

Indian Affairs, Division of Facilities  
Management and Construction

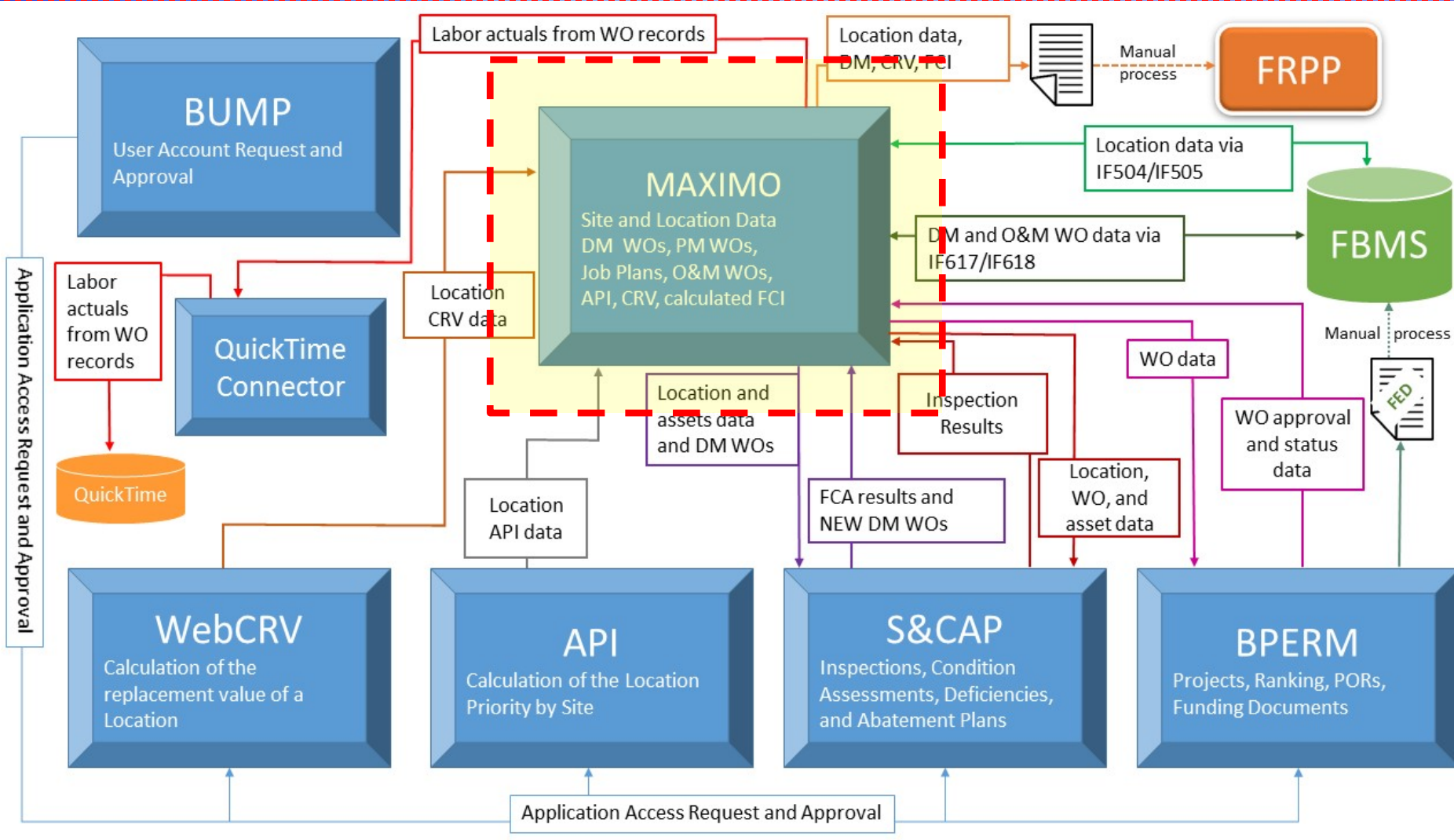
# Indian Affairs-Facility Management System (IA-FMS) Training

**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



# Logging into IA-FMS (Maximo)



Tivoli software IBM.

Welcome to BIA 7.5 Maximo Production



User Name:

Password:

Sign In

[Forgot Password?](#)  
[New User? Register Now](#)

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Hyperlink to BIA Intranet Maximo BIA User Login for PRODUCTION:  
<https://maximo.bia.gov/maximo/>

# IA-FMS - Start Center

The screenshot shows the IA-FMS Start Center interface. The top navigation bar includes 'Welcome', 'BIA User Template', 'SOD WESTERN USER', 'Bulletins: (2)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. The main content area is divided into several sections:

- 1:** 'Menu' bar (top navigation bar)
- 2:** 'Favorite Applications' (left sidebar menu)
- 3:** 'Quick Insert' (left sidebar menu)
- 4:** 'Bulletin Board' (top section header)
- 5:** Result Set (or filter) (table of bulletins)
- 6:** 'KPI (Key Performance Indicator) Graph' (gauge chart)
- 7:** 'KPI List' (table of KPIs)

The 'Bulletin Board' table contains the following data:

Subject	Post Date	Expiration Date	Viewed
>> IA-FMS Help Desk Contact Info	08/17/2015 9:49 PM	05/17/2017 11:47 PM	N
>> WELCOME TO MAXIMO 7.5	06/01/2015 2:17 PM	06/01/2016 12:00 AM	N

The 'KPI Graph' shows a gauge for 'WESTERN PRIORITY 5 WORK ORDERS' with a value of 38. The 'KPI List' table contains the following data:

Status	KPI	Actual	Target	Variance
-	WESTERN PRIORITY 5 WORK ORDERS	38	0	38

1. 'Menu' bar.

2. 'Favorite Applications'.

3. 'Quick Insert'.

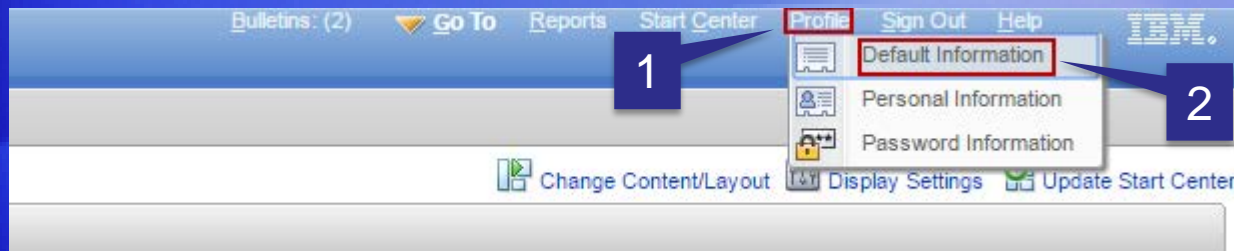
4. 'Bulletin Board'.

5. Result Set (or filter).

6. 'KPI (Key Performance Indicator) Graph'.

7. 'KPI List'.

