

# Overview and Navigation Training Manual

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Maximo Production URL: <https://maximo.bia.gov/maximo>

Maximo Training URL: <https://maximotrng.bia.gov/maximo>

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# 1 Indian Affairs-Facility Management Process (IA-FMS) Training

## 1.1 Training Goals and Objectives

This training course is designed to enhance the student's understanding of IA-FMS. It is not intended to provide a comprehensive overview of the Division of Facilities Management and Construction (DFMC) asset management business practices or specific business related activities as there will always be anomalies that cannot be accounted. Rather, the primary goal for the course is to ensure users have a solid foundation and familiarity with the IA-FMS and a basic knowledge of the asset management process so that students will function as subject matter experts (SME) to others at their respective locations. When students have completed this training session, they will be able to:

- Understand the IA Asset Management Process
- Request application privileges in BIA User Management Portal (BUMP)
- Use Maximo — Navigation, Locations, Assets, Work Orders
- Understand the Asset Priority Index (API) and Web Current Replacement Value (WebCRV) applications
- Use Safety and Condition Assessment Portal (S&CAP)
- Use Budget and Project Execution, Ranking and Management (BPERM)
- Understand the relationship between IA-FMS, Financial Business Management System (FBMS), and FRPP
- Understand the relationship among all the applications in the IA-FMS suite

## 1.2 Section Objectives

After completing this section of the training, the student will be able to:

- Understand the implementation of the IA Asset Management Process
- Understand the history of IA-FMS
- Understand the purpose and use of the IA-FMS in the Asset Management Process
- Understand the relationship between all applications within IA-FMS

## 2 History of IA-FMS

The Indian Affairs (IA) Division of Facilities Management and Construction (DFMC) is responsible for the administration and management of a large, geographically distributed real property portfolio. For over ten years, the entire IA asset portfolio overseen by DFMC was managed in the Facilities Management Information System (FMIS). FMIS served as the primary system of record for facilities, work, and asset management activities – augmenting the system of record for IA real property [Federal Finance System (FFS) replaced by Financial Business Management System (FBMS)]. The system encompassed all applications, hardware, software, network components, management work streams and efforts required to support the DFMC asset management life cycle’s business processes, program goals, and objectives.

In Fiscal Year 2013, in conjunction with the FBMS deployment, the Department of Interior (DOI) mandated IA to transition from FMIS to the DOI standard asset management system – International Business Machines (IBM) Maximo. To meet the baseline requirements of FBMS within the constrained timeline, IA made the decision to deploy a core subset of the FMIS business processes and system functionality into the initial, Phase I Maximo configuration. IA decided to leave certain, advanced system functionality and business processes in the Facility Management Information System (FMIS) during the initial role out. An interface existed between FMIS and the new IA-FMS to help ensure the two systems stayed in sync. Since the Phase I deployment, any functionality that remained in FMIS has been developed as additional applications in the IA-FMS suite (i.e., S&CAP, BPERM, API, CRV and WORK). As a result, FMIS was retired in July of 2015.

## 3 The IA-FMS Suite

IA-FMS is a suite of applications that provides asset management functions to IA. As shown in the following graphic, the core of IA-FMS is IBM’s Maximo. This tool is known for its capabilities and provides comprehensive functionality in the various aspects of asset management for the locations, regions, and Central Office of IA. To provide the detail needed in IA’s implementation, applications have been added that work specifically to IA workflows.

With the upgrade to the newer version of Maximo, a complete suite of integrated business applications is now available. The interfaces between IA-FMS applications and functionality are shown in the graphic on the following pages and the applications themselves are explained in further detail in the following subsections.



### 3.1 BIA User Management Portal (BUMP)

BUMP is a web portal for managing user access to IA web applications and for configuring application user roles. BUMP is used to request user roles to the IA-FMS web applications. User roles must be approved before users can log into the applications with the requested roles.

### 3.2 Safety and Condition Assessment Portal (S&CAP)

S&CAP enables users to request and subsequently document the results of several types of inspections and facility condition assessments. The results are finalized and either the current data is updated or new records are created in IA-FMS (Maximo). Approved users also have the ability to generate mandated and ad hoc reports.

### 3.3 Budget and Project Execution, Ranking and Management (BPERM)

BPERM is a Maximo-based application that supports IA personnel with work related to planning, budgeting, and project management. BPERM enables users to create projects with single or multiple work orders; rank projects using IA and DOI scoring algorithms; track deliverables and status for five-year plans; develop budgets for projects to request funding; and define and track appropriation amounts.

### 3.4 Asset Priority Index (API)

The API application provides a worksheet to determine the API of locations (e.g., facilities including buildings, towers, and tanks). API measures the facility's importance to the mission of a site to ensure that its capital asset investments are made as efficiently as possible. IA uses API to assist in determining funding priorities for construction, maintenance, and repair or rehabilitation to improve the condition of high priority facilities, including instituting performance measurements to monitor progress in addressing reduction of the deferred maintenance work orders. The API application maintains data entered on the API worksheets during the approval process for each location record and is updated annually.

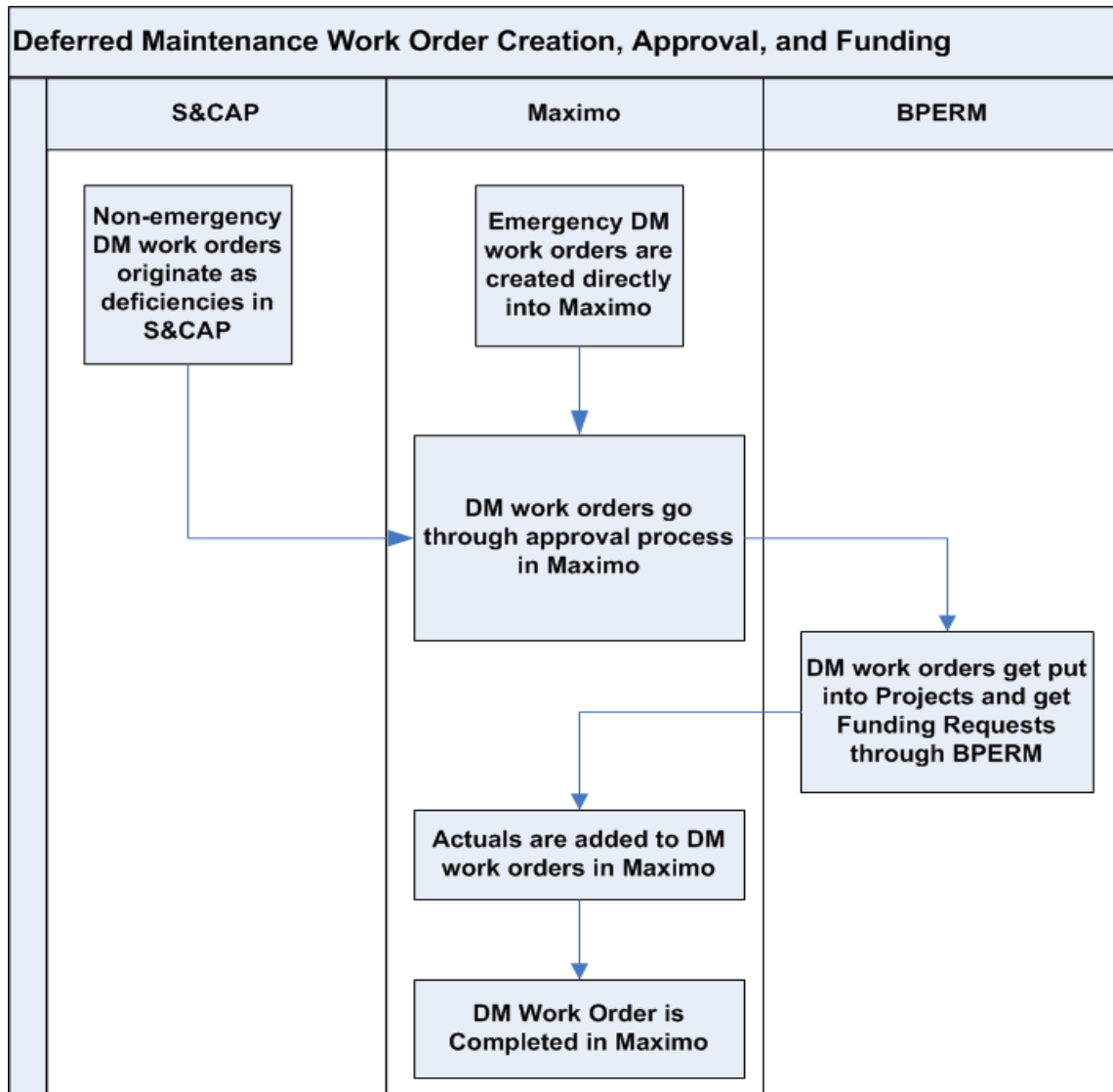
### 3.5 Web Current Replacement Value (WebCRV)

