



Maximo User Guide Getting Started

26/8/2011

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1. GETTING STARTED

This Maximo User Guide gives users a general overview to login, navigation and common buttons/controls in Maximo. Refer to the Works Management and Purchasing User Guides for specific usages of the main transactional Maximo modules.

2. MAXIMO HELP AND GUIDES

This document is a quick overview of the user interface of Maximo, for detailed descriptions of functions, refer to the **Maximo Online Help** by going to the help link in Maximo or refer to Chapter 2 of the '**Maximo 7.1 Product Reference Guide**' (mam71_prod_ref_guide.pdf).

3. ACCESSING MAXIMO

1. Open the Maximo Application

To access Maximo, go to the Sydney Airport Intranet and find the link "FM Maximo". Alternatively open Internet Explorer and type in the following URL into the address bar:
<http://sydair.unitiFM.com>

You should see the following log screen.



Figure 1: Maximo Login Page

2. Enter a valid Maximo User Name

To be able to Log into Maximo, a registered username and password is to be used. Your Maximo userid is the same as your **network login**. Passwords will be sent to you via email.

3. Enter a valid password for the User

You password will be emailed to you by the system.

4. Press the 'Sign In' button

You should now be redirected to the Start Centre.

5. No User

Ensure your password and user name and correctly typed (case sensitive). If you do not have a valid user contact IT or press the 'Register now' link to register a user.

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3.1. Self Registration

Self registration allows a person to obtain a username and password to Maximo if one has not already been set up. To register, click the 'Register now' option and the following screen will be displayed:

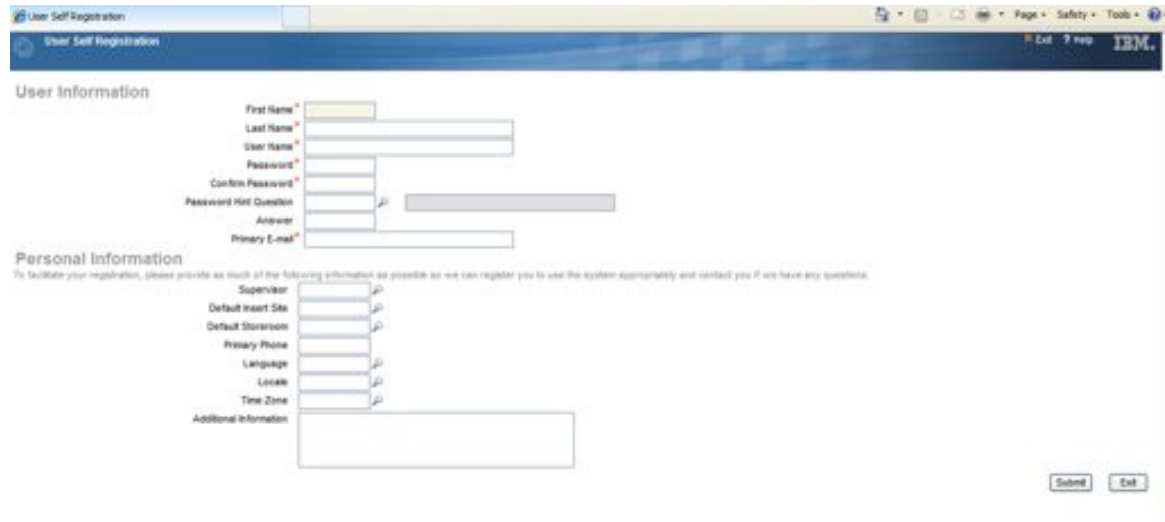


Figure 2: User Self Registration page

4. MAXIMO APPLICATION AREA

The Maximo Application is web-based and operates from within a standard web browser. Do not use your Web Browser buttons and controls to navigate in Maximo. All Maximo specific functionality will be contained within the Maximo area as shown in below.

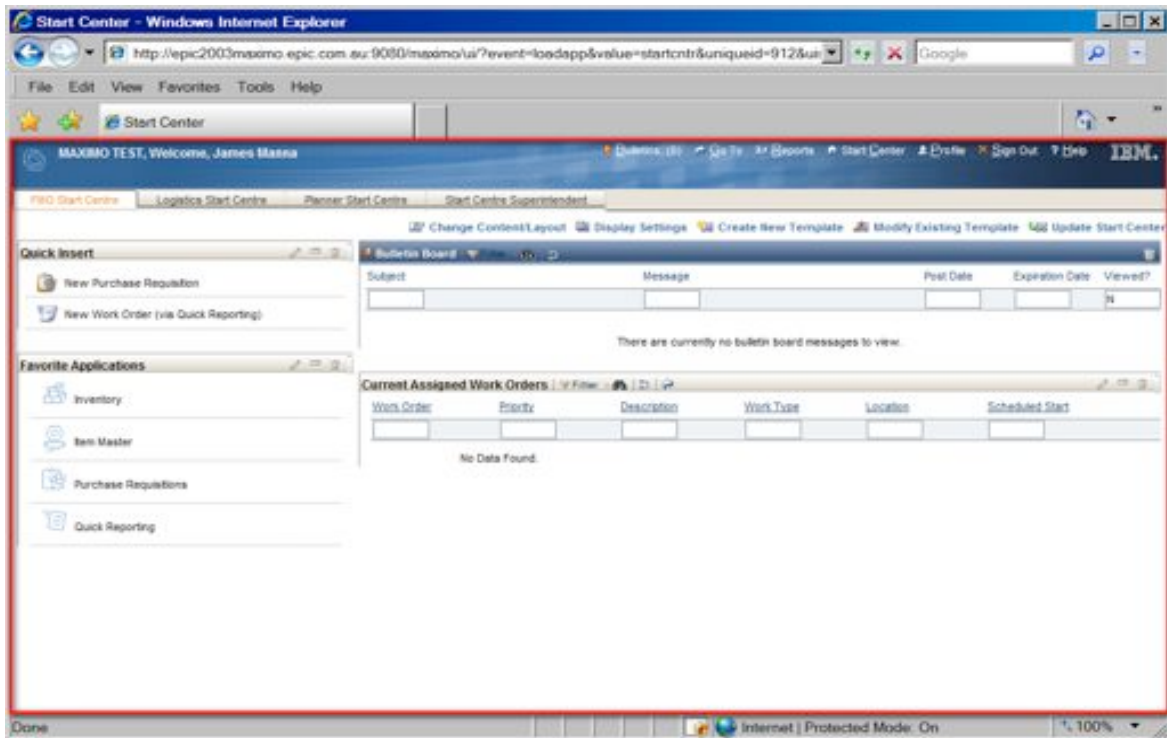


Figure 3 Maximo Application Area

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5. MAXIMO START CENTRES

As soon as a user logs in, the Start Centre is displayed. This is configured for each security group and can contain links to actions, applications, data and reports (list reports of graphical KPI reports).

A Start Center has been configured for each group of user. Your Start Center will default to the appropriate start centre. An example of a Start Centre is pictured below.

It has been configured with "Quick Insert Links" and "Favorite Applications" relevant to the user role.

A "Result Set" has also been added to show currently assigned Work Orders.