# User Profiles - Updating



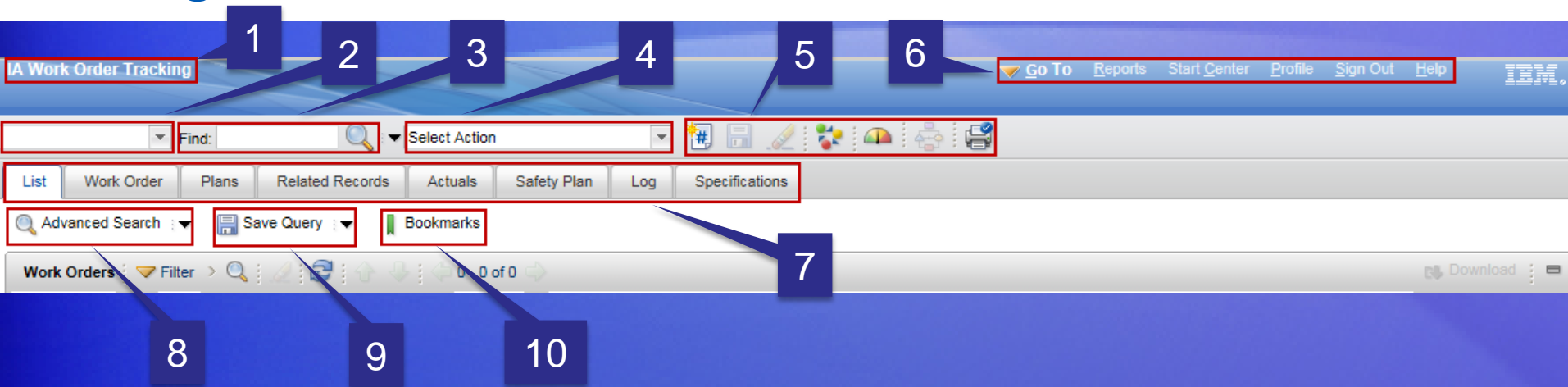
1. Select 'Profile'.
2. Select 'Default Information'.

3. Select 'Default Insert Site'.
4. Select 'Storerroom Site'.
5. Select 'Default Storerroom'.

A screenshot of the 'Default Information' user profile page. The page contains several fields and dropdown menus. A blue callout with the number '3' points to the 'User' field. A blue callout with the number '4' points to the 'Default Insert Site' dropdown menu, which is currently set to 'IE150' and has a search icon. A blue callout with the number '5' points to the 'Default Storerroom for Self-Service Requisitions' dropdown menu, which is currently set to 'AB223384' and has a search icon. The page also includes a 'Location #' field set to 'C58-10', a checkbox for 'Use Default Insert Site as a Display Filter?' which is checked, and a 'Storerroom Site for Self-Service Requisitions' dropdown menu set to 'IE150'. The dropdown menus show search results for 'ST. STEPHENS INDIAN SCHOOL' and 'IE150 STORE ROOM'.



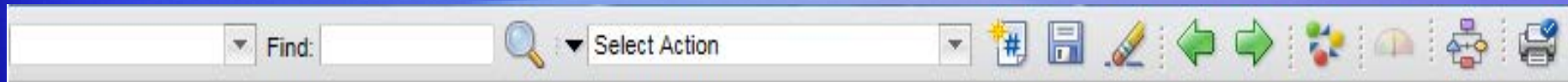
# Navigation – List tab

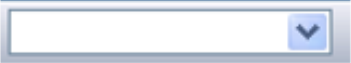
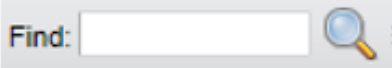









1. This lets the User know what application they are currently using.
2. This field stores/displays the list of 'Saved Queries'.
3. 'Find' field. The user inserts the exact record ID to display a record.
4. 'Select Action' list. This displays additional actions a user can perform to a record.
5. 'Tool 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



	<ul style="list-style-type: none"><li>• Access Saved Queries</li></ul>
	<ul style="list-style-type: none"><li>• Find a Specific Record</li></ul>
	<ul style="list-style-type: none"><li>• Use the Select Action Menu</li></ul>
	<ul style="list-style-type: none"><li>• Insert New Record</li></ul>
	<ul style="list-style-type: none"><li>• Save Record</li></ul>
	<ul style="list-style-type: none"><li>• Clear Information</li></ul>
	<ul style="list-style-type: none"><li>• View Previous / Next Record</li></ul>
	<ul style="list-style-type: none"><li>• Change Record Status</li></ul>
	<ul style="list-style-type: none"><li>• Initiates Workflow process.</li></ul>



# Application Tabs and Subtabs

The screenshot displays the 'IA Deferred Maintenance Tracking' application interface. At the top, there is a search bar with 'Find:' and a 'Select Action' dropdown menu. Below this is a horizontal tab bar with the following tabs: List, Work Order, Plans, Related Records, Actuals, Safety Plan, Log, Failure Reporting, and Specifications. A red box highlights these tabs, and a blue callout bubble with the number '1' points to them. Below the tab bar, there are input fields for 'Work Order: AB131665' and 'REPLACE METAL PANEL ROOF, 300 SF AND OVER', and a 'Parent WO:' field. A blue callout bubble with the number '2' points to a sub-tab bar below the main content area. This sub-tab bar contains four sub-tabs: Labor, Materials, Services, and Tools, which are also highlighted with a red box. Below the sub-tab bar, there are two data tables. The first table is titled 'Children of Work Order AB131665' and the second is 'Tasks for Work Order AB131665'. Both tables show columns for 'Sequence', 'Task', and 'Summary', and both contain the message 'There are no rows to display.'. The third table is titled 'Labor' and shows columns for 'Task', 'Labor', 'Name', 'Approved?', 'Start Date', and 'Start Time', also containing the message 'There are no rows to display.'.

1

1. Main 'Tabs'.  
2. 'Sub-tabs'

2

Labor Materials Services Tools

Task Labor Name Approved? Start Date Start Time

# Table Windows

1

Task	Labor	Name	Approved?	Start Date	Start Time	End Time	Regular Hours	Rate
	TJONES	Tom Jones	<input type="checkbox"/>	05/31/2016			2:00	30.00

Buttons: Select Labor, Select Planned Labor, New Row

2

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.

Labor

Task: [ ] \* Labor: TJONES >> Tom Jones Approved?

Details

\* Craft: CONTRACTC >> \* Start Date: [ ]  
Skill Level: [ ] Start Time: [ ]  
\* Regular Hours: [ ] \* Rate: [ ]


Outside Labor Premium Pay


Outside?  Premium Pay Code: [ ]  
Vendor: [ ] >> Premium Pay Hours: [ ]  
Contract: [ ] >> Premium Pay Rate: [ ]  
Revision: [ ] Premium Rate Type: [ ] Asset: [ ] >>  
Memo: [ ]  
Recorded as Received: [ ]

Buttons: Select Labor, Select Planned Labor, New Row



# Work Type Field Assistant Buttons







\* Work Type:  

Work Subtype:  

1

1. 'Select Value' displays a list of selectable data items.