The WebCRV application enables users to calculate the Current Replacement Value (CRV) of locations. It allows authorized users to review, calculate, and approve CRVs. This app will maintain all data entered into the CRV calculator, as well as the approval status and comments for each CRV record and is updated annually.



### 3.6 Overall Deferred Maintenance Work Order Process

The diagram below outlines the overall process for a Deferred Maintenance Work Order in IA-FMS at a high level. The diagram shows how multiple IA-FMS applications have a role in the beginning-to-end process.



### 3.7 IA-FMS Terminology

As part of the transition from FMIS to IA-FMS it is imperative that users understand the commonalities as well as the difference in terminology between them as well as how those terms interface with FBMS. The following chart explains those differences.

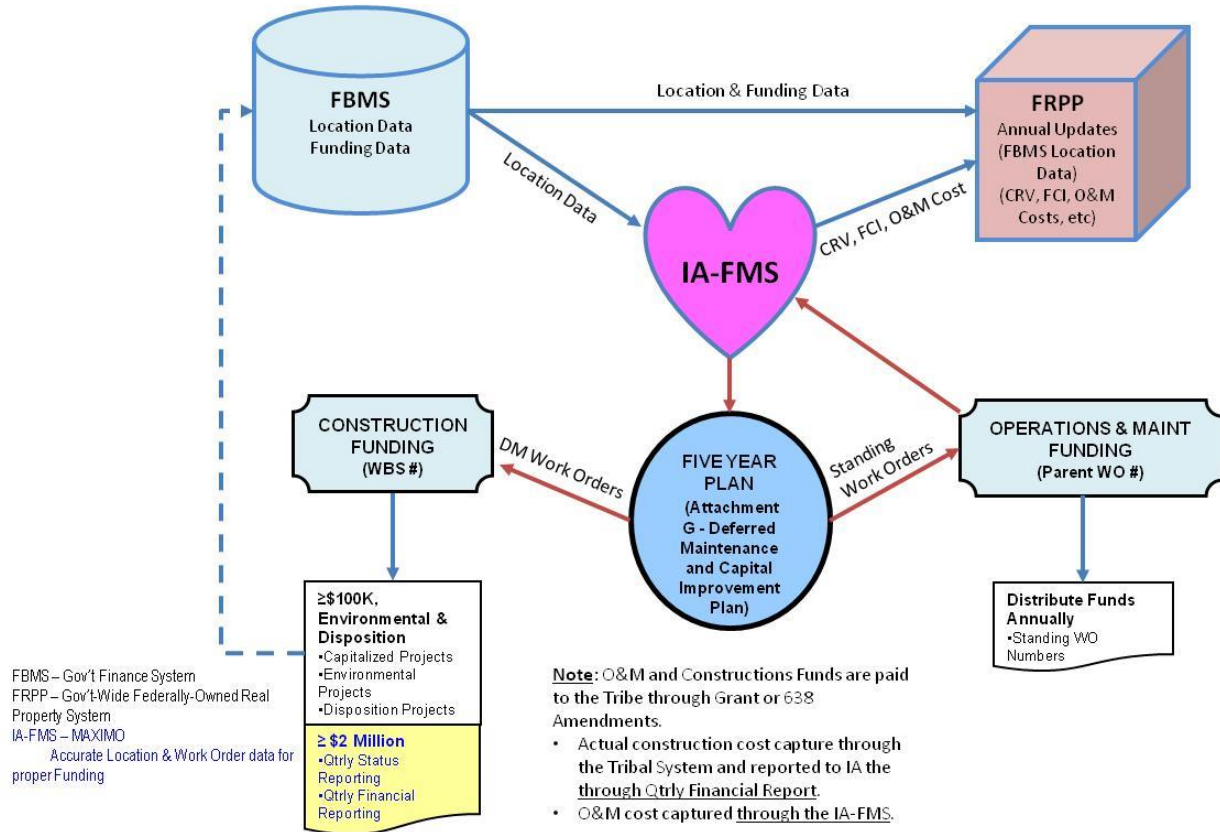
FMIS	IA-FMS	FBMS
<b>Location</b>	<b>Site</b>	<b>Business Entity</b>
<b>Building Detail</b> <b>Room Detail</b> <b>Tower Detail</b> <b>Tank Detail</b> <b>Grounds Detail</b>	<b>Locations</b>	<b>Buildings/Assets</b>
<b>Inventory</b>	<b>Assets</b>	
<b>Work Tickets</b>	<b>O&amp;M Work Orders</b> <b>Standing Parent Work Orders</b>	<b>Standing Parent Work Orders</b>
<b>Backlogs</b>	<b>DM Work Orders</b>	<b>Work Orders</b>
<b>Technologies</b>	<b>Job Plans</b>	