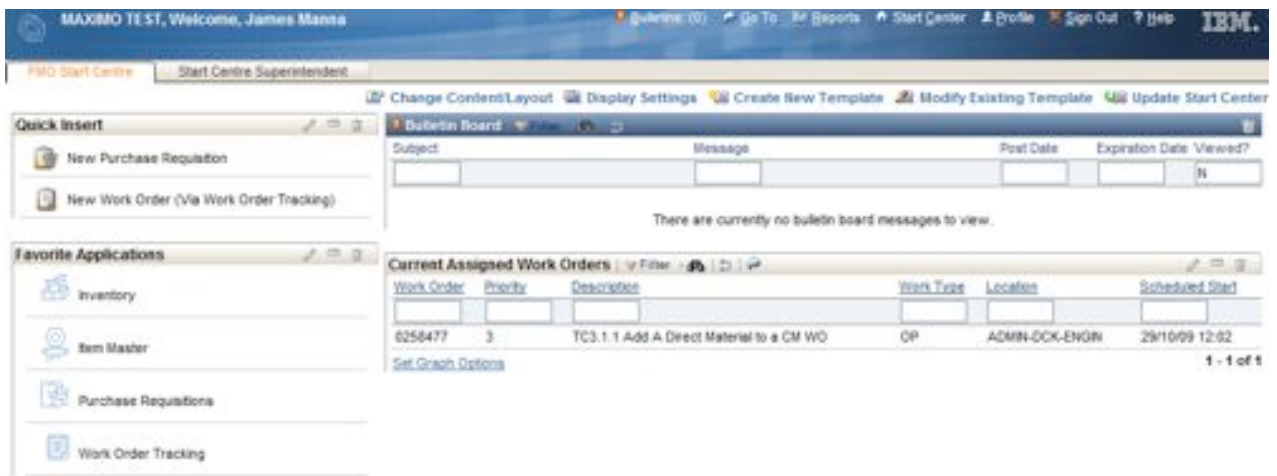


Figure 4: Maximo Start Centre

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6. MAXIMO NAVIGATION BAR

The top area of the Maximo Screen is the Navigation Bar.

Navigation Bar shows the current user (when you are on the Start Centre)



Figure 5: Navigation Bar Start Centre

Navigation Bar shows the current application (when you are in an Application)

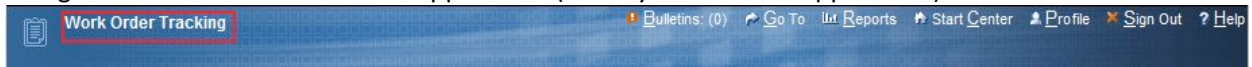


Figure 6: Navigation Bar in an Application

Navigation Bar shows messages (Such as save confirmations etc)

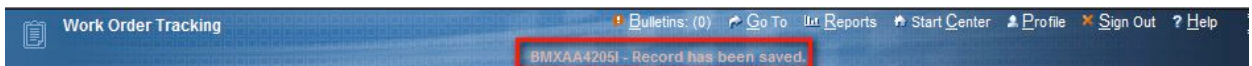


Figure 7: Navigation Bar Showing Save Confirmation Message

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Navigation Bar displays the menu links that are used for navigating around the various Maximo applications.

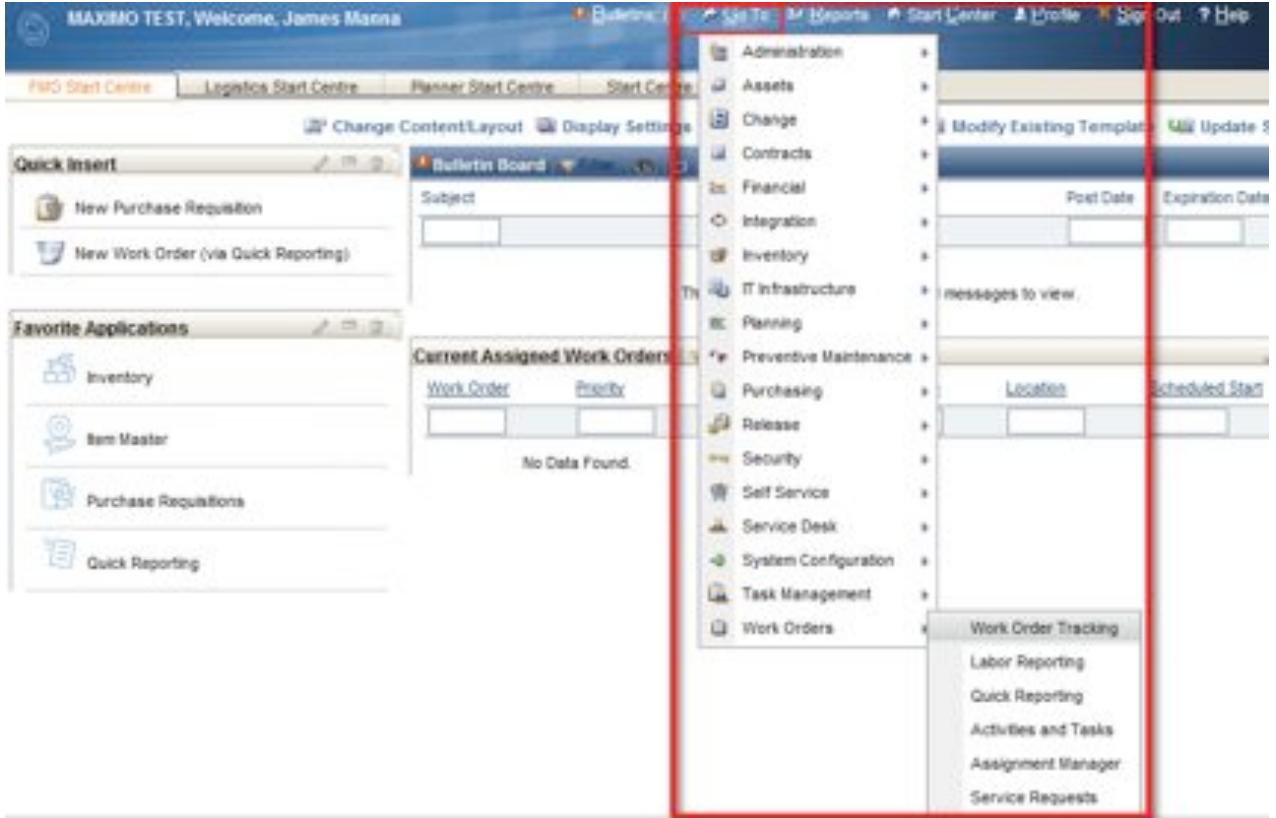


Figure 8: Maximo Navigation Main Menu

- **Bulletins** . Click to display the Bulletin Board and view broadcast messages. This link only appears when there are active Bulletin Board messages.
- **Go To** . Click to display a menu of modules, letting you manoeuvre among modules and applications.
- **Reports** . Click to display a menu of modules, letting you manoeuvre among modules and applications to select an application to run reports against.
- **Start Center** . Click to return to your Start Center.
- **Profile** . Click to manage the personal information (address, phone, e-mail, and so forth), defaults, and Maximo password recorded on your Maximo person and user records.
- **Sign Out** . Click to sign out of Maximo.
- **Help** . Click to display the help menu (when selected from application pages), or context sensitive help (when selected from dialog boxes). This link is always available.

7. MAXIMO TOOLBAR

The Maximo Toolbar contains the actions that are common across most of the applications. It is divided into 4 sections: Query menu, Find field, Select Action menu and Toolbar buttons



Figure 9: The Maximo Toolbar

Simple Toolbar Buttons:

| Button | Function |
|---------------|---|
| | Create a New Record |
| | Create a New Record – having Maximo auto-generate the number |
| | Save the current record |
| | Clear all changes to the page and return to the List tab |
| | Previous record in the result set |
| | Next record in the result set |
| | Change status of the current record |
| | Run a report in 'Browser View Mode' |
| | Print a report in 'Direct Print' mode |

Advanced Toolbar Buttons:

| Button | Function |
|---------------|--|
| | Select Owner for the current record |
| | Take Ownership of the current record |
| | Approve the current record |
| | Change the current records status to In Progress |
| | Change the current records status to Complete |
| | Change the current records status to Closed |
| | Create a BIRT Report (Advanced feature) |
| | Create a KPI report |

8. MAXIMO APPLICATION CONTROLS

When you first open an application, you are presented with a common look and feel as below.