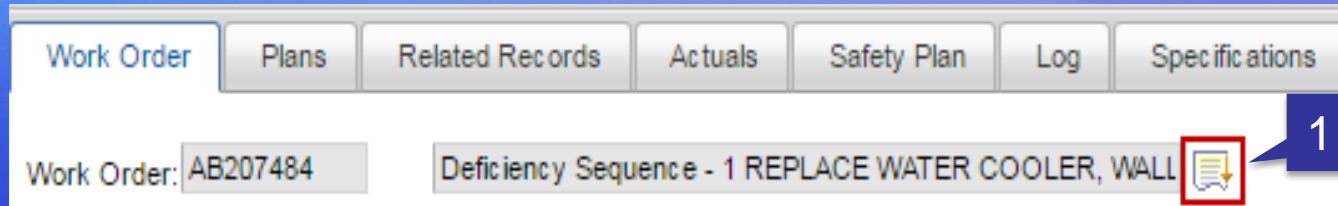
Work Type

Filter >     1 - 4 of 4  Download 

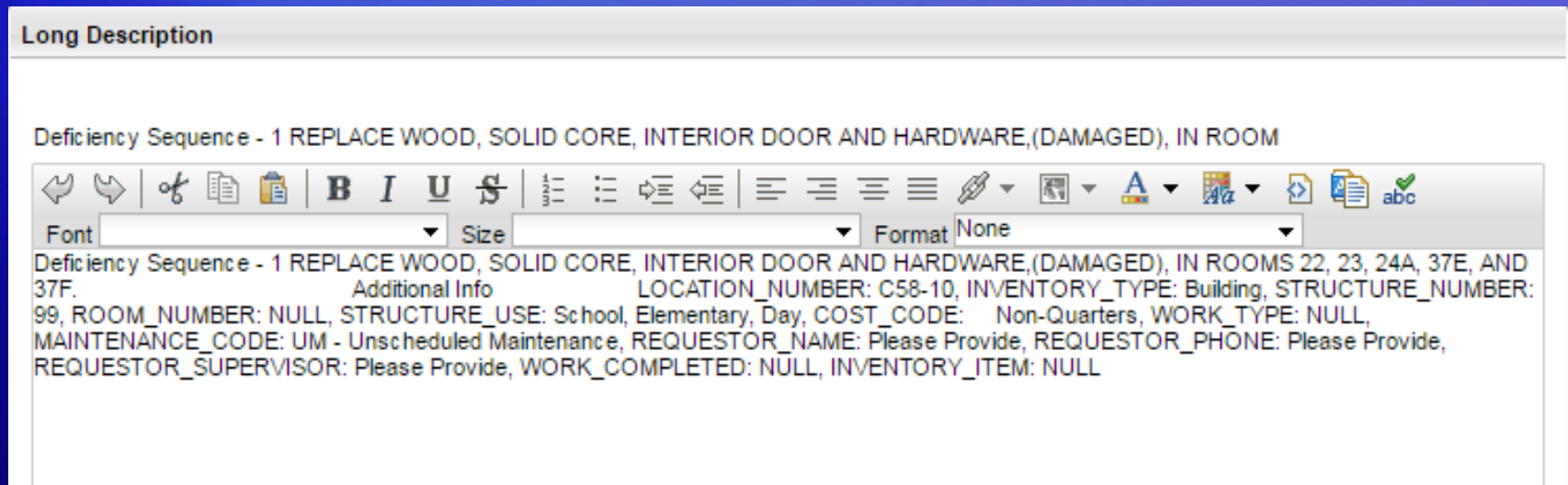
<u>Type</u>	<u>Description</u>	<u>Organization</u>
<u>CI</u>	<u>Capital Improvement</u>	<u>OFMC</u>
<u>FM</u>	<u>Facility Maintenance</u>	<u>OFMC</u>
<u>FO</u>	<u>Facility Operations</u>	<u>OFMC</u>
<u>PM</u>	<u>Preventive Maintenance</u>	<u>OFMC</u>

Cancel


# Field Assistant Buttons




1. 'Long Description' icon. Displays the hidden long description dialog box.



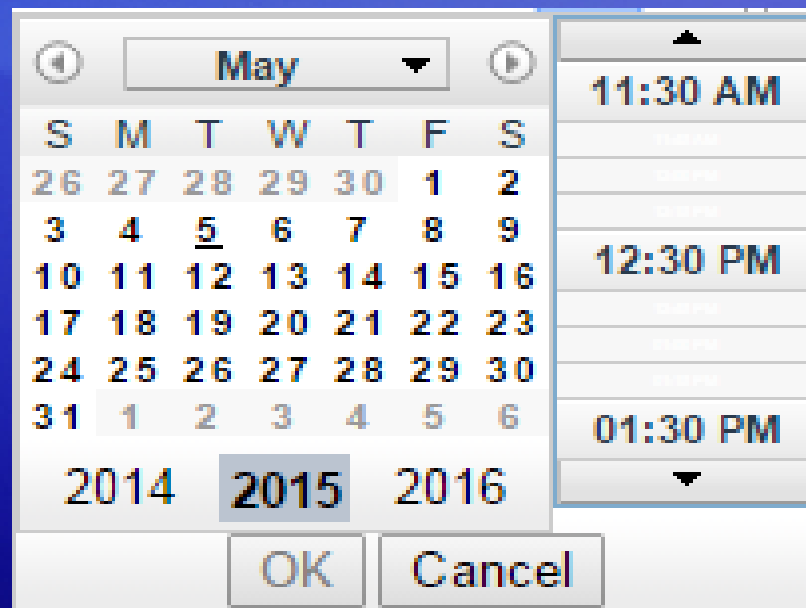
# Schedule Start Field Assistant Buttons

Scheduled Start:  

Scheduled Finish:  

1

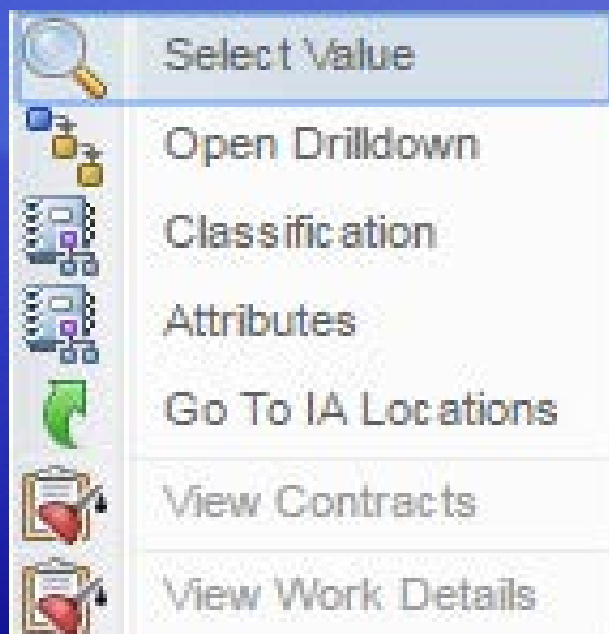
1. 'Select Date' icon displays a Select Date window containing a calendar