## 4 The IA Asset Management Process

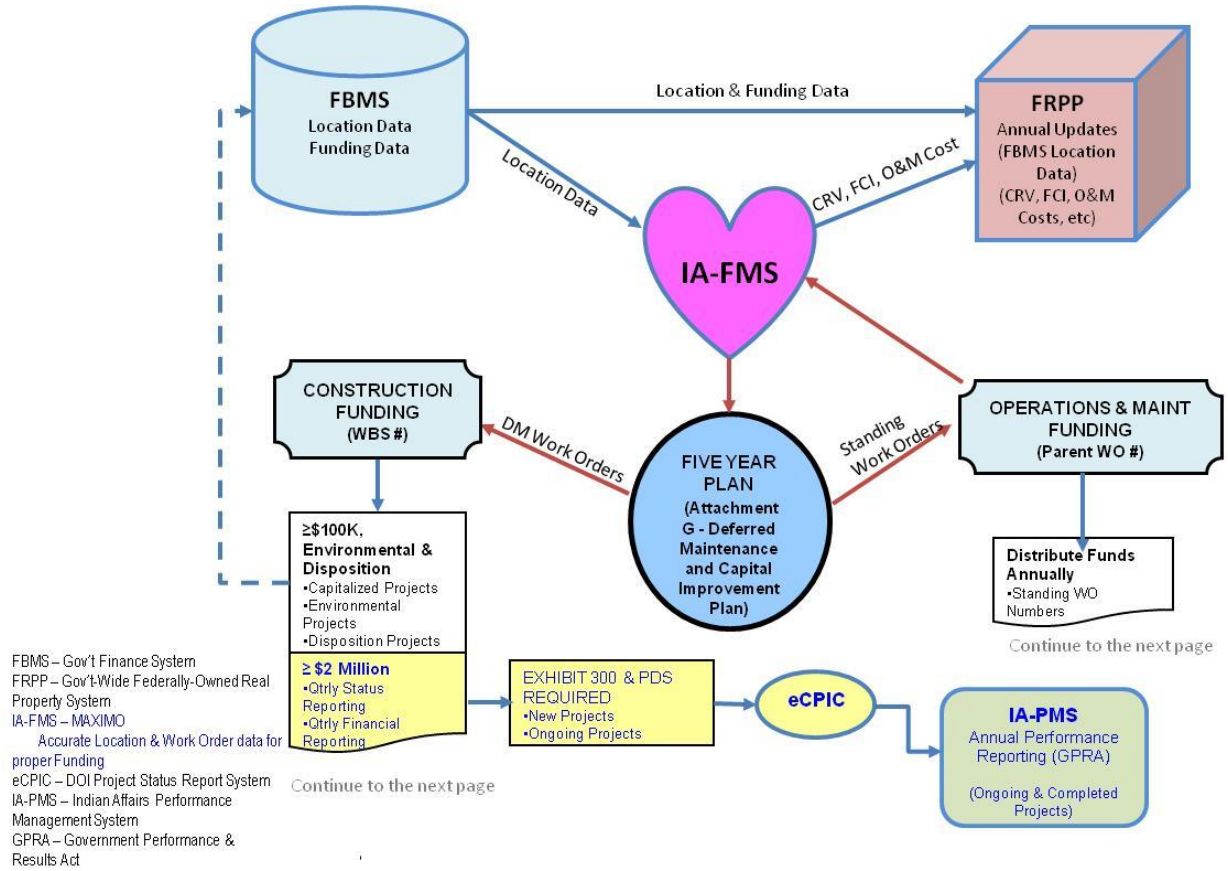
IA-FMS is the heart of IA’s asset management business process for IA employees as well as Tribal organizations. Five-Year Deferred Maintenance (DM) and Capital Investment (CI) Plans are developed based on IA-FMS data. The priorities for these items will be developed from IA-FMS (BPERM); however, the funding will be allocated through FBMS. These plans determine the amount of funding received.

For Capitalized, Asbestos, and Disposition project types that are \$2 million or more, updates are required in FBMS and quarterly reporting is done to the Department of Interior via eCPIC. Additionally, quarterly project and performance reporting is done through IA-PMS and FRPP. The President’s Budget Office, Office of Management and Budget (OMB), uses FRPP to determine funding need for IA so annual updates on conditions are required for all federally-owned locations.

For Tribal organizations, IA-FMS is used to properly allocate Construction funding and Operations and Maintenance (O&M) funding based on locations and work orders. The Construction funding requires a WBS number and account assignment. These updates are done in FBMS using the FBMS Entry Document (FED) document developed from IA-FMS (BPERM). For tribally managed projects, the actual expenditures are captured in the Tribal Finance System and reported to IA through quarterly financial reporting along with project status. O&M funding is based on a model of the actual costs for the campus and their locations. The costs are captured in IA-FMS (Maximo) through standing work orders. The accounting for these standing work orders are preloaded in FBMS for reconciliation and accounting.



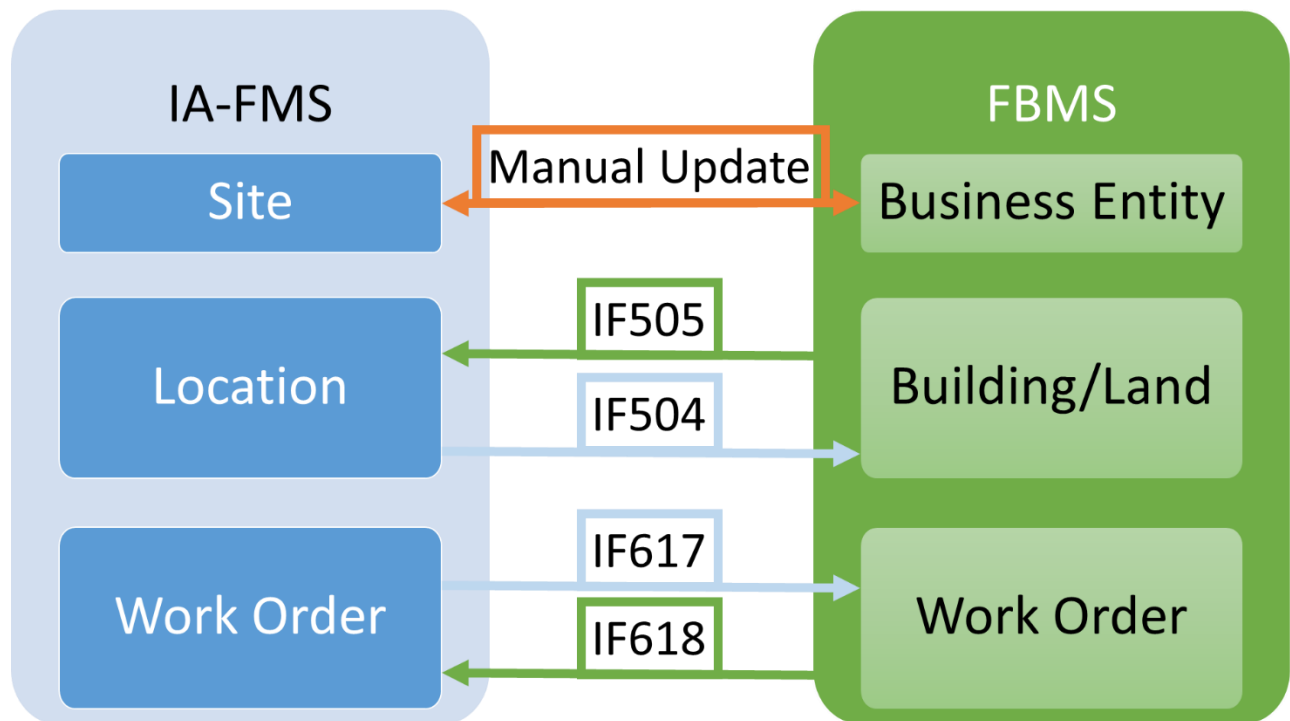
For sites managed by Federal employees, IA-FMS is used to properly allocate Construction funding and O&M funding based on locations and work orders. The Construction funding requires a WBS number and account assignment. These updates are done in FBMS using the FED document developed from IA-FMS (BPERM). For federally managed projects, the actual costs are captured in the FBMS. O&M costs are captured in Quick Time, FBMS, and IA-FMS (Maximo) through standing work orders. The accounting for these standing work orders are preloaded in FBMS for reconciliation and accounting.