At this point you can search and navigate the Maximo database using a variety of methods.

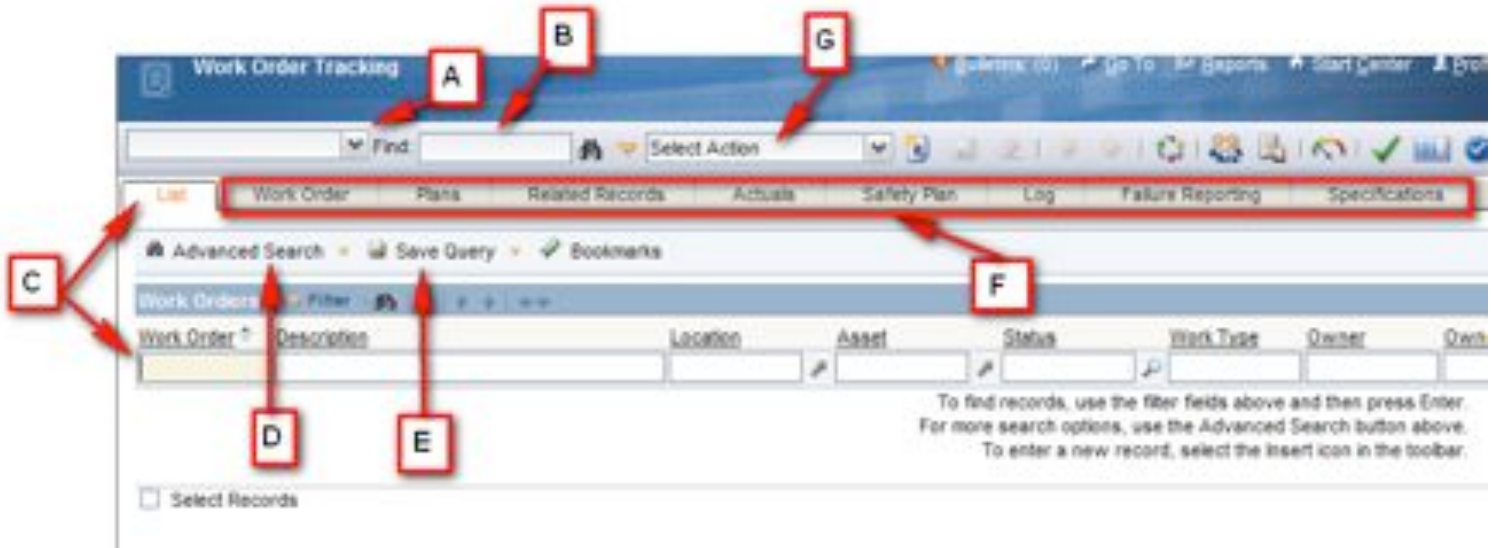


Figure 10: Maximo Application main features

The main functions of interest are:






| Ref. | Function | Description |
|-------------|------------------------|--|
| A. | Saved Query Listing | If any Saved queries exist (as created by using E. or created by other users), they will display here. |
| B. | Find Field | Used for a search on an exact key, i.e. a complete work order number. |
| C. | List Screen and fields | The first tab is the 'List Screen', where you can perform basic searches, view records and 'download' data. Enter a value in any field and press enter. |
| D. | Advanced Search | This gives you access to search on more fields than are available in the |
| E. | Save Query | This option allows you to save your common queries, which can be accessed from A. |
| F. | Record Tabs | Once you select a record from the List Screen, the remaining tabs show that records specific data. Clicking here with no search results displays the first record. |
| G. | Select Action | This displays a range of actions that can be performed on the record or list of records. |

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9. ENTERING & SELECTING VALUES

In Maximo you can generally always type a value directly into a field. Often there will also be a control/button alongside the field to either assist you or to provide validation on the field.

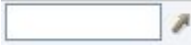
The following buttons may be present

| Button | Name | Function |
|---|----------------------|---|
|  | Detail Menu | <p>Displays a menu of actions available for the field. The options vary depending on the application and field you are using. Some common Detail Menu options include the following:</p> <ul style="list-style-type: none"> 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 | <p>Provides room for entering more data than can fit in the on-screen field.</p> <p>After you create a long description entry, the button changes color to indicate that additional information is available.</p> |
|  | 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, often lists of records created in other applications. |

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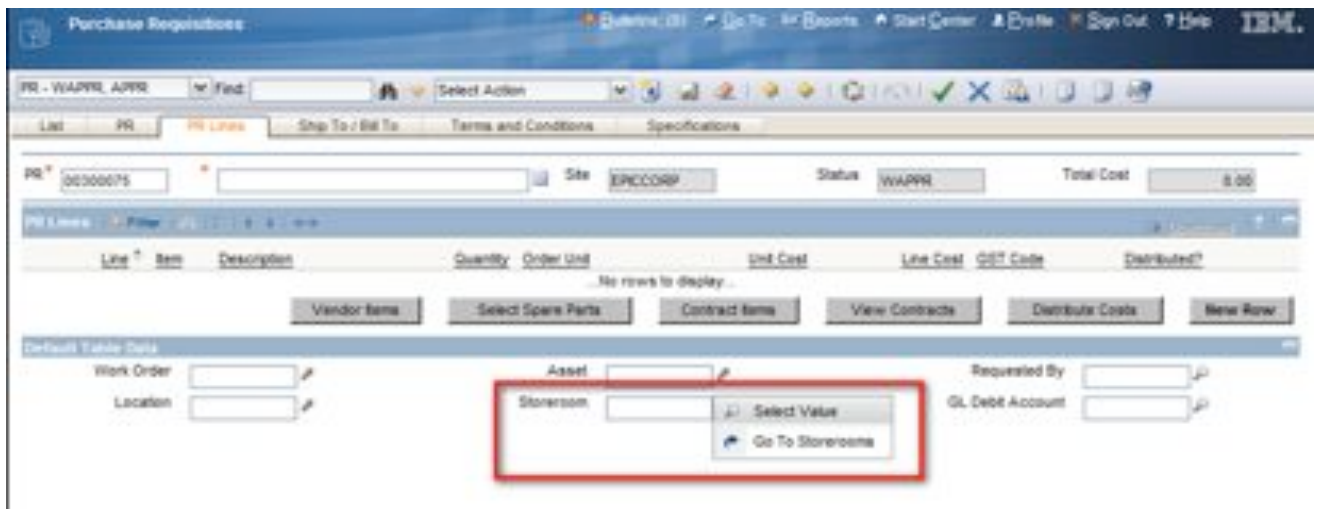
9.1. Details Menu - Select Value vs. GOTO.

In the example below, we are entering a 'Storeroom' on a PR. Of course it only makes sense that valid Storerooms can be used hence some validation will occur on this field.

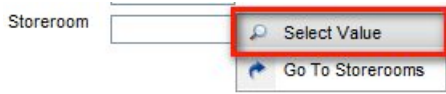
The 'select' icon  indicates a field has such validation present.