# Detail Menu Field Assistant Buttons

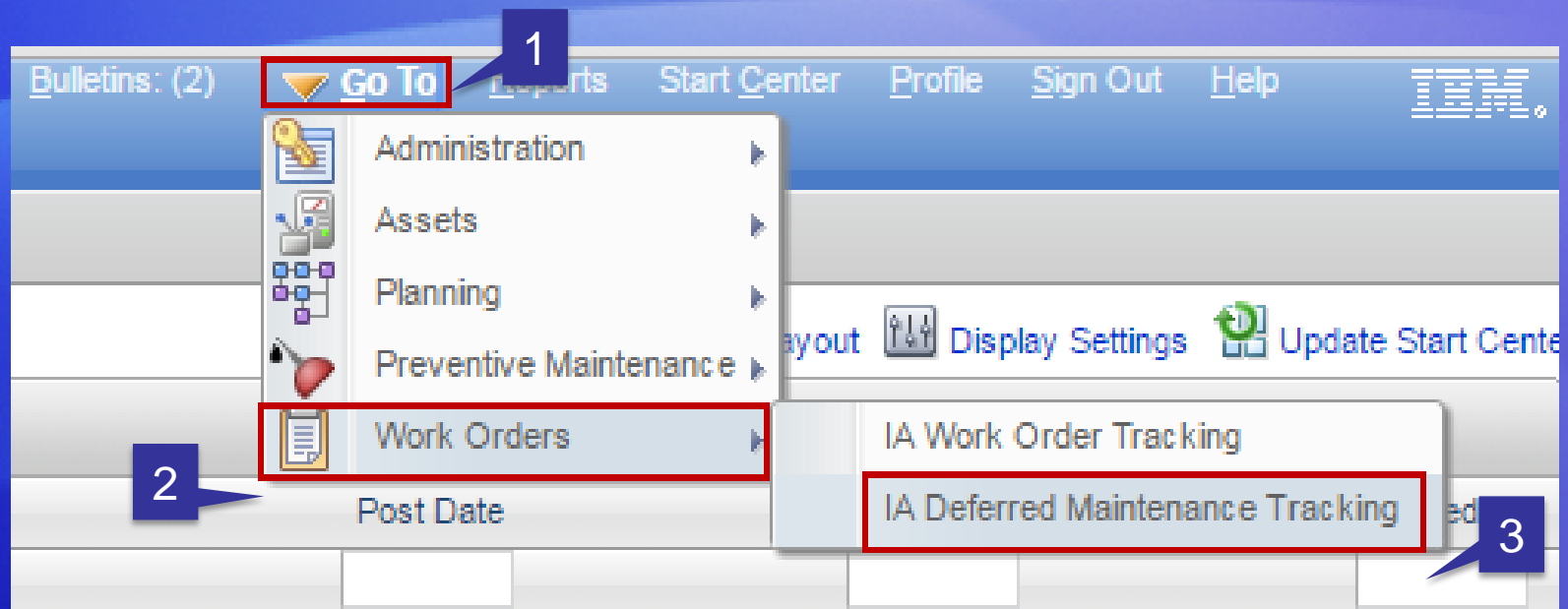


1. Detail Menu Button displays a drop-down menu of options for sources of data.





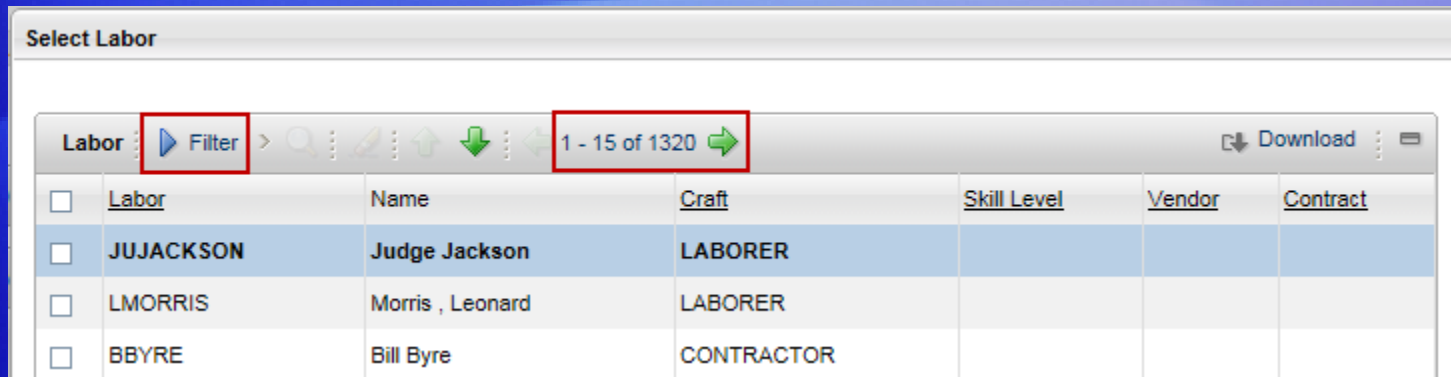
# Navigating Between Applications



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'.

# Field Assistant Buttons

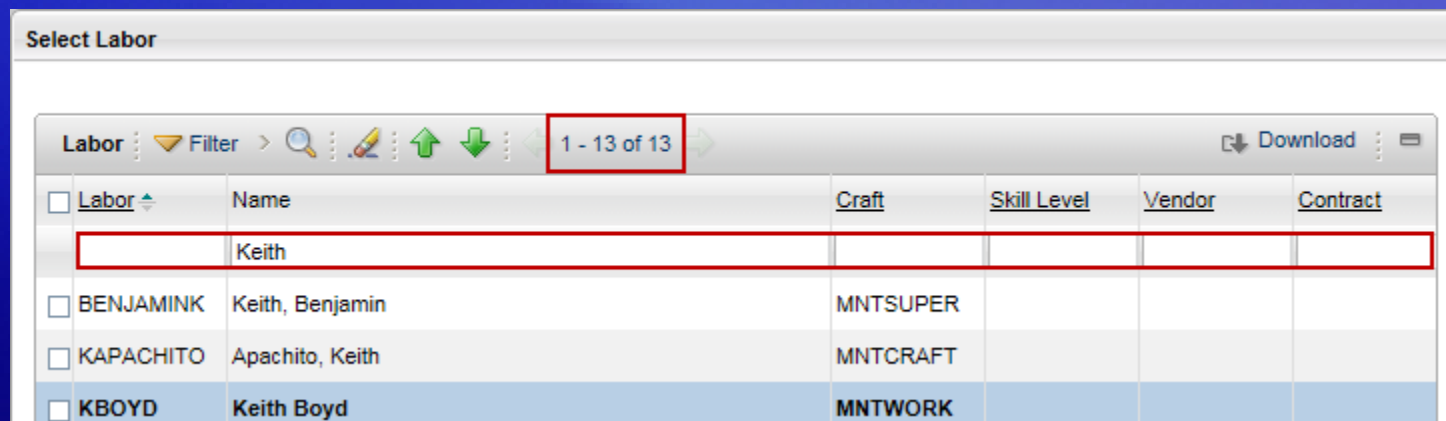


The screenshot shows the 'Select Labor' interface. At the top, there is a 'Labor' dropdown menu and a 'Filter' button, both highlighted with red boxes. To the right of the 'Filter' button is a search icon and a pagination indicator '1 - 15 of 1320' with a right arrow, also highlighted with a red box. Further right is a 'Download' button. Below this is a table with columns: Labor, Name, Craft, Skill Level, Vendor, and Contract. The table contains three rows of data.