## 5 IA-FMS and FBMS

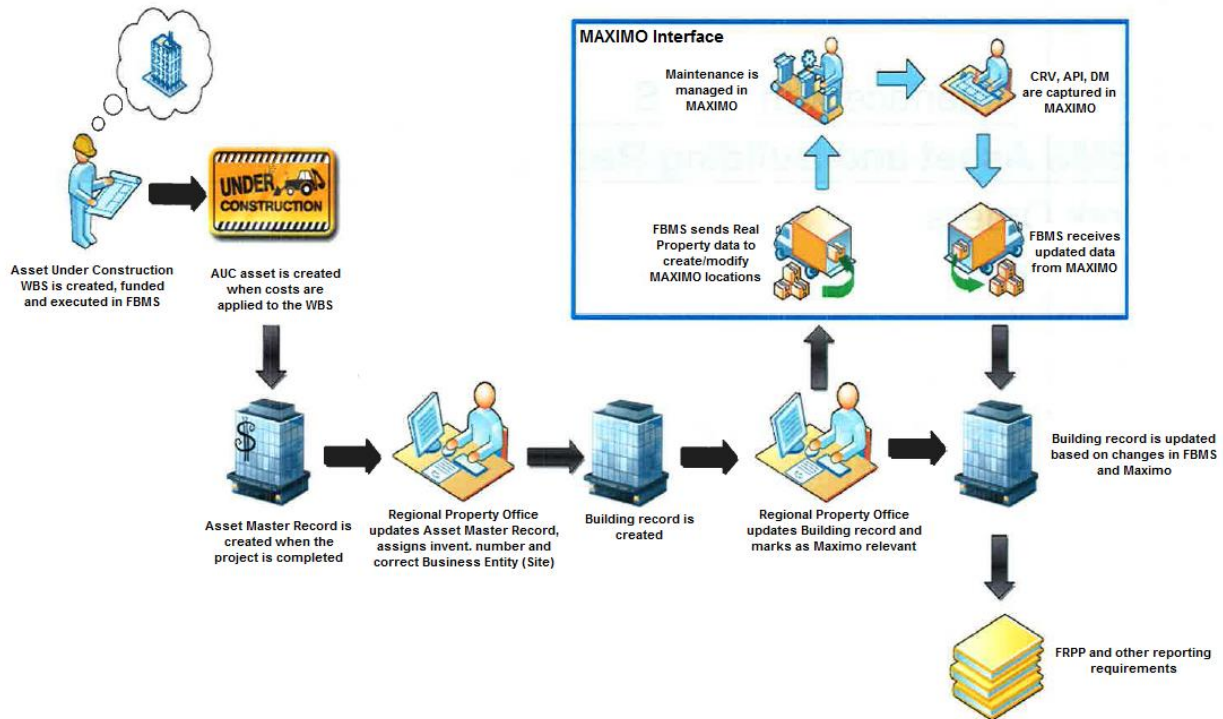
### 5.1 IA-FMS and FBMS Interfaces

FBMS is the authoritative system of record for fixed assets and real estate. The following graphic shows the interfaces between IA-FMS (Maximo) and FBMS. When a new Business Entity comes online, there is a manual update that is done between IA-FMS and FBMS. When new locations (building or land) come online, FBMS is the initiator of record creation in IA-FMS (Maximo). The new record is sent to IA-FMS through an hourly interface, called the IF505. As work orders are created against a location, IA-FMS is the initiator of record creation in FBMS. In both cases, these records have to have affirmative indicators of relevancy in the application (i.e., Maximo and FBMS, respectively) where the record should be passed.



## 5.2 New Location Creation between IA-FMS and FBMS

The following graphic shows the process between IA-FMS and FBMS on a new location creation. When the location is under construction, an asset under construction record is created, funded and executed in FBMS. Once, the construction is complete, an FBMS building record (which corresponds to the location record in IA-FMS) is created, marked as Maximo relevant, and sent to IA-FMS via the IF505 interface. The location record is imported into IA-FMS (Maximo) and all updates to the location happen in Maximo and data is passed between the two systems.




## 6 IA-FMS (Maximo) Overview and Logging In

To begin using the IA-FMS (Maximo) application, navigate to the application login page (below). The application link (URL), username, password, and instructions on how to access the training system are provided by your instructor. For the course, consult the specific instructions.

**Tivoli** software **IBM**

### Welcome to IA-FMS/DWP Maximo 7.5 Production



IA-FMS: Ph# 866-706-2011  
Email: [ia\\_maximo\\_helpdesk@dtec.com](mailto:ia_maximo_helpdesk@dtec.com)  
DWP: Ph# 720-484-3349  
Email: [ia\\_dwp\\_maximo@bia.gov](mailto:ia_dwp_maximo@bia.gov)

User Name:

Password:

- 1
- 2
- 3

How to Access the Application once the login screen appears (as shown above):

1. Enter your assigned **User Name**:
2. Enter your **Password**:
3. Click **Sign In**.

## 6.1 The Start Center

On each login to IA-FMS (Maximo) the user will be taken to the Start Center. The Start Center is designed to contain a 'snap shot' of information important to the user. You may return to this screen at any time while working in the IA-FMS (Maximo) system by clicking on the **Start Center** icon near the top right of the screen.

The Start Center can be thought of as the IA-FMS (Maximo) home page. On it you may find links to various actions, applications, data, records, and reports that are relevant to your job. The main features on the Start Center are:

1. **Navigation Bar** (in Blue): Is visible from all applications. It allows the user to navigate to specific sections within Maximo (i.e. Applications, Reports, Start Center, and Profile).
2. **Favorite Applications:** This feature on your Start Center displays the applications that you use frequently. Clicking an application on the list takes you directly to the application.

The screenshot shows the IA-FMS (Maximo) Start Center interface. The top navigation bar (1) includes 'Welcome, Trainer', 'Bulletins (3)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', 'Help', and the IBM logo. Below the navigation bar, the 'Favorite Applications' list (2) includes 'IA Locations', 'IA Assets', 'IA Work Order Tracking', 'IA Deferred Maintenance Tracking', 'IA Job Plans', and 'IA Preventive Maintenance'. The 'Bulletin Board' (3) displays a table of messages with columns for Subject, Message, Post Date, Expiration Date, and Viewed. The 'Inbox / Assignments' (4) section shows a table with columns for Description, Owner Description, Last Memo, Start Date, Time Limit, Due Date, and Route, with a message 'No Assignments found for Trainer'. The 'Your Deferred Maintenance records in Approval Process' (5) section shows a table with columns for Work Order, Description, Category, Location, Site, Status, and Status Date, with a message 'No Data Found'. The 'KPI Graph' (6) section shows a message 'This portlet has not been set up. To set up, select the edit icon in the portlet header.'

3. **Bulletin Board:** You can create messages about critical problems and incidents that you can broadcast throughout the organization. Or you can specify an audience for a message. If you do, only members of that audience can see the message. You also specify the date and time for the message to appear and to expire.
4. **Inbox / Assignments:** Users can view communications that are generated by workflow processes.
5. **Result Set** (Titled 'Your DM Work Orders in Approval Process'): Displays the results of a 'Saved Query' in either list format or graphical format. Result sets help you focus in on the records that are most useful to you and, in some cases, save you from having to open an application to view a record.
6. **KPI (Key Performance Indicator) Graph:** The KPI Graph displays the Actual, Target, and Variance values for each KPI. When one KPI is selected it is shown as a gauge on the Start Center. When more than one KPI is selected, a bar chart is displayed.