We typically (not always) have 3 choices:

- 1) Enter a valid value manually (if you enter an incorrect value a message will display)
- 2) Use the Select Value option
- 3) Use the Go To option (not always present)



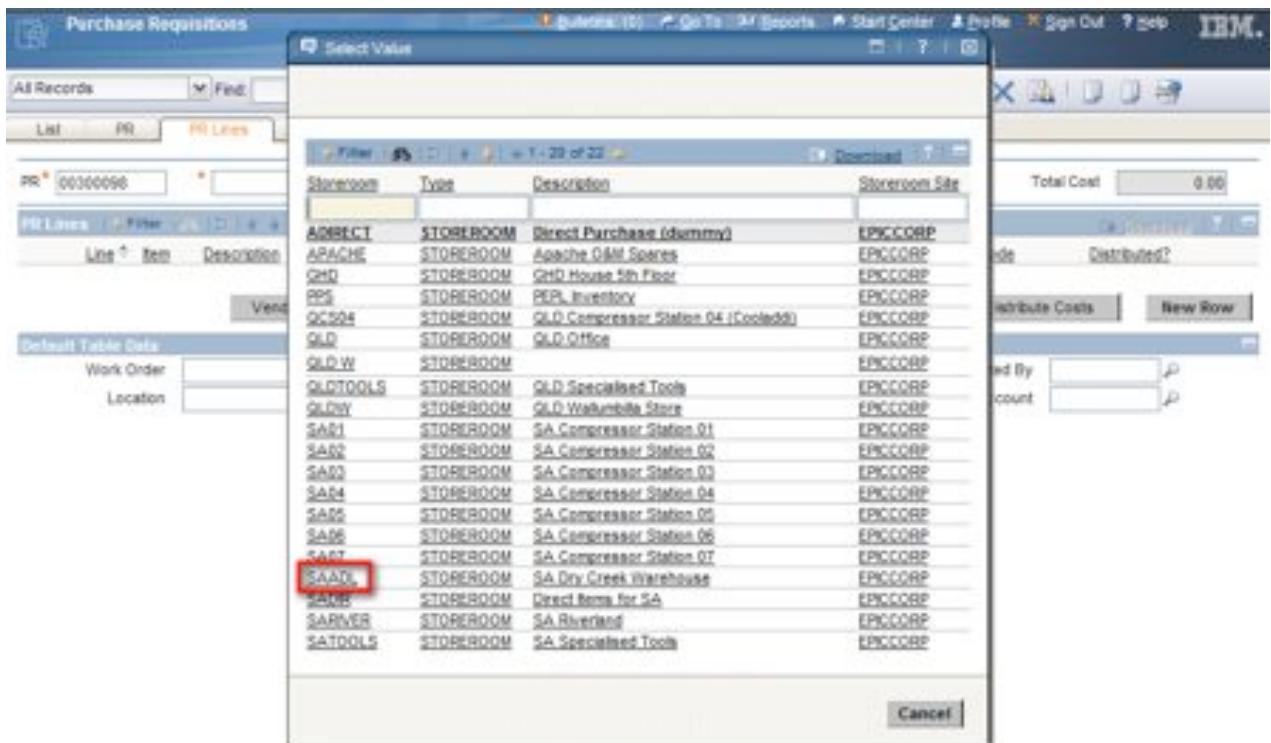
Select Value



If we choose this option, we are presented with a 'Select Value' dialog window.

This is a small window, allowing us to filter on the available columns to find the value we are looking for.

To select a value, simply click on the value you wish to use, typically in the first column, i.e. the Storeroom.





Go To



When choosing the 'Go To' Option, when available, another application is actually opened as per below.

In our example, the actual Storerooms Application itself opens. This allows us to access the full function of the application and view all the details of a Storeroom.

To select a value, you choose a Value (i.e. a Storeroom) and choose 'Return with Value'. Selecting 'Return' will just return with no value.

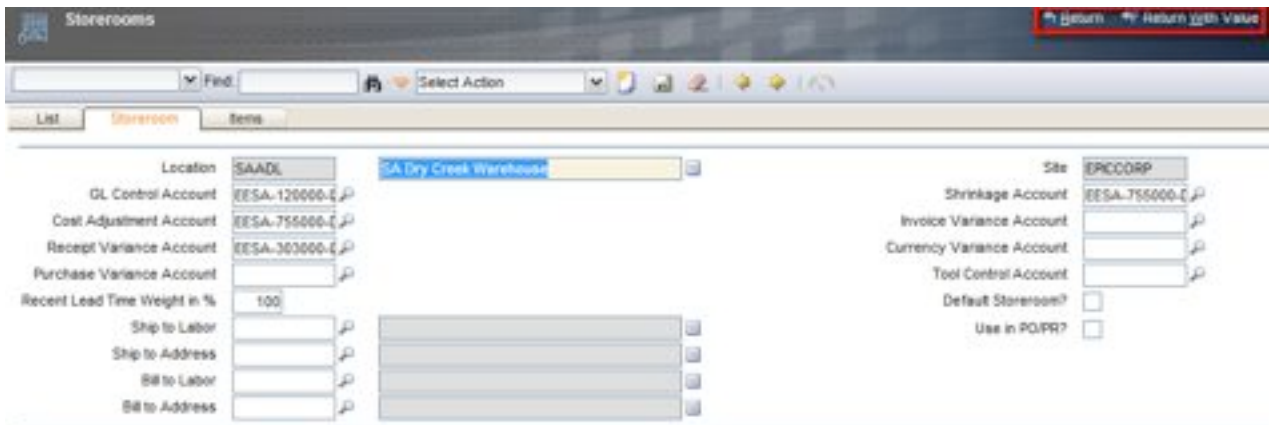
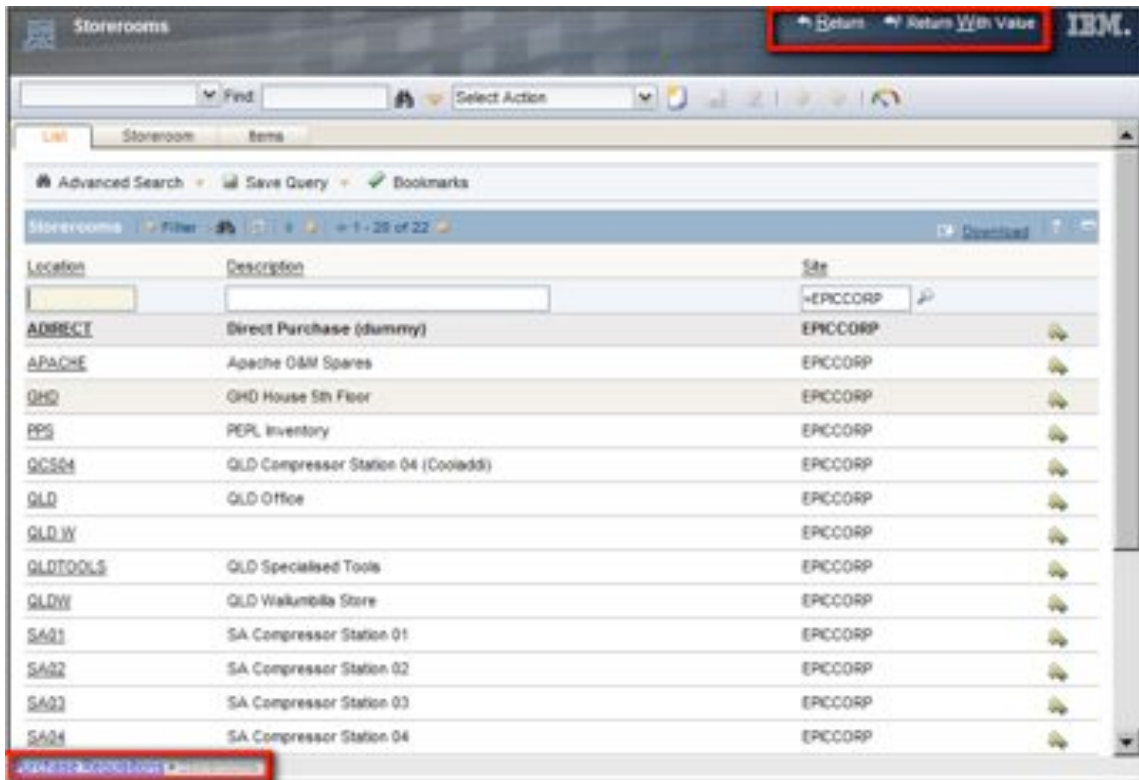
-  **Return with Value** . Click to return to the previous application page with selected value(s).
-  **Return** . Click to return to the previous application page without selecting a value.