<input type="checkbox"/>	<u>Labor</u>	<u>Name</u>	<u>Craft</u>	<u>Skill Level</u>	<u>Vendor</u>	<u>Contract</u>
<input type="checkbox"/>	JUJACKSON	Judge Jackson	LABORER			
<input type="checkbox"/>	LMORRIS	Morris , Leonard	LABORER			
<input type="checkbox"/>	BBYRE	Bill Byre	CONTRACTOR			



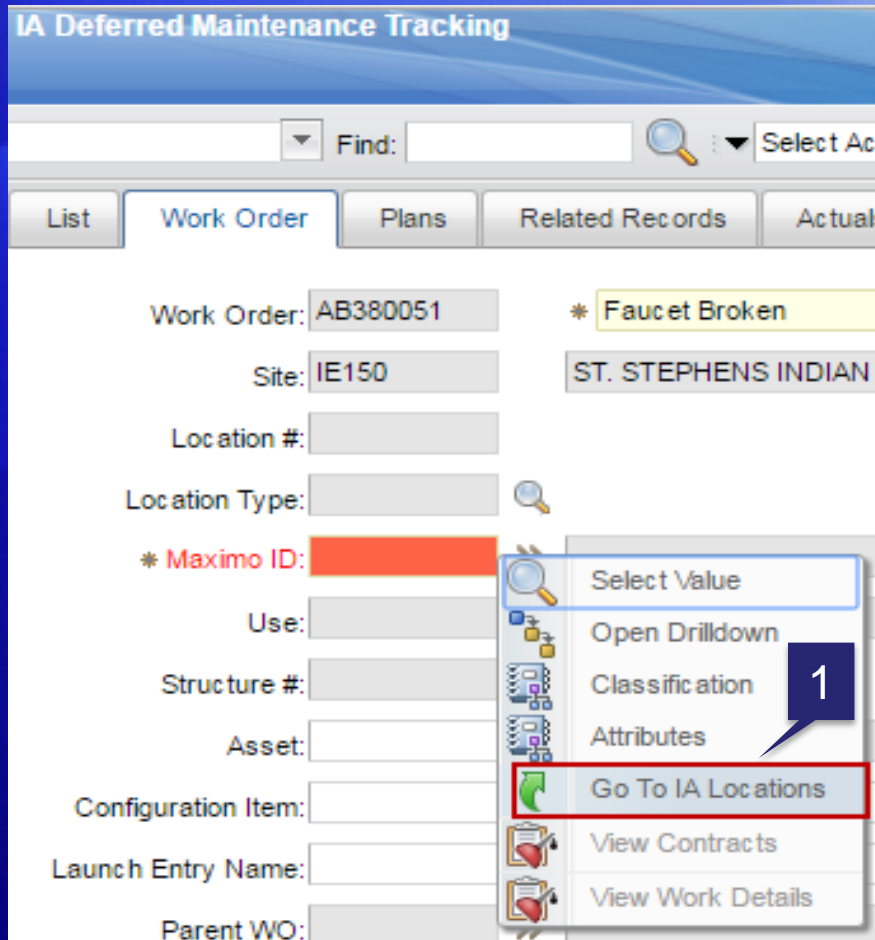
1. The Filter icon allows a user to search a list of values using words or numbers.



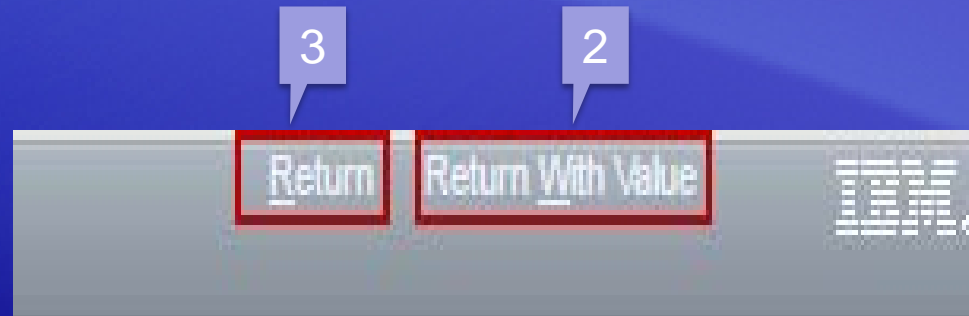
The screenshot shows the 'Select Labor' interface after a search. The 'Filter' button is now a dropdown menu. The pagination indicator shows '1 - 13 of 13'. A red box highlights the first row of the table, which contains the name 'Keith'.

<input type="checkbox"/>	<u>Labor</u>	<u>Name</u>	<u>Craft</u>	<u>Skill Level</u>	<u>Vendor</u>	<u>Contract</u>
<input type="checkbox"/>		Keith				
<input type="checkbox"/>	BENJAMINK	Keith, Benjamin	MNTSUPER			
<input type="checkbox"/>	KAPACHITO	Apachito, Keith	MNTCRAFT			
<input type="checkbox"/>	KBOYD	Keith Boyd	MNTWORK			

# Select Value and Return with Value



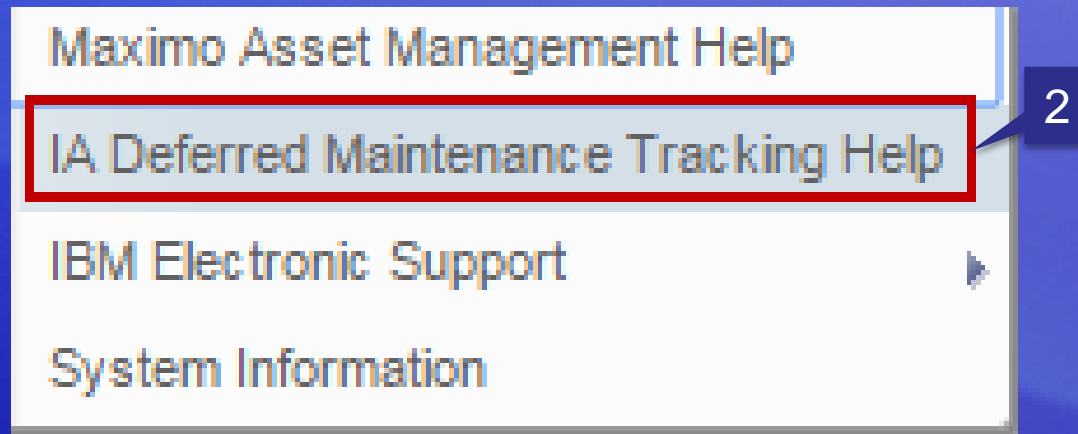
1. Upon selecting 'Go To IA Locations' the user will be taken to that application.
2. After selecting a record in the 'IA Locations' app. The user will select 'Return with Value'. This will return the selected value back to the 'Maximo ID' field.
3. If the user does not find the value they are looking for then the user would select 'Return'. This will take the user back to the 'Maximo ID' field with no value.