## 6.2 The Navigation Bar

The Navigation Bar appears at the top of every screen in IA-FMS (Maximo). Use it to access these common elements:



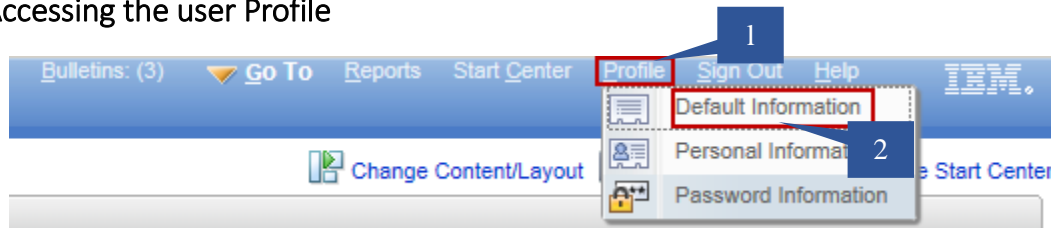
- 1) **Application Name:** Tells user the current location – active application.
- 2) **Bulletins:** Notifies the user there is a message on the Start Center.
- 3) **Go To:** Used to navigate between applications – the “main menu”.
- 4) **Reports:** Access to pre-defined IA work management reports.
- 5) **Start Center:** Returns user to Start Center – from anywhere in the application.
- 6) **Profile:** Accesses user profile information. This is where the user selects their ‘Default Insert Site’ and Storeroom access information.
- 7) **Sign-out:** Logs user out of the system.
- 8) **Help:** Access system on-line help.

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Note: *Beware of the Browser Back Button!* With IA-FMS (Maximo), it is **not** a good practice to use the 'Back' and 'Forward' buttons on your Browser. Doing so can cause unpredictable results and may result in the application becoming unstable, locking up, or kicking you out. Always use the IA-FMS (Maximo) application navigational elements.

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### 6.3 Accessing the user Profile



- 1) Select **Profile**.
- 2) Select **Default Information**.

 A screenshot of the 'Default Information' user profile page. The page title is 'Default Information'. The 'User' field is 'TRAINEE1' with a sub-field 'trainee1'. The 'Default Insert Site' field is 'IA004' with a search icon and a dropdown menu showing 'CHINLE AGENCY'. Below this is a checkbox 'Use Default Insert Site as a Display Filter?' which is checked. The 'Storeroom Site for Self-Service Requisitions' field is also 'IA004' with a search icon and a dropdown menu showing 'CHINLE AGENCY'. Other fields include 'Default Storeroom for Self-Service Requisitions' and 'User Default Application', both with search icons and dropdown menus.

### 6.4 Importance of Default Insert Site

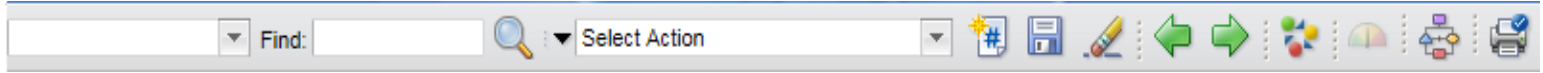
The site (i.e., school, agency, justice center) listed in the *Default Insert Site* field serves a twofold purpose. First, it acts as an automatic filter when searching for records within the IA-FMS (Maximo) applications. Second, whichever site is selected (to be the Default Insert Site) is assumed to be the site into which all records created by the user will be “inserted” (e.g. Work Orders, PMs, Assets). For instance, when creating a record in the system, that record will be created to whatever site the Default Insert Site field is currently displaying.

### 6.5 Clearing the Default Insert Site Filter


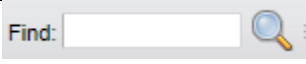







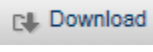





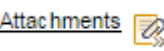
For users with multi-site access, they may want their default view of data within the system to reach across site boundaries and display data from all sites they have been granted access. In order to do this, users must un-check the **Use Default Insert Site as a Display Filter** checkbox from their Default Information user profile.

## 6.6 The Toolbar

The Toolbar appears near the top of every application in IA-FMS (Maximo), underneath the Navigation Bar.



Use the Toolbar to perform standard functions such as (from left to right on the toolbar):

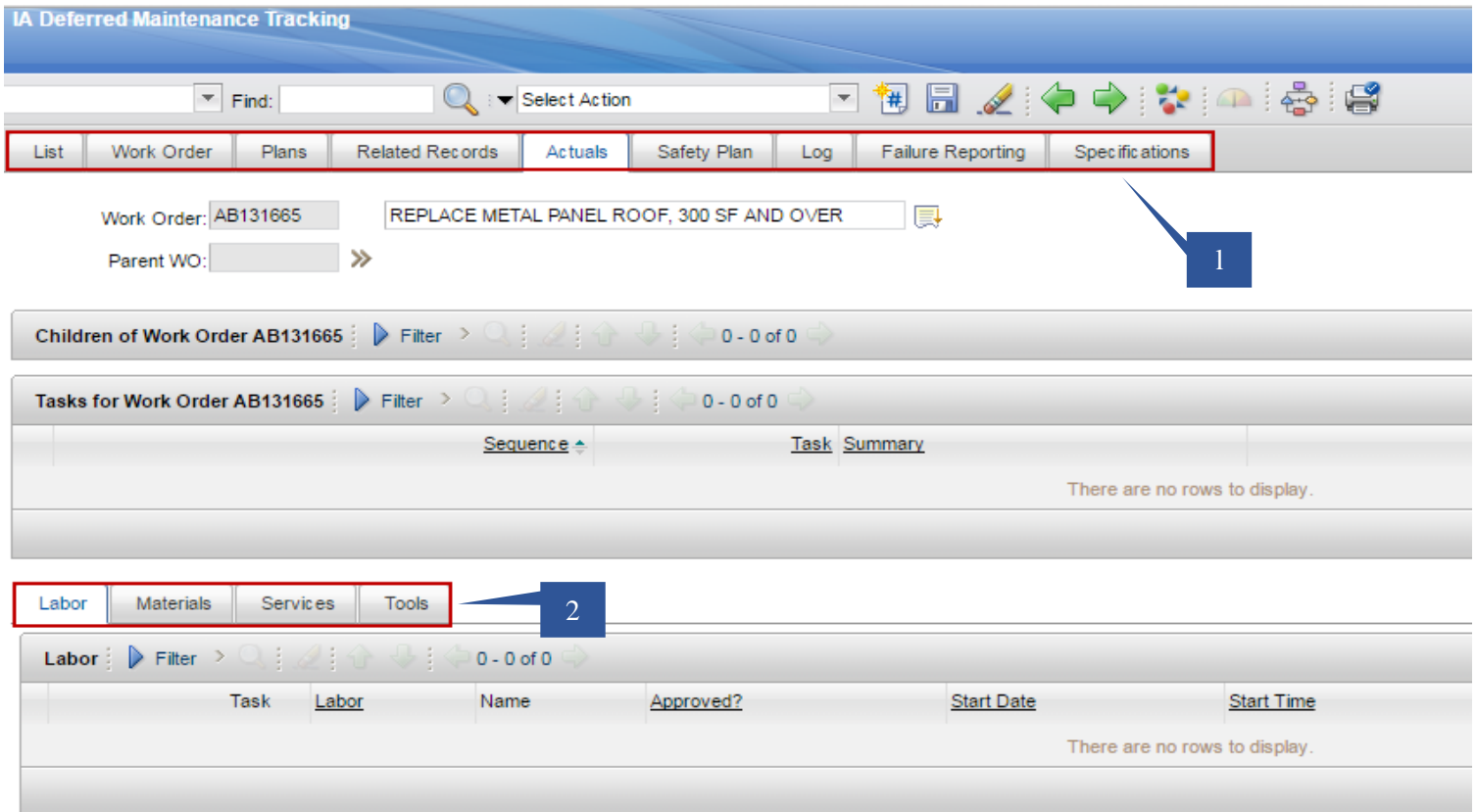
	<ul style="list-style-type: none"> <li>• Access Saved Queries</li> </ul>
	<ul style="list-style-type: none"> <li>• Find a Specific Record</li> </ul>
	<ul style="list-style-type: none"> <li>• Use the Select Action Menu</li> </ul>
	<ul style="list-style-type: none"> <li>• Insert New Record</li> </ul>
	<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>• Previous and Next Records within Table</li> </ul>
	<ul style="list-style-type: none"> <li>• Download Link to download the contents of the Table Window to a Microsoft (MS) Excel Spreadsheet.</li> </ul>
	<ul style="list-style-type: none"> <li>• A red asterisk next to a field indicates that this is a <b>Required</b> field. The record cannot be saved until this field is populated.</li> </ul>
	<ul style="list-style-type: none"> <li>• A red colored field indicates that this is a <b>Required</b> field. The record cannot be saved until this field is populated.</li> </ul>
	<ul style="list-style-type: none"> <li>• Refresh the display on the List tab.</li> </ul>
	<ul style="list-style-type: none"> <li>• Initiates Workflow process.</li> </ul>
	<ul style="list-style-type: none"> <li>• Add to Book Marked Records</li> </ul>
	<ul style="list-style-type: none"> <li>• Attached Documents functionality allows you to attach many types of information to a MAXIMO record, including, images, spreadsheets, and Web pages.</li> </ul>