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The 'Breadcrumb' trail at the bottom left hand corner of the screen shows where you have navigated from.

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10. WILDCARDS IN SEARCHES

The following information applies to both List Screen filters and Advances Search

10.1. Wildcards

You can use a "wildcard" character or characters with letters or numbers to indicate you want to find records that begin with, end with, or contain those letters/numbers.

There are four characters you can use as a wildcard: the asterisk (*), the percent sign (%), the underscore (_), and the question mark (?).

Use * or % to stand for any number of characters (zero, one, or multiple) in the specified position.

There should be no space between the wildcard and the other characters.

Example: Enter 123* or 123% to find records that **start** with 123, such as 123, 12345, 123ABC, etc.

Example: Enter *123 or %123 to find records that **end** in 123, such as 123, 5123, or PUMP123.

Example: Enter *123* or %123% to find records that **contain** 123, such as 123, 1234, PUMP123, or XX12300Valve.

Example: Enter Elec* or Elec% to find records that contain words that **start** with "Elec," such as electric, electromagnetic, or electrode.

Use _ or ? to stand for a single character in the specified position.

Example: Enter 123? or 123_ to find any four-character records that start with 123, such as 1234, 1230, 123g, etc.

Example: Enter _18 or ?18 to find any three-character records that end with 18, such as 418 or J18.

10.2. The Equal Sign (=) Operator

You can place an equal sign (=) before a word or number to find only records that match that word or number exactly. There should be no space between the = and the word or characters that follow it.

- = means "match exactly"

Enter =123 to find any records with the exact characters 123 in the field. (Search results would not include

Example: numbers such as 0123 or 1234AB. If you enter just 123, without the =, search results *would* include 0123 and 1234AB.)

10.3. Searching for Null and Not Null Values

You can enter the following values into a search field on the List tab:

- When searching for a null value enter: ~null~
- When searching for not null values enter: != ~null~

11. QUERYING DATA ON LIST SCREENS

To filter a List screen, simply enter a value (free text or via select option) then press enter or the binoculars icon.

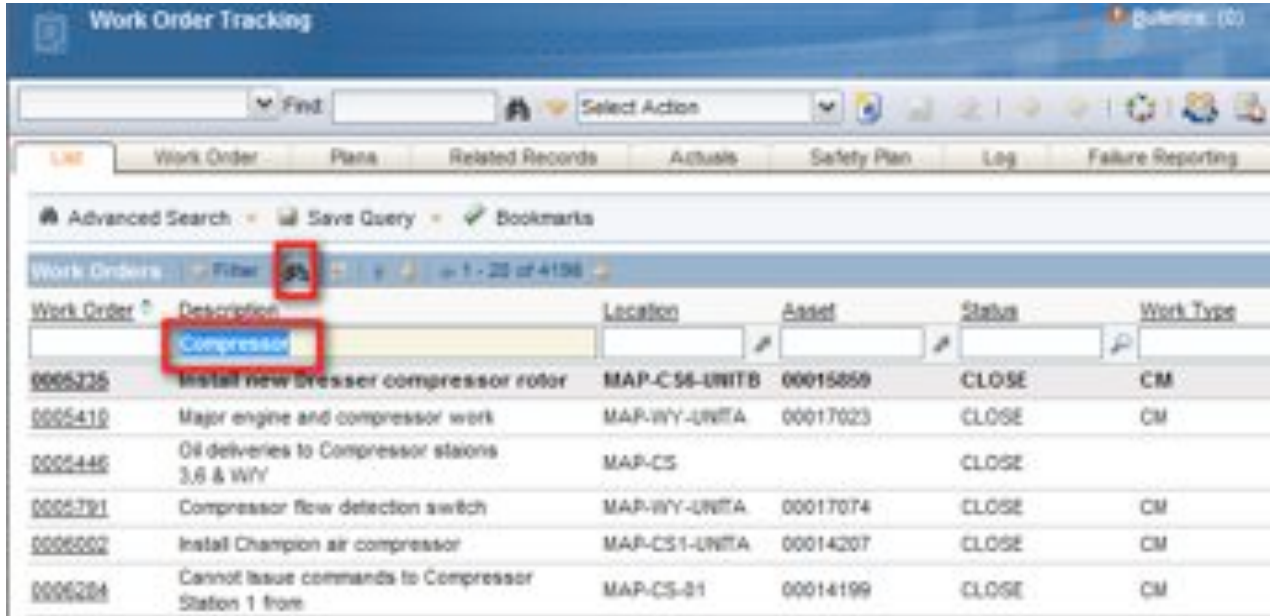


Figure 11: Applying a List Screen filter

You will note that when you are in a 'filtered' view, the filter icon is enabled as per below. To remove an active filter, simply press this icon and it will de-activate. Often if you wonder why you cannot see a record it because the filter is active.

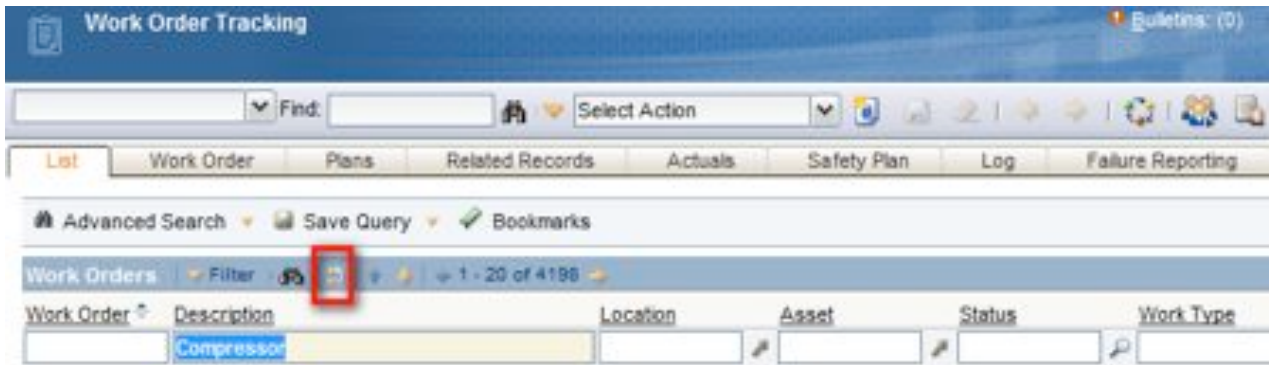


Figure 12: List Screen filter currently active

Some applications do not open the filter by default. If you ever open an application and cannot see a filter, press the filter arrow as below.

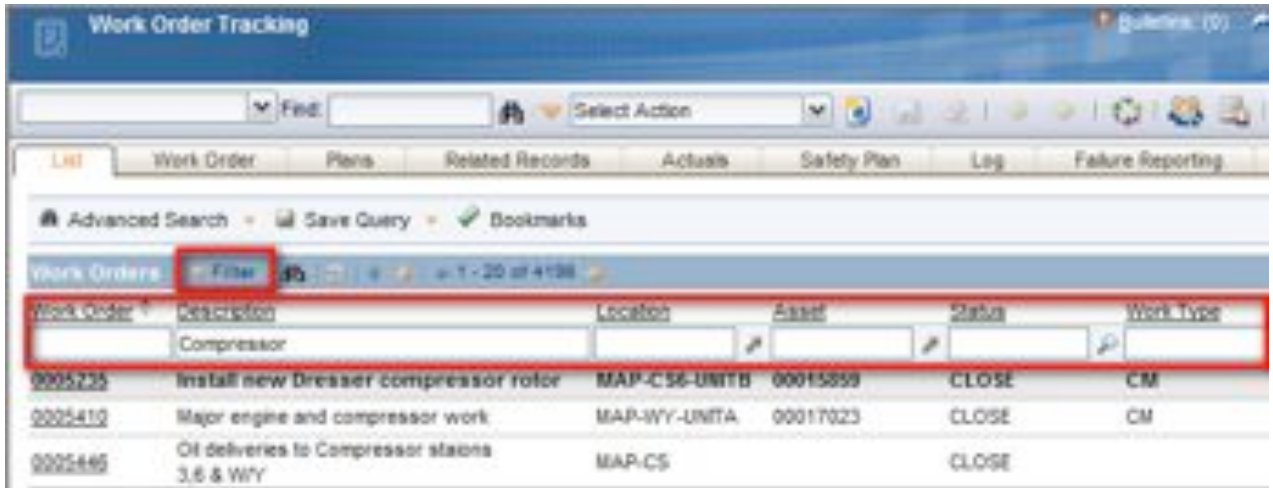


Figure 13: List Screen Filter Open



Figure 14: List Screen Filter Closed

12. NAVIGATING LIST SCREEN RESULT PAGES

Instead of filtering to find the record you are interested in, you can always browser the result set.

