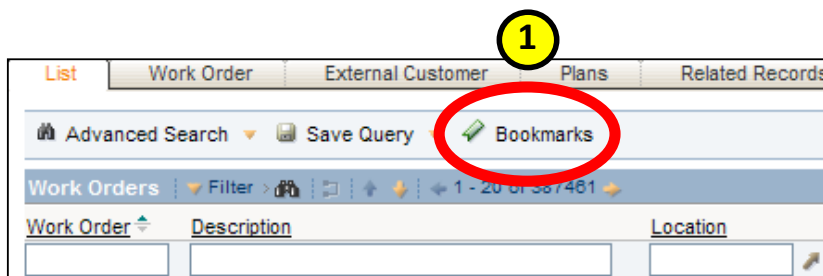
2. The system displays the My Bookmarks dialog box containing your bookmarked records for this application.

3. Click on the underlined record number (left-hand column) to retrieve a bookmarked record.

4. The record opens in the application tab.

Delete a bookmark:

1. From the List tab, click **Bookmarks**. The system displays the My Bookmarks dialog box containing records bookmarked for this application.

2. Click Delete ✕ in the row containing the bookmark you want to delete (right-hand column).

3. The system displays a dialog box that states, "Are you sure you want to delete this bookmark?".

4. Click **Yes**. The system deletes the bookmark from the table window.

   NOTE: Unlike other functions, the My Bookmarks dialog box does not cross out the record with a line; clicking Yes removes the record with no further notice.

5. To close the dialog box and return to the application, click **OK.** The system returns to the List tab.

Start Center

The Maximo Start Center is your door to all Maximo applications. It is the first screen you see after you log in.

You can personalize your Start Center with links to applications you use frequently. You can also set up buttons that will quickly insert new records such as work orders, service request tickets, purchase requisitions, etc. with the click of one button. The Start Center Inbox/Assignments window is used for purchase requisition and

Favorite Applications window

1. In Favorite Applications, you are able to set up a hyperlink to applications you frequently use. To add an application to the Favorite Applications window,

2. Click the Edit Portlet icon (pencil icon on the gray window bar).
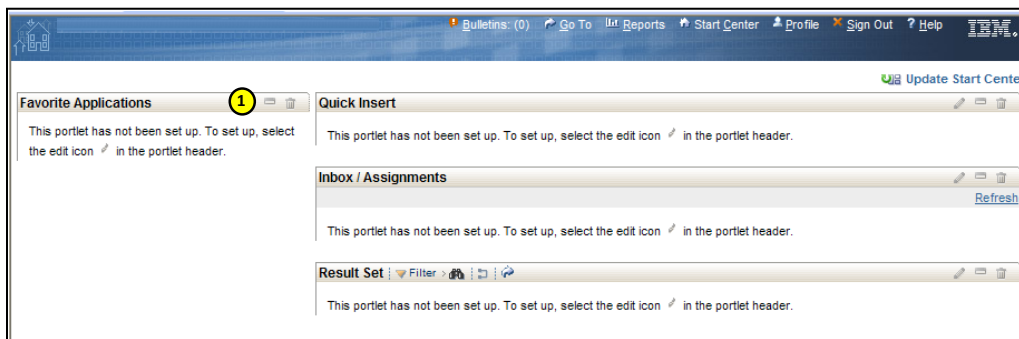
3. Click the Select Applications button. The Select Applications window opens.
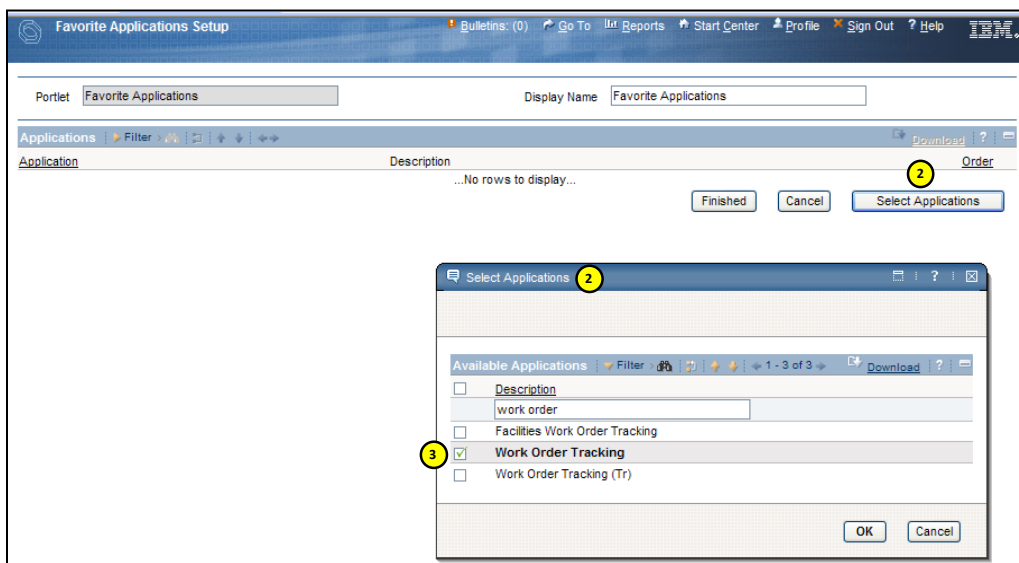
4. Check the box beside the application you are adding, then click OK.