### 6.7 Application Tabs & Sub-tabs

Application Tabs and Sub-tabs are used to access a variety of different screens available in each application. The different screens for each of the tabs (and sub-tabs) can be accessed by clicking on the tab headings. While each tab holds different information, the record being viewed does not change when changing tabs.

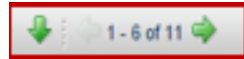
For example, within the 'IA Deferred Maintenance Tracking' application, screens and data are sub-divided by:

- 1. **Main Tabs.**
- 2. **Sub Tabs** depicted in the figure below. The sub-tabs exist within the Actuals (Main) tab.



### 6.8 Table Windows

Related pieces of data within an IA-FMS (Maximo) application are displayed in Table Windows. Buttons and action links on the Table Header provide users with the ability to interact with data displayed in the Table Window in pre-defined ways.



Maximo ID	Description	Structure #	Room #	Item
AB188857	Classroom, General	394	101	
AB188863	Mechanical Equipment Area	394	102	
AB188864	Storage	394	103	
AB188865	Corridor, Internal	394	104	

Table windows do not have scroll bars. A pre-specified number of records is displayed in each set. The table header displays **XX – YY of ZZ** records in the above example, showing as 1 – 6 of 11. If there is more than one set of records, use the **Previous Page and Next Page** buttons to see the previous set of records and the next set of records from the total group.

Clicking on the column headers within the Table Window sorts the data. In the below example, use the **View Detail** Icon to access record details for the row selected within the Table Window.

### 6.9 Editable Fields

Within IA-FMS (Maximo) applications the following types of fields are present:

- **Data entry fields** – fields in which you can enter, view, and modify data
- **Required fields** – indicated by a red asterisk (\*) and/or red-shading and must be filled before the record can be saved
- **Read-only fields** – indicated by blue text and cannot be modified
- **Default Values** – preset values used as part of a business practice or programmed by the system administrator
- **Calculated Values** – read-only field comprised of a mathematical calculation from other fields in the system

## 6.10 Field Assistants


Buttons within IA-FMS (Maximo) tabs and tables are referred to as Field Assistants. Below are the most common field assistants and what they do.


Value lists aid users by standardizing data input. When a user enters a value in a Value List field, IA-FMS (Maximo) validates the user's entry against a previously defined set of values acceptable for that value list. For example, if users were permitted to enter free-form text into the *Type* field in the IA Locations application, numerous spelling representations for the same type value might exist. Users might enter "Building", "Bldg", or "building", and many more derivations - each of which represent separate and unique values within the database. Subsequent data searches (queries) or reports containing the field would find (or not find) these numerous multiple listing for the same value, thus diminishing the value of queries within the IA-FMS (Maximo) system. Fields that validate user data input against a **Value List** include the Magnifying Glass field assistant to the right of the field.










### Select Value

- Displays a value list of available values. The values in this list are the only values that can be entered into the field.

\* Work Type:  

Work Subtype:  

**Work Type**

Filter >     1 - 4 of 4   Download 

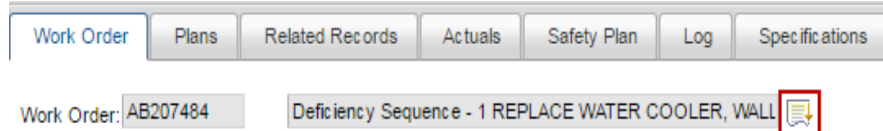
Type	Description	Organization
<input type="text"/>		
<b>CI</b>	<b>Capital Improvement</b>	<b>OFMC</b>
FM	Facility Maintenance	OFMC
FO	Facility Operations	OFMC
PM	Preventive Maintenance	OFMC

Cancel



**Long Description**

- Displays the long description dialog box for any given field where a long description has been defined.
- **Check Spelling** – Provides spell checking feature for long description text.
- Displays in orange color when long description text has been entered or is present for field.



**Long Description**


Deficiency Sequence - 1 REPLACE WOOD, SOLID CORE, INTERIOR DOOR AND HARDWARE,(DAMAGED), IN ROOM


Deficiency Sequence - 1 REPLACE WOOD, SOLID CORE, INTERIOR DOOR AND HARDWARE,(DAMAGED), IN ROOMS 22, 23, 24A, 37E, AND 37F. Additional Info LOCATION\_NUMBER: C58-10, INVENTORY\_TYPE: Building, STRUCTURE\_NUMBER: 99, ROOM\_NUMBER: NULL, STRUCTURE\_USE: School, Elementary, Day, COST\_CODE: Non-Quarters, WORK\_TYPE: NULL, MAINTENANCE\_CODE: UM - Unscheduled Maintenance, REQUESTOR\_NAME: Please Provide, REQUESTOR\_PHONE: Please Provide, REQUESTOR\_SUPERVISOR: Please Provide, WORK\_COMPLETED: NULL, INVENTORY\_ITEM: NULL



**Select Date**

- Displays a Select Date window containing a calendar/time.

Scheduled Start:  

Scheduled Finish:  

May

S	M	T	W	T	F	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

2014 2015 2016



OK Cancel



**Detail Menu Button**

Displays a drop-down menu of options for sources of data. Options differ depending upon the field being populated.

Location Type:

\* Maximo ID:    

- Select Value
- Open Drilldown
- Classification
- Go To Locations
- Go To IA Locations
- Go To Navigator
- View Contracts
- View Work Orders and PMs
- View Tickets





### Filter

This feature allows a user to search a list of values using words or numbers.