# Maximo Help Menu



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.

# Start Center Help

Information center

Search:  **GO** [Search scope:](#) All topics

**Contents** 

- ▣  Assets module
- ▣  Change module
- ▣  Contracts module
- ▣  Financial module
- ▣  Integration module
- ▣  Inventory module
- ▣  IT Infrastructure module
- ▣  Planning module
- ▣  Preventive Maintenance module
- ▣  Purchasing module
- ▣  Release module
- ▣  Security module
- ▣  Self Service module
- ▣  Service Desk module
- ▣  Service Level module
- ▣  System Configuration module
- ▣  Task Management module
- ▣  Work Orders module
  - ▣  **Work Order Tracking application**
  - ▣  Labor Reporting application
  - ▣  Quick Reporting application
  - ▣  Assignment Manager application
  - ▣  Service Requests 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.

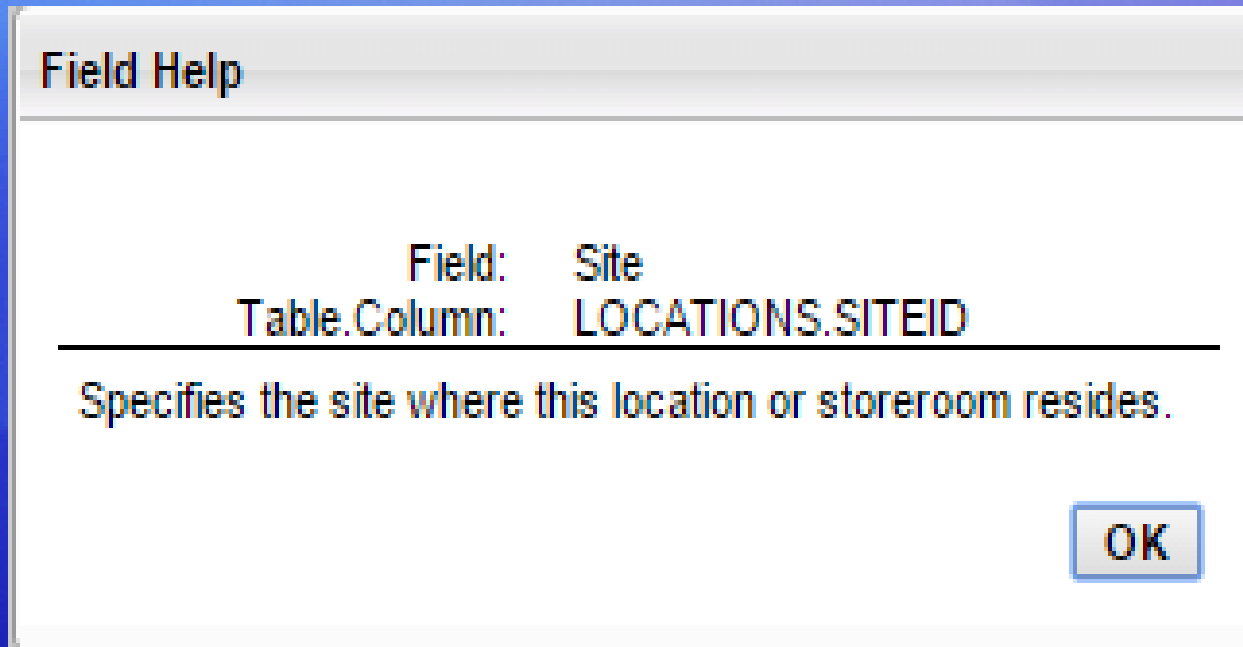
[Working with work orders](#)  
Work orders initiate the maintenance process and create a historical record of the work that is performed.

**Related concepts:**  
[Working remotely with Maximo Everyplace](#)

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[Feedback](#)

# Field Help



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.

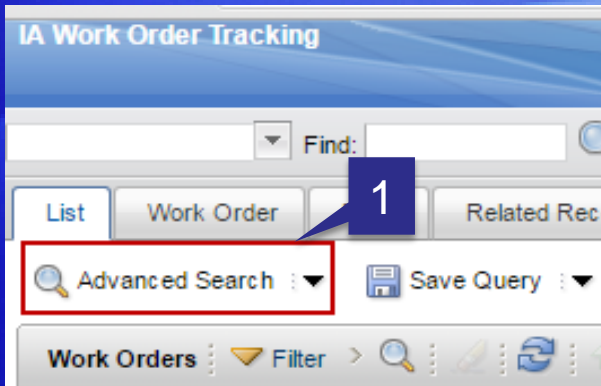
# Searching for Records – List Tab

The screenshot displays the 'IA Assets' application interface. At the top, there is a navigation bar with 'IA Assets' on the left and 'Bulletins: (1)', 'Go To', 'Reports', 'Start Center', and 'Profile' on the right. Below this is a toolbar with a 'Find:' search box and a 'Select Action' dropdown. A blue callout box with the number '1' points to the 'Find:' search box. Below the toolbar is a tabbed interface with 'List', 'Asset', 'Spare Parts', 'Safety', and 'Meters' tabs. The 'List' tab is active. Below the tabs is an 'Advanced Search' section with a 'Save Query' dropdown and 'Bookmarks' link. A blue callout box with the number '2' points to the 'Filter' section. The 'Filter' section contains several search fields: 'Asset', 'Description', 'Maximo ID', 'Location Type', 'Structure #', 'Location #', 'Room #', and 'Parent'. Each field is enclosed in a red box. Below the filter fields is a text box with the following instructions: 'To find records, use the filter fields and then press Enter. For more search options, use the Advanced Search button. To enter a new record, select the Insert icon in the toolbar.'

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 it 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.



# Searching for Records - Advanced Search



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.

The screenshot shows the 'More Search Fields' pop-up window. The title bar reads 'More Search Fields | Current Query:'. The window contains a grid of search fields with input boxes and search icons. A blue callout bubble with the number '2' points to the title bar.