5. To add more applications, repeat steps 2 through 4 above until you are finished.

6. You can specify what order you want the applications to appear. To specify a sequence, enter an order number in the Order column. Applications that do not have an Order number are arranged alphabetically.

7. Click the Finished button.

8. When you return to the Start Center screen, your favorite applications will be listed.

Quick Insert

In Quick Insert, you are able to set up a link to create a new record in a specific application. This is helpful if you repeatedly create records such as service request tickets or work orders.

1. To add a link to the Quick Insert window:

2. Click the Edit Portlet icon on the gray window bar.

3. Click the Select Actions button. The Select Actions window opens.
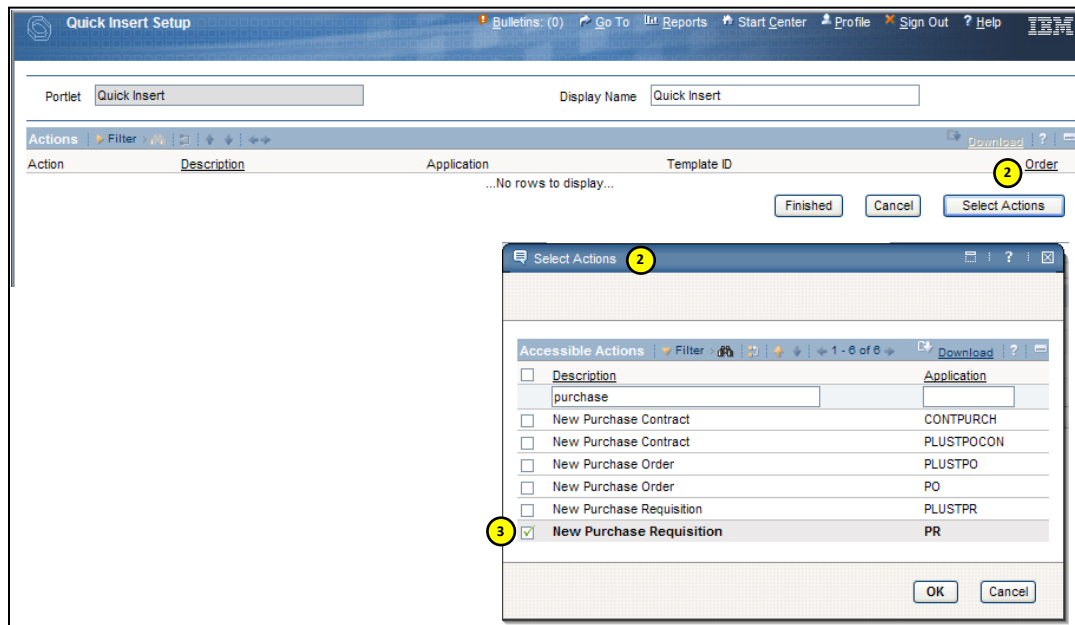
4. Check the box beside the action you are adding, then click OK.