Select Labor

Labor Filter 1 - 15 of 1320 Download

<input type="checkbox"/>	Labor	Name	Craft	Skill Level	Vendor	Contract
<input type="checkbox"/>	JUJACKSON	Judge Jackson	LABORER			
<input type="checkbox"/>	LMORRIS	Morris , Leonard	LABORER			
<input type="checkbox"/>	BBYRE	Bill Byre	CONTRACTOR			
<input type="checkbox"/>	BMILLER2	Bryson Miller	HVAC			
<input type="checkbox"/>	RSMITH2	Robert Smith	FIRE			
<input type="checkbox"/>	SNUNEZ	Simon Nunez	FACMNGR			
<input type="checkbox"/>	TESTLABOR		MNTCRAFT			
<input type="checkbox"/>	PVALDES	Pedro Valdes	MNTWORK			
<input type="checkbox"/>	ENARANJO	Eugene Naranjo	CUST			
<input type="checkbox"/>	KTANIN	Keith Tanin	CUST			
<input type="checkbox"/>	CPONCHO	Charlotte Poncho	CUST			
<input type="checkbox"/>	RCONCHO	Richard Concho	CUST			
<input type="checkbox"/>	PFERNANDO	Phillip Fernando	MECH			
<input type="checkbox"/>	DGUTIERREZ	David Gutierrez	MECH			
<input type="checkbox"/>	KREDELL	Karen Reddell	ADMINASST			

OK Cancel

Select Labor

Labor Filter 1 - 13 of 13 Download

<input type="checkbox"/> Labor	Name	Craft	Skill Level	Vendor	Contract
<input type="checkbox"/>	Keith				
<input type="checkbox"/>	BENJAMINK Keith, Benjamin	MNTSUPER			
<input type="checkbox"/>	KAPACHITO Apachito, Keith	MNTCRAFT			
<input checked="" type="checkbox"/>	<b>KBOYD Keith Boyd</b>	<b>MNTWORK</b>			
<input type="checkbox"/>	KEITHY Yessilth, Keith	MNTSUPER			
<input type="checkbox"/>	KFLEURY Keith Fleury	LABORER			
<input type="checkbox"/>	KKEITH Keith, Kenneth	MNTSUPER			
<input type="checkbox"/>	KKING King, Keith	MNTCRAFT			
<input type="checkbox"/>	KLOAS Keith Loas	CUST			
<input type="checkbox"/>	KLOAS Keith Loas	MNTWORK			
<input type="checkbox"/>	KNACHU Keith Nachu	CUST			
<input type="checkbox"/>	KNACHU Keith Nachu	MNTWORK			
<input type="checkbox"/>	KNIXON Keith Nixon	CUST			
<input type="checkbox"/>	KTANIN Keith Tanin	CUST			

OK Cancel

## 6.11 Navigating Hierarchies

Data within IA-FMS (Maximo) can be organized and related using a hierarchical structure. Often times the data is organized using a parent-child hierarchy to reflect or model the real-world relationship of specific locations and assets. For example, a building location may physically have many different rooms. The building itself would be a location with one or more child records to represent each of the rooms. Thus, a two level location hierarchy would be constructed in Maximo (Building → Room) to represent the physical layout of the building.

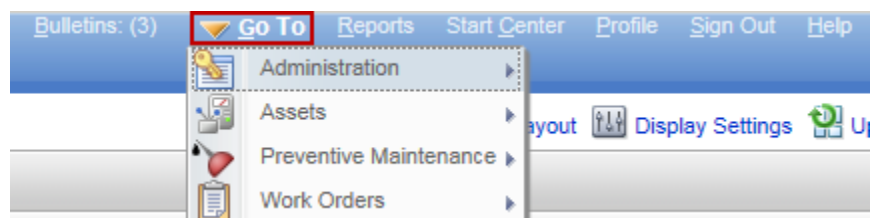
---

**NOTE:** It is of vital importance that users review the IA Location hierarchies to ensure locations are in the correct Site. It is also important to periodically check the information contained on the FBMS tab to ensure location information within FBMS is being maintained properly. If discrepancies are discovered, please contact your Regional Facility Manager and Real Property Manager who will assist with completing and submitting the FBMS Asset Update Form. This form will be made available in IA-FMS (Maximo). All location data updates have to be made in FBMS and FBMS will update IA-FMS (Maximo) through the interface (IF505).

---

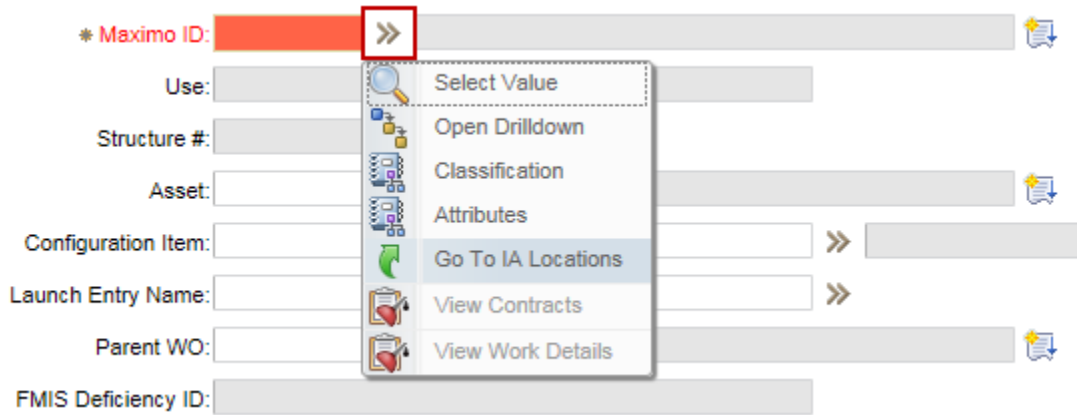
## 6.12 Navigating Between Applications.

Use the Menu Bar for global navigation within IA-FMS (Maximo). The **Go To** menu will show all modules and applications therein to which you have been granted access.



## 6.13 Select Value and Return with Value

Within any application, users can access or *hyperlink* to other applications. From the **Select Value** dropdown field assistant menus, you can hyperlink from one application to another. This can be done to view related data in another application, or to retrieve related data.



When 'Hyperlinking' to another application (in this example, the IA Assets Application), the **Navigation Bar** will be gray in color and will only have two options:

- **Return**
- **Return with Value**




Once a value is selected in the target application, selecting **Return with Value** will automatically close the target application and return the selected value to the calling application and automatically populate the selected field.

To return to the calling application without filling in values (in this example, IA Work Orders) the user would click the **Return** icon.

## 6.14 Downloading into an Excel spreadsheet

IA-FMS (Maximo) allows users to export information from the **List** tab (or any value list) from any application into an Excel spreadsheet. This download feature exists where ever the **Download**

 **Download** icon is displayed.

On the List tab of each application the  **Download** icon will appear in the upper left hand corner of the screen.

The screenshot shows the 'IA Work Order Tracking' application interface. At the top, there is a navigation bar with 'Bulldozers (3)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar with 'Find:' and a 'Select Action' dropdown. A toolbar contains icons for 'List', 'Standing Parent WO', 'Work Order', and 'Specifications'. A 'Work Orders' section shows a list of 1-20 of 108 items. A 'Download' icon in the top right of this section is highlighted with a red box.

Work Order	Description	Structure #	Room #	Maximo ID	Location Type	Work Type	Status	FMIS Work Ticket	Site
AB105584	STRUCTURE I-1 FO SO	I-1	2	AB101072	1100	RPFO	APPR		JS004
AB105585	STRUCTURE I-1 PM SO	I-1	2	AB101072	1100	RPFM	APPR		JS004
AB105586	STRUCTURE I-1 UM SO	I-1	2	AB101072	1100	RPFM	APPR		JS004
AB105687	STRUCTURE I-2 FO SO	I-2		AB101073	1100	RPFO	APPR		JS004
AB105688	STRUCTURE I-2 PM SO	I-2		AB101073	1100	RPFM	APPR		JS004
AB105689	STRUCTURE I-2 UM SO	I-2		AB101073	1100	RPFM	APPR		JS004
AB124640	OSO-OJS - CROW AGCY			AB900246	0001	RPFO	APPR		JS004

The Download icon can also be found on **Select Value** Lists.