Here you can see we are currently viewing the first 20 of 80 matching records to our 'Compressor' description filter.

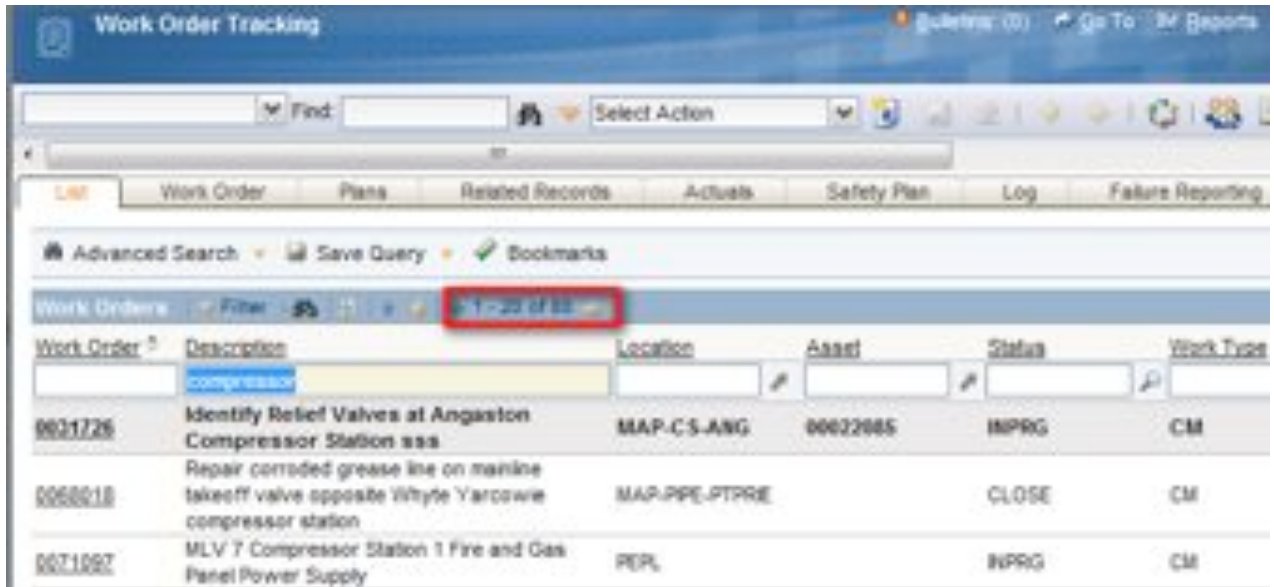


Figure 15: Result Page Navigation

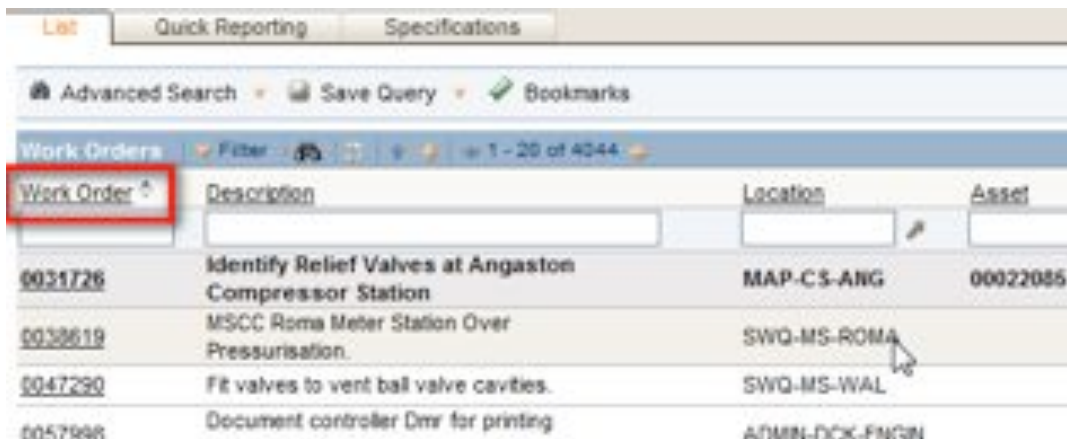
To move down the list, use the up and down arrows.

To move through the pages, use the left and right arrows.



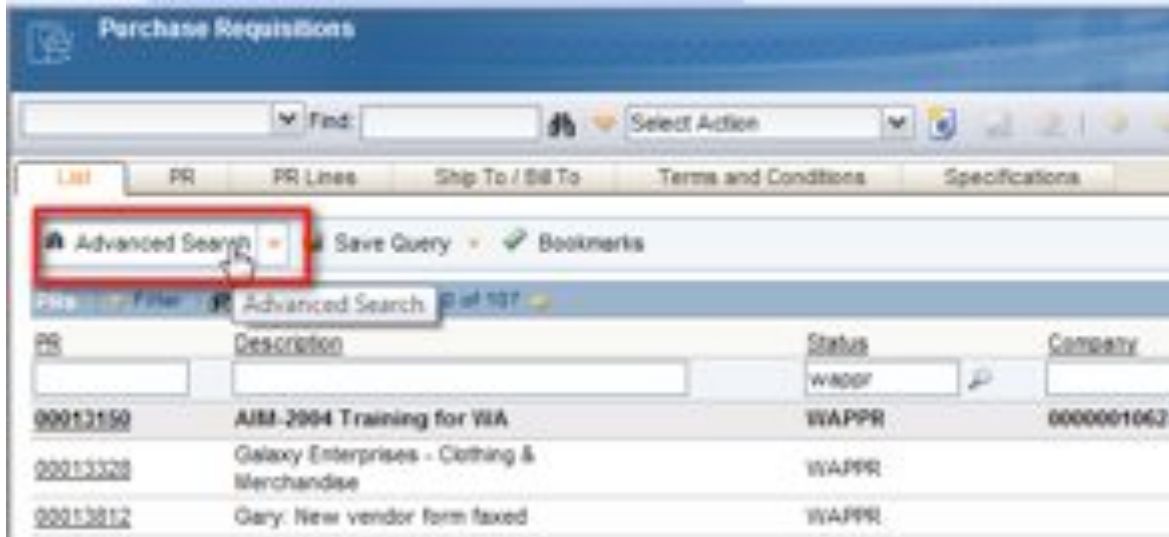
Figure 16: Result Page Navigation Buttons

To sort a column, simply click on the header to sort ascending, and again for descending. I.e. as per below, this would sort the column by work order number.