5. To add more actions, repeat steps 2 through 4 above until you are finished.

6. You can specify what order you want the actions to appear. To specify a sequence, enter an order number in the Order column. Actions that do not have an Order number are arranged alphabetically.
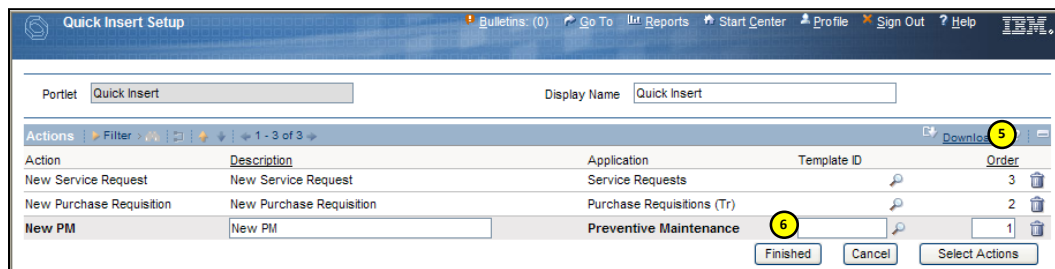
7. Click the Finished button.

8. When you return to the Start Center screen, your Quick Insert icons will be listed.
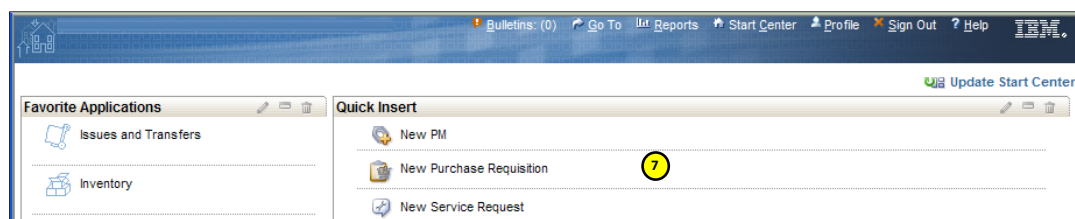
Result Set Portlet

The Result Set Portlet is a window that displays a query that you select. It also offers some options for how it displays the records. You can select the columns to display. You can also set a color for a row based on a field and a pre-determined value. For example, if an item is a priority one (1) it can display as red; if it is a priority two (2) it can display as yellow. You can also set the number of rows to display in the result.

Result Set portlets use existing queries. If you want a custom Portlet, you first need to create a customized query. Instructions on creating customized searches are provided in the Introduction to Maximo volume.

Set up a Result Set:

1. In the Result Set window, click the Edit Portlet icon on the gray window bar.
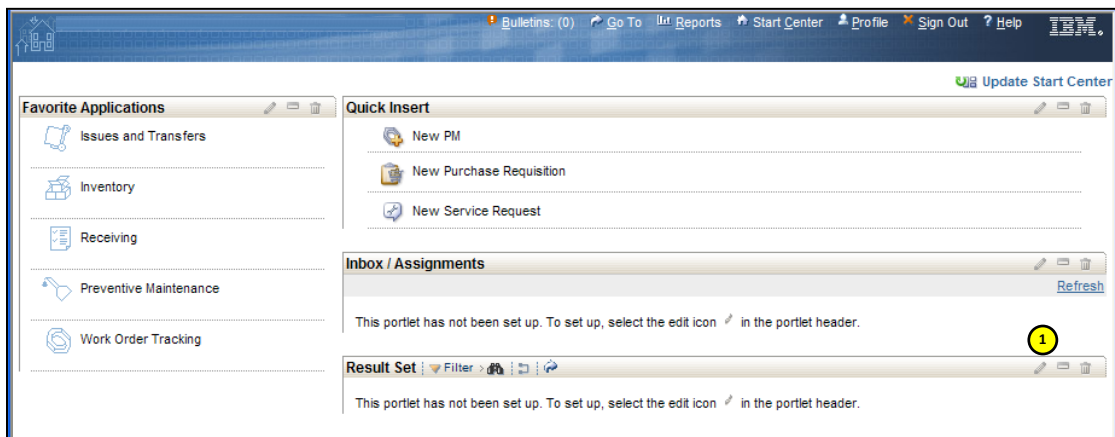
2. Click to select a query from the Available Queries tab.
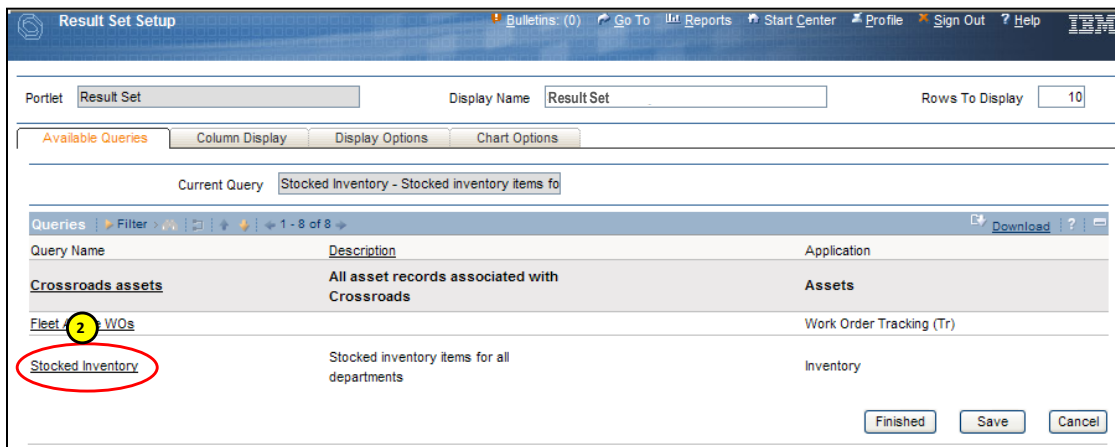
3. This will automatically open the Column Display tab.