More Search Fields   Current Query:		
Work Order: <input type="text"/>	Problem Code: <input type="text"/> 🔍	Work Type: <input type="text"/> 🔍
Description: <input type="text"/>	Failure Class: <input type="text"/> >>	Status: <input type="text"/> 🔍
Parent WO: <input type="text"/> >>	Service Group: <input type="text"/> >>	Class: =WORKORDE 🔍
Maximo ID: <input type="text"/> >>	Service: <input type="text"/> 🔍	Site: <input type="text"/> 🔍
Search Location Hierarchy: <input type="text"/> >>	Vendor: <input type="text"/> >>	History? N 🔍
Structure #: <input type="text"/>	Originating Record: <input type="text"/> >>	Priority: <input type="text"/>
Room #: <input type="text"/>	Originating Record Class: <input type="text"/> 🔍	Is Task? N 🔍
Location #: <input type="text"/>	Risk Assessment: <input type="text"/>	Category: <input type="text"/> 🔍

# 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

# Saved Queries

IA Work Order Tracking Bulletins: (2) [Go To](#) [Reports](#) [Start Center](#)

Find:  Select Action

List Work Order Plans Related Records Actuals Safety Plan Log Specifications

Advanced Search Save Query Bookmarks

Work Orders Filter 1 - 20 of 66

Work Order	Description	Structure #	Room #	Maximo ID	Location Type	Work Type	Status
		1001			=1100	=FM	
<a href="#">AB186929</a>	Daily systems check-Check heat system to see its working properly, check building for any	1001		AB100585	1100	FM	APPR
<a href="#">AB187145</a>	PM 0847101950 Fan, axial, up to 5,000 CFM 1 Start and stop fan with local switch. 2	1001		AB104588	1100	FM	APPR
<a href="#">AB187389</a>	Requested to perform daily systems check Additional	1001		AB100585	1100	FM	APPR
<a href="#">AB189125</a>	PM 0461101950 Exterior door and hardware - routine preventive maintenance 1 Pick up	1001		AB104588	1100	FM	APPR

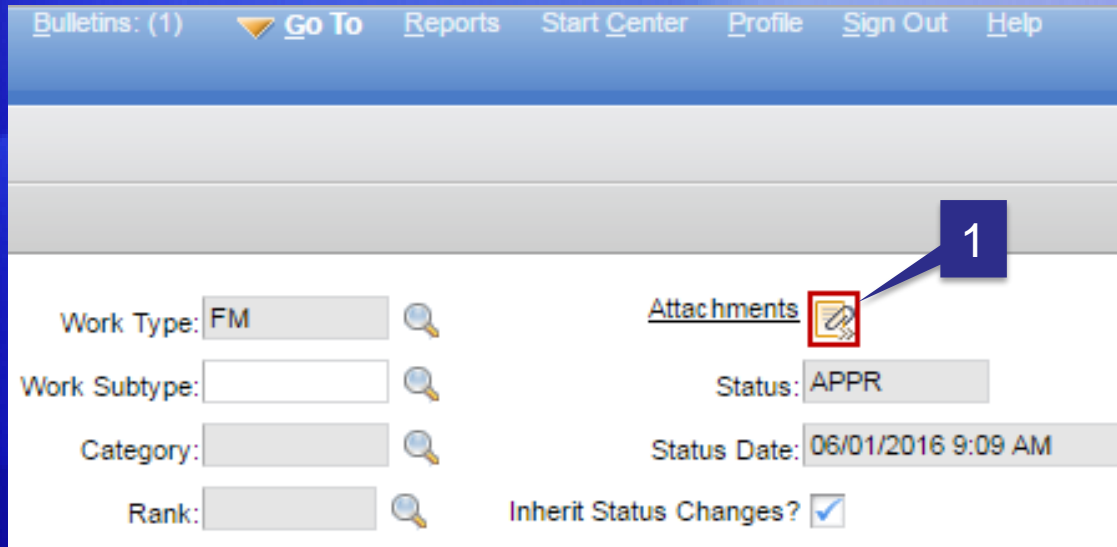
1. Once a user has performed a search for records and decides to save the search it can be saved for future use by creating a 'Saved Query'
2. To save a query select 'Saved Query'.

# Saved Queries

The screenshot shows a dialog box titled "Save Current Query". It contains two text input fields, both containing the text "\* Query Name: My Query". Below the first field are two checkboxes: "Public?" and "Default?". At the bottom right are "OK" and "Cancel" buttons. Six numbered callouts (1-6) point to the following elements: 1. The first text input field. 2. The second text input field. 3. The "Public?" checkbox. 4. The "Default?" checkbox. 5. The space between the two checkboxes. 6. The "OK" button.

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 user 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.