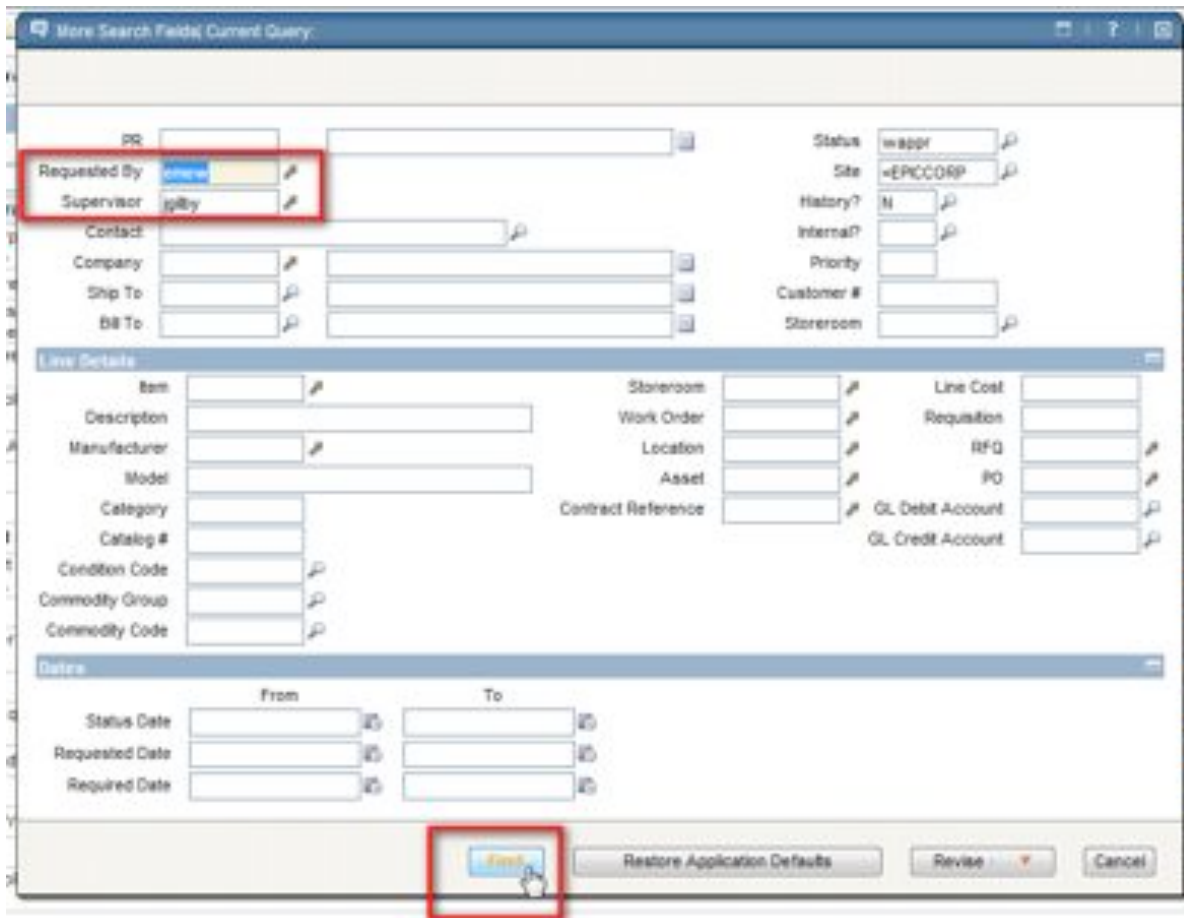


13. ADVANCED SEARCH

When the List Screen does not show value you wish to filter/search on, use the 'Advanced Search' function'. This gives you access to more fields to search and query on.



Enter values in the fields you wish to search on, then press Find.



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14. PRINTING AND REPORTING

Printing and Reporting in Maximo both use the BIRT Reporting functionality. All formatted print outs are printed versions of the inbuilt BIRT Reports. Commonly used reports have been added to the main applications using quick link buttons.

2 Main options are available:

- 1) **Direct Print:** Selecting this will send the report straight to your default printer (Not a message will display the very first time asking for permission)
- 2) **Browser View:** This gives you the option of previewing the report in your web browser and then in the Printable PDF, then also gives you the ability to print, download, export etc.

Hover over a button to see what action it performs, as below.

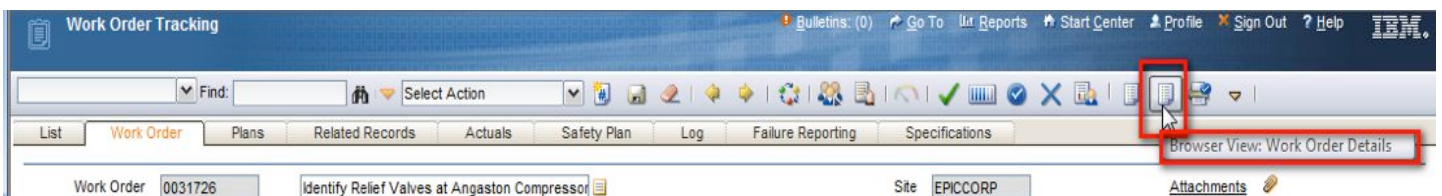


Figure 17: Browser View Work Order Details

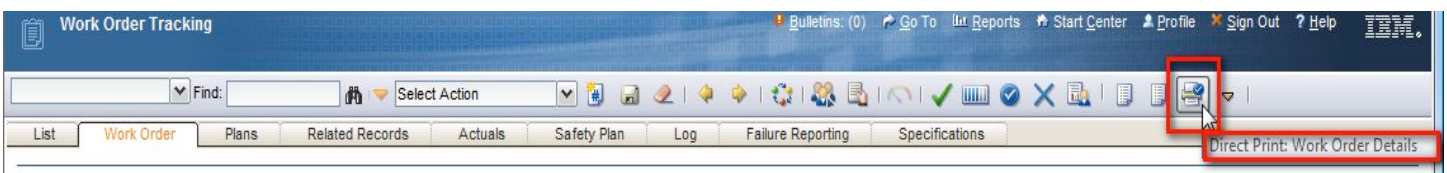


Figure 18: Direct Print Work Order Details

You can also access the full list of reports as well as advanced scheduling functions by selecting 'Run Reports' from the selection action menu.