Add or Change Which Columns Display

You can change the columns that display in the chart from within the Result Set portlet setup of Start Center.

Add or change the Result Set columns

1. In the Column Display tab, in the **Display?** column, check the box for the columns you want to display. NOTE: You can also change the order that the columns are displayed in the **Order** column.

2. Click the Finished button.

3. After clicking Finished, you return to the Start Center.

Apply Colors to Result Set Rows

You can apply colors to rows in the Start Center Result Set portlet to meet user-defined standards or set-points. You can only apply color to one condition attribute in a result set.

Before you apply color to a row, have in mind the circumstances for which you want to see rows called out in a different color, for example, all work orders whose status is WAPPR.

To apply color to an attribute in a result set:

In the Display Options tab:

1. In the **Condition Attribute** field, click the Select Value 🔍 icon.

    In the example below, records will be colored based on criteria of the item's **Last Issue Date**.

2. Click the Add Color Alert button.

3. Specify sort criteria in the **Expression** field and a value in the **Expression Value** field.

4. In the **Color** field, use the drop-down menu to select the color for this particular alert (you can also type in the hexadecimal manually).

   In this example,

   - Records issued before 12/10/08 will be blue
   - Records issued between 12/10/08 and 12/10/09 will be colored red

5. To specify another condition, repeat steps 5 through 8.

6. Click the Finished button. The Result Set portlet now displays records based on your sort and color criteria.

Change the Display Name

You can change the name that the system displays on the Start Center page for the Result Set portlet.

To change the display name:

1. From the Result Set portlet, click Edit Portlet ✎.

2. Type a new name in the **Display Name** field.
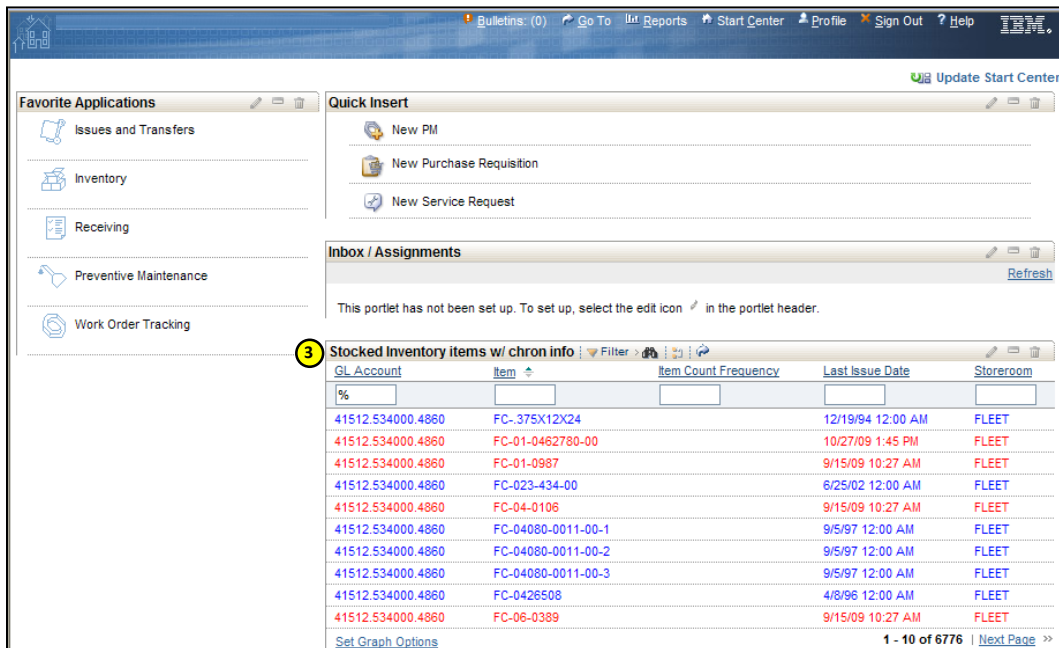
3. Click the Finished button. The new name is displayed on the Result Set portlet.