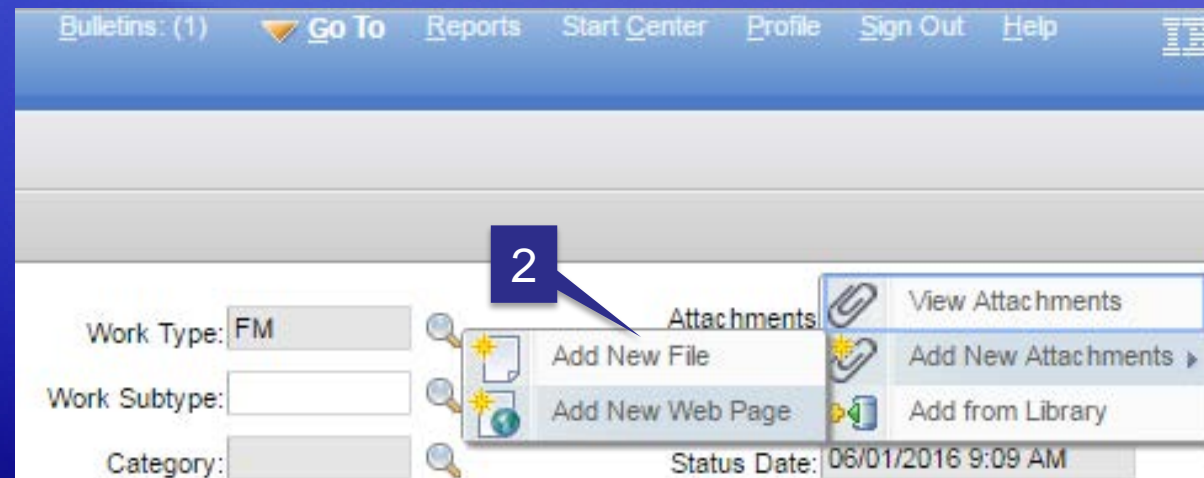
# Attached Documents



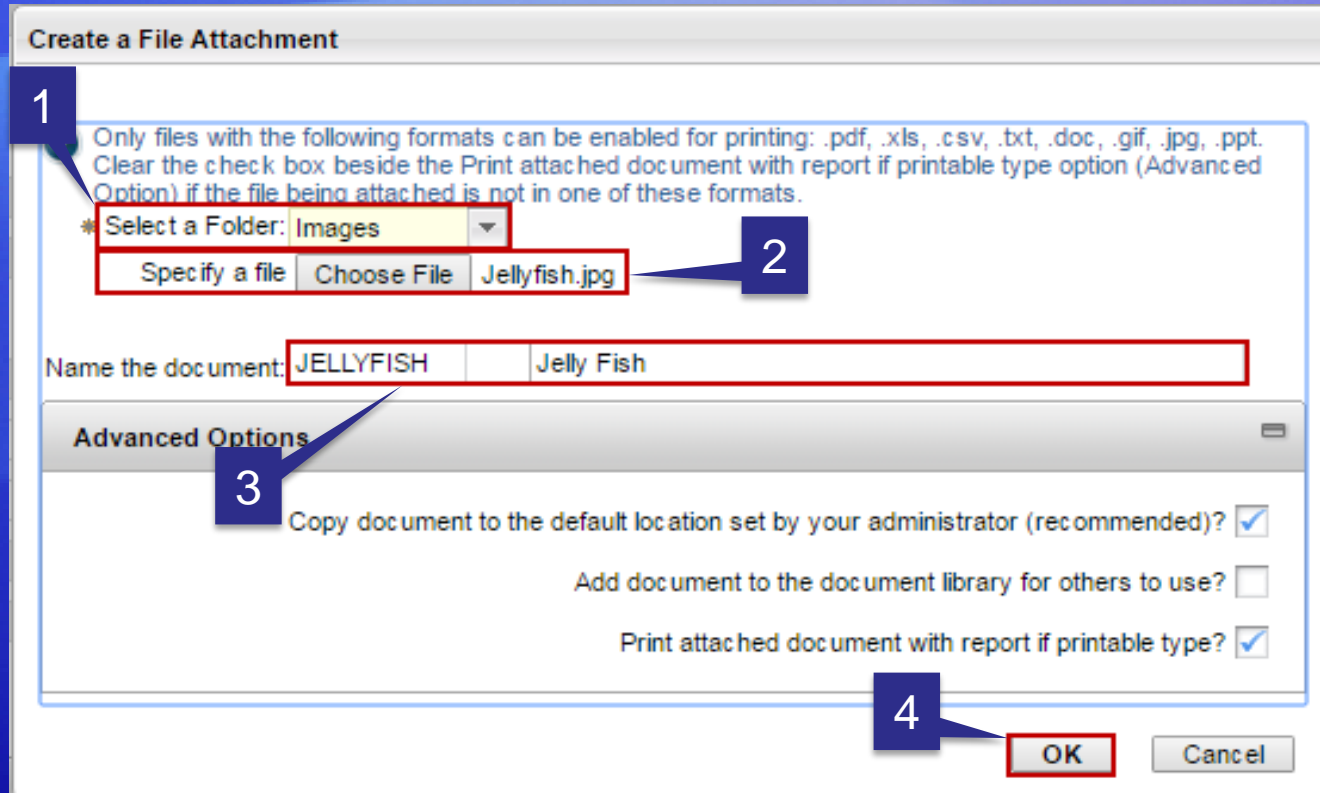
Attachments allow users to attach a document such as a: PDF, JPEG, Work Doc. as well as web pages to a individual record.

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 an new record.



# Attached Documents – Adding a Document



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

# Attached Documents – Viewing a Document

Work Type:

Work Subtype:

Category:

Rank:

Status:

Status Date:

Inherit Status Changes?

**1** **Attachments**

1. Click on the word 'Attachments'
2. The menu below will appear. Then select the record you would like to view.

**View Attachments**

Filter > 1 - 8 of 8 Download

Document	Description	Document Folder	Document Version	Print?	Application		
<a href="#">JPG</a>	Elementary Day School	Attachments		<input checked="" type="checkbox"/>	LOCATIONS		
<a href="#">PDF</a>	School, Elementary, Day - First Floor	Attachments		<input checked="" type="checkbox"/>	LOCATIONS		
<a href="#">PDF</a>	School, Elementary, Day - Second Floor	Attachments		<input checked="" type="checkbox"/>	LOCATIONS		
<a href="#">C58-10 99 S.JPG</a>	School, Elementary, Day - South View	Attachments		<input checked="" type="checkbox"/>	LOCATIONS		
<a href="#">C58-10 99 W.JPG</a>	School, Elementary, Day - West View	Attachments		<input checked="" type="checkbox"/>	LOCATIONS		
<a href="#">C58-10 99 E.JPG</a>	School, Elementary, Day - East View	Attachments		<input checked="" type="checkbox"/>	LOCATIONS		
<a href="#">C58-10 99 N.JPG</a>	School, Elementary, Day - North View	Attachments		<input checked="" type="checkbox"/>	LOCATIONS		
<a href="#">JELLYFISH</a>	Jelly Fish	Images		<input checked="" type="checkbox"/>	WORKORDER		

**2**

OK



# Bookmarks – Bookmarking a record

The screenshot shows the IA Assets application interface. At the top, there is a navigation bar with 'IA Assets' on the left and 'Bulletins: (1)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help' on the right. Below the navigation bar is a search and action bar with a 'Find:' field, a 'Select Action' dropdown, and several icons. A menu bar contains 'List', 'Asset', 'Spare Parts', 'Safety', and 'Meters'. Below the menu bar is another search and action bar with 'Advanced Search', 'Save Query', and a 'Bookmarks' button highlighted with a red box. The main content area is a table of assets. The table has columns for 'Asset', 'Description', 'Maximo ID', 'Location Type', 'Structure #', 'Location #', 'Room #', 'Parent', and 'Site'. The first row of the table is highlighted in blue and has a blue callout box with the number '1' pointing to a bookmark icon in the rightmost column. The bookmark icon is a green arrow pointing right with a plus sign. The table contains the following data:

Asset	Description	Maximo ID	Location Type	Structure #	Location #	Room #	Parent	Site
AB104244	Transformer, Dry, Single-Phase	AB131784	1150	90	C51-01	10		IA001
AB104245	Transformer, Dry, Single-Phase	AB131786	1150	90	C51-01	12		IA001
AB104246	Transformer, Dry, Single-Phase	AB131796	1150	90	C51-01	22		IA001
AB104247	Transformer, Dry, Single-Phase	AB131777	1150	90	C51-01	3		IA001
AB104297	Transformer, Dry, Single-Phase	AB107740	1100	1330	N35-01			IA004
AB104298	Transformer, Dry, Single-Phase	AB104252	1100	8	N35-01			IA004
AB104322	Transformer, Dry, Single-Phase	AB105381	1100	82A	P03-01			IA008
AB104334	Transformer, Dry, Three-Phase	AB133406	1150	2	C52-01	B35		IA009

‘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.

# Bookmarks – Viewing a Bookmarked record

The screenshot shows the IA-FMS interface. At the top, there is a navigation bar with 'IA Assets' on the left and 'Bulletins: (1)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help' on the right. Below this is a toolbar with a 'Find' field and a 'Select Action' dropdown. A red box highlights the 'Bookmarks' tab, with a blue arrow labeled '1' pointing to it. Below the toolbar is a search bar with 'Advanced Search' and 'Save Query' options. The main area displays a table of assets. A blue arrow labeled '2' points to the 'Asset' column header. A 'My Bookmarks' dialog box is open, showing a list of bookmarked records. A blue arrow labeled '3' points to a disposal icon (a red 'X' in a square) next to the record with ID 'AB104244'. The dialog box has an 'OK' button at the bottom right.

Asset	Description	Maximo ID	Location Type	Structure #	Location #	Room #	Parent	Site
AB104244	Transformer, Dry, Single-Phase							IA001
AB104245	Transformer, Dry, Single-Phase							IA001
AB104246	Transformer, Dry, Single-Phase							IA001
AB104247	Transformer, Dry, Single-Phase							IA001
AB104297	Transformer, Dry, Single-Phase							IA004
AB104298	Transformer, Dry, Single-Phase							IA004
AB104322	Transformer, Dry, Single-Phase							IA008

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**