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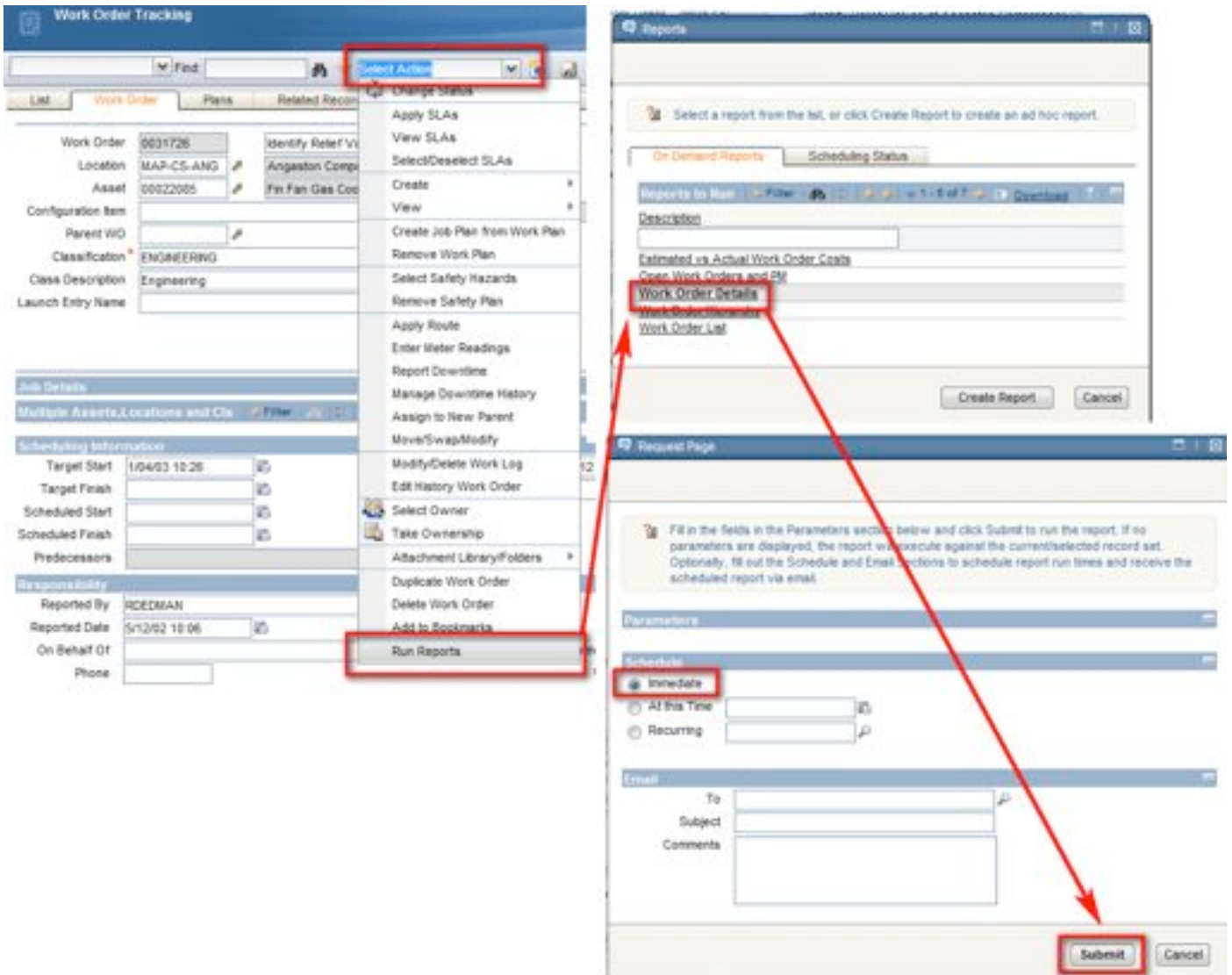


Figure 19: Select Action Run Reports

15. LOCATION AND ASSET DRILLDOWN

When selecting a Location (or Asset) on screens, you will be presented with a variety of options.

The first 2 methods you will use are the Select Value and Go To methods, as discussed earlier.

The last is the 'Open Drilldown' mode, allowing you to browse locations via the Locations (& Assets) via a Hierarchy.

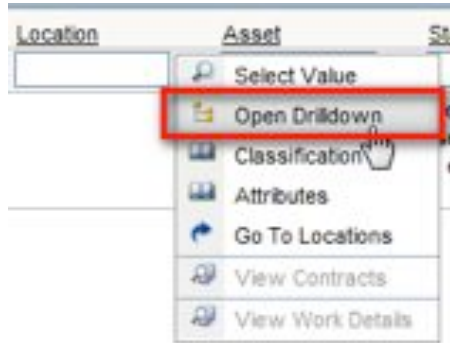


Figure 20: Open Drilldown

To select a location, simply drill down as far as required, then select a location by clicking the blue square next to the location you desire.

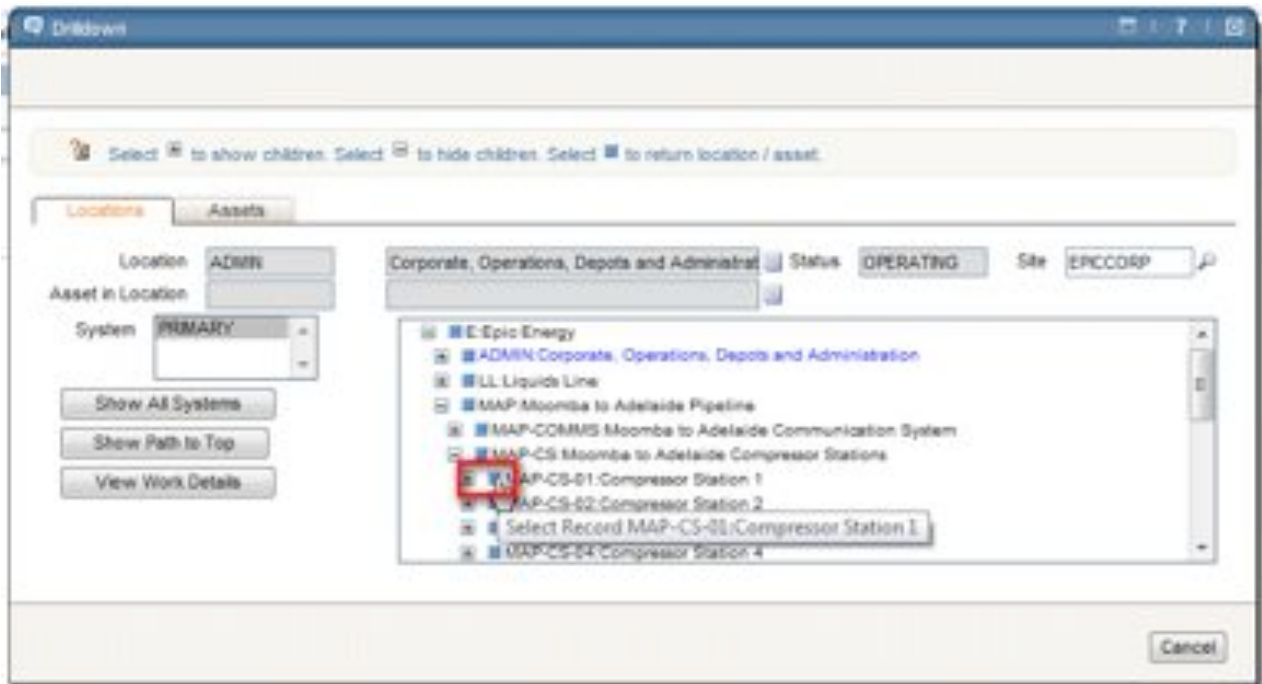






Figure 21: Select Value from Drilldown

16. LONG DESCRIPTIONS

When a description field has the Long Description icon next to it, you can click once on this to enter a long description.

| | | | |
|------------|--------------|--|--|
| Work Order | 0092484 | CS4 Replace after cooler #2 fan bearings |  |
| Location | MAP-CS4-PROC | Process Gas |  |
| Asset | 00022012 | Aftercooler No1 (SA PV) |  |
| Work Type | BM | | |

When the icon is orange (as pictured below) this indicated a long description has already been entered

Work Order: 0092484 CS4 Replace after cooler #2 fan bearings 

Long Description

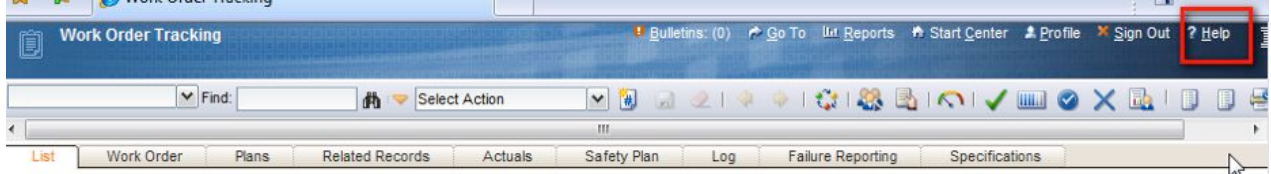
CS4 Replace after cooler #2 fan bearings

27/9/09
After cooler fan bearings have collapsed and require replacement.
Refer WOI# 91951. Drive hub and belt have already been replaced.
David

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17. ONLINE HELP

Open help by locating the help icon in the top of the Navigation Bar



When you first open help, it will open to the help for the application/area you are currently in, i.e. it is context sensitive help.

To get to the general help, press