Return a Result Set to an Application

You can return a result set that is displayed in the Result Set portlet to the List tab of an application associated with a query. This lets you continue to work in the associated application using the result set.

To return a result set to the List tab of an application:

1. In the Result Set portlet, in the gray window bar, click the Open result set in the application 🔁 icon.

2. The query will open in the original application (in this case, Inventory).

Set Result Set Chart Options

You can set chart options in the Start Center Result Set portlet. You can create a bar chart or a pie chart.

To set chart options:

1. From the Result Set portlet, click Edit Portlet ✏.

2. Select the query that you want to work with on the Available Queries tab and open the Chart Options tab.

3. If you want the chart to appear on the Start Center page automatically, select the Show Chart by Default? check box.

4. In the **Chart Type** field, select the type of chart.

5. In the **Display By** field, select a column to base the chart on.

6. Click the Finished button.

NOTE: If you did not perform step 3, you can display the chart by clicking the Graphical View link in the Result Set portlet.

Change the Chart Type

You can change the chart type (bar or pie) from the Start Center by clicking the Chart Type link. You can also change it in the Result Set portlet setup.

To change the chart type from Start Center:

1. With a chart displayed, click the link beside Chart Type.

2. In the Graph Options dialog box, select a new Chart Type. With this dialog box open, you can also make any other changes, if necessary.

3. Click OK.

To change the chart type in the Result Set portlet setup:

1. Ensure that the proper query is listed in the **Current Query** field.

2. Select the Chart Options tab.

3. In the drop-down list **Chart Type** field, select the chart type you want.

4. Click the Finished button.

Display the Chart by Default

You can have either a list or the chart display by default on the Start Center page. You can set this up within the Result Set portlet setup, but you can change which one displays while on the Start Center page. For information about setting the display while on the Start Center page, see Start Center help.

To display the chart by default:

1. Ensure that the proper query is listed in the **Current Query** field.

2. Select the Chart Options tab.

3. Check the **Show Chart by Default?** field.

4. Click the Finished button.

Attachments

> **WARNING: Viewing, creating, or editing an attachment saves the record.**
>
> **Before using the Attachments function, make sure that all fields are correct. If you aren't ready to save the entire record, don't use Attachments.**

Maximo records can have attached files or URLs for various reasons. Uses include:

- Photos of work done, including before and after photos

- Supporting documents for service requests or work orders

- Link to a Web page (URL) for a catalog page, MSDS information, etc.

Any time you see the Attachments paper clip icon ✐ , you can add an attachment or URL to a record.

IMPORTANT NOTE:

Only files with the following formats can be enabled for printing: .pdf, .csv, .txt, .jpg, .gif, .xls, .doc, or .ppt (Microsoft XP/2003 format).

Attach a file to a record
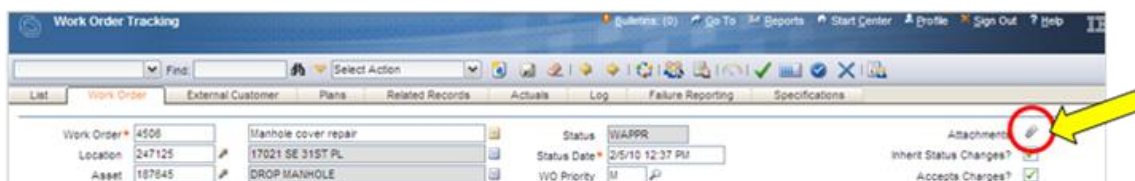
1. Click the paper-clip icon ✐ in the upper right-hand section of the record.

2. Click Add New Attachments, then select Add New File.

3. To add a new file, in the Create a File Attachment dialog box, click the Browse button to find and open the file.

4. In the Name the document field, enter the name you want shown in a library folder. (This field only allows 8 characters.) Enter a description next to the Name if desired.

5. Click OK. You return to the main record screen.

6. To see if the attachment was uploaded successfully, click the paper clip icon, then select View Attachments.

NOTE: A record has an attachment when the paper clip is outlined in orange.

Attach a URL to a record

1. Click the paper-clip icon in the upper right-hand section of the record.

2. Click Add New Attachments, then select **Add New Web Page**.

3. In the Create a URL Attachment dialog box, enter the link to the Web site in the **Specify the URL** field.

4. In the **Name the document** field, enter a file name for the URL. Enter a description next to the Name if desired.

5. Click OK. The paperclip gets a red outline.

6. To see if the URL was uploaded successfully, click the paper clip icon, then select View Attachments.

Add image to an Item Master record:

NOTE: Only .jpg and .gif formats are allowed.

1. In the Select Action menu, select Add/Modify Image.

2. In the Add/Modify Image dialog box, browse for and open the image file for this item.

3. Click OK.

The image now displays in the upper right-hand record section.

(LOGO)

Appendix A – Search Basics

Wild cards

Wild card	Description	Example results:
~null~	No characters in the field	(blank)
% **OR** != ~null~	Any character **OR** Not null (equivalent)	(Not blank.) Any record that has a value for that field, such as a number or name: **49EE** **ABC-989** **FRED** **UTIL**
123%	Characters that start with 123	**123**45 **123**9-EE **123**99990-004
%123	Characters that end in 123	SI88**123** WO-9**123** 99990**123**
123	Characters that contain 123	PK-8**123**450 WO-**123**94
123? **OR** 123_	Four-character record that starts with 123	**123**4 **123**A **123**#
_123 **OR** ?123	Four-character record that ends with 123	2**123** B**123** -**123**
=123	Record is *exactly* 123	**123**
!=123	Record does not contain 123	124 9987124599-ENG S559SS195

Appendix B – Maximo Icons and Buttons

Button	Name	Maximo Button Function
↗	Detail Menu	Displays a menu of actions available for the field Select Value - Use to select a value from a predefined list. • Drilldown - Use to open the Equipment / Location Drilldown. • Classification - Use to locate an item, asset, or location, if it has been included in a classification within the system. • Go to link - Use to link to the listed application.
▤ ▤	Long Description	Provides room for entering more data than can fit in the on-screen field.
🗓	Select Date and Time	Displays the Select Date and Time dialog box.
▦	Select Date	Displays the Select Date dialog box.
🔍	Select Value	Displays a dialog box showing available values for the fields.

Toolbar buttons

Button	Toolbar Button Name
📄 📄	Insert New Record Insert New Record with autonumber
💾	Save Record
◪	Clear Changes
⬅	Previous Record
➡	Next Record
🔄	Change Status
Ⴤ	Route
📄	Overview Report
📄	Details Report

(LOGO)

Table window buttons

Button	Table Window Button Name and Function
▶Filter	Table Filter — Click to open the table filter. The table filter appears as a row of editable fields between the column headings and the first row in the table.
🔍	Find — Click to filter the table contents based on the entries in the filter fields.
	Clear — Click to clear the filter fields and restore the original rows displayed in the table.
	Previous Row — Click to move the focus to the previous record in the table.
	Next Row — Click to move the focus to the next record in the table.
	Previous Page — Click to show the previous page of records.
	Next Page — Click to show the next page of records.
	Download — Click to download the contents of the table.
	Hide Table — Click to minimize or hide the table.
	Show Table — Click to maximize or show a hidden table window.
?	Help icon — Click to display table window help.
▶	View Details — Click to open the Row Details, displaying all fields in a record so that you can enter, view, or modify data.
▼	Close Details — When the Row Details are open, the View Details button changes to the Close Details button. Click to close the Row Details.
	Add to Bookmarks — Marks a document or record for later viewing.
🗑	Mark Row for Delete — Marks a record for deletion.
	Undo Delete — Restores a row that you marked for deletion.
✕	Delete — Click to delete a table window row.
New Row	New Row — Inserts a new row and opens the Row Details if it is not already open.

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