The screenshot shows the 'IA Work Order Tracking' application interface with a 'Select Value' dropdown menu open for the 'Maximo ID' field. The dropdown menu is highlighted with a red box and contains the following options: 'Select Value', 'Open Drilldown', 'Classification', 'Attributes', 'Go To', 'View Contracts', and 'View Work Details'. The 'Maximo ID' field is also highlighted with a red box.

Work Order: AB105584    STRUCTURE I-1 FO SO

Site: JS004    CROW AGENCY (Crow Law Enforcement Center)

Location #: C52-02

Location Type: 1100

Maximo ID: AB101072    Law Enforcement, Detention Center, Adult

Use: BUILDING \ LA    Select Value    T

Structure #: I-1

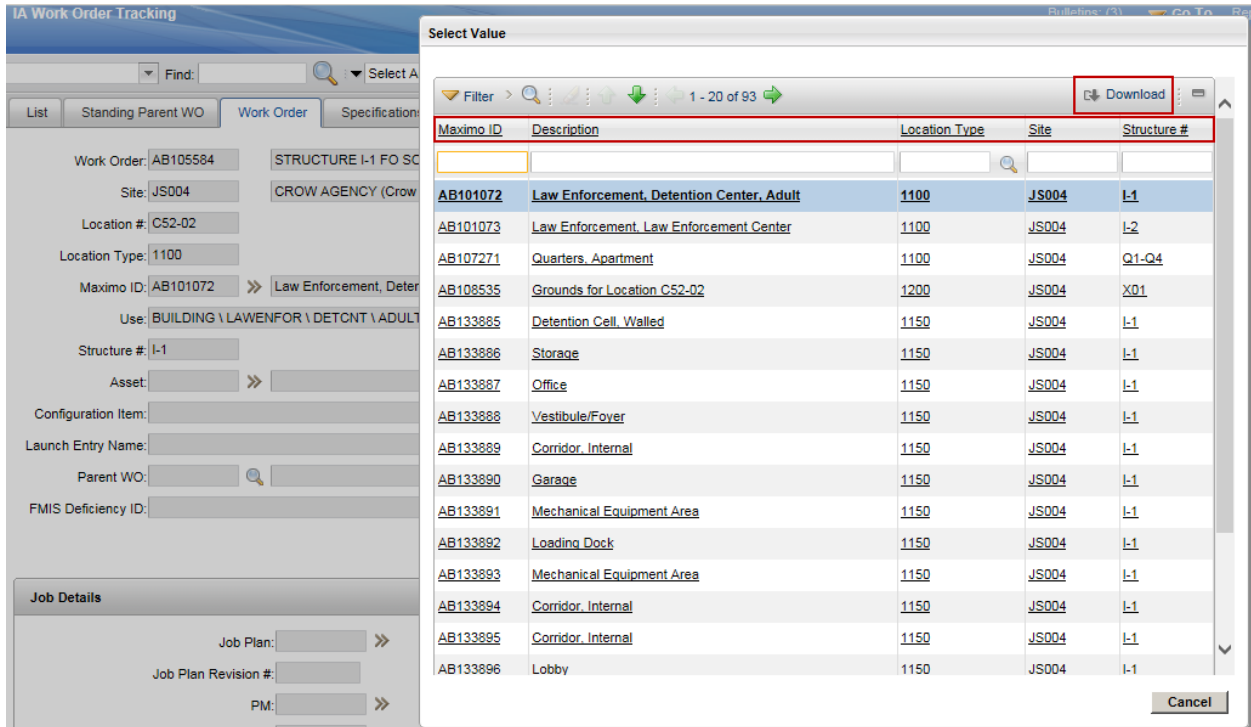
Asset:

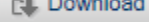
Configuration Item:

Launch Entry Name:

Parent WO:

FMIS Deficiency ID:



Click on the **Download**  icon. The headers for each column match the heading in the Select Value list. This spreadsheet can then be sorted and treated as a normal Excel spreadsheet.

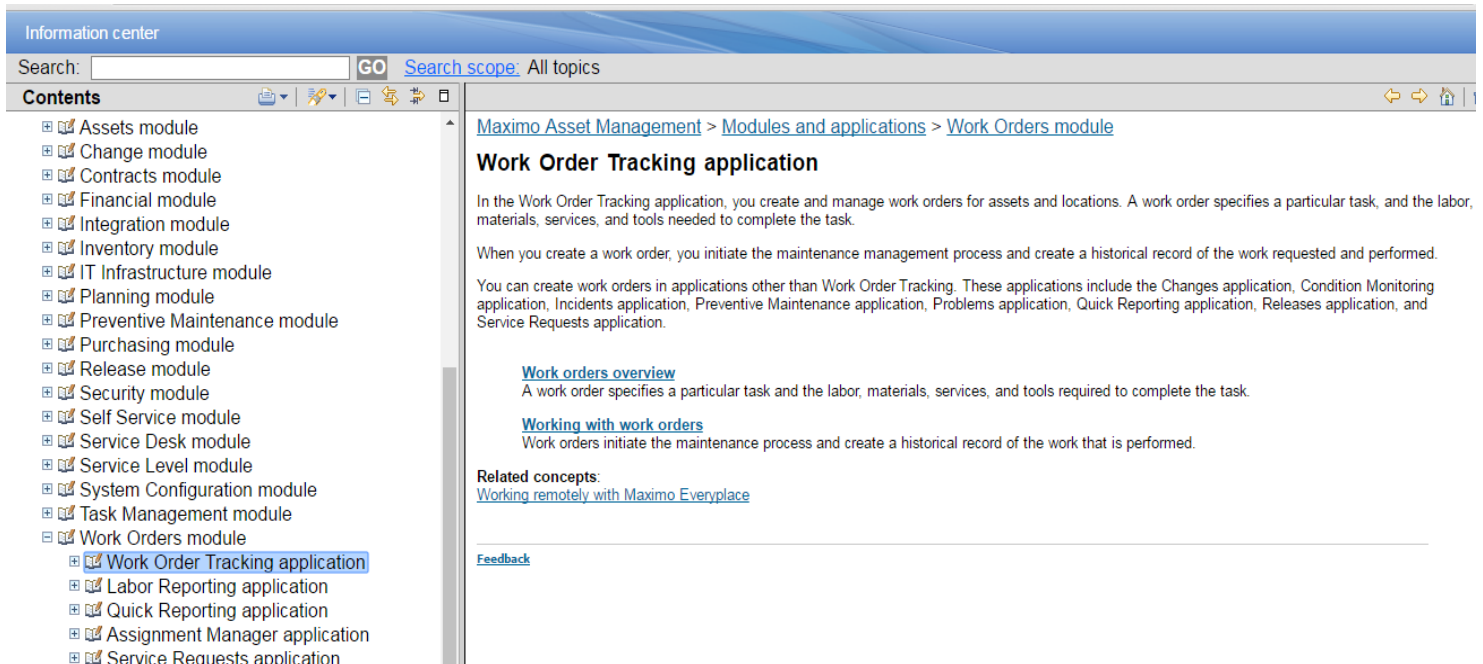
	A	B	C	D	E
1	Maximo ID	Description	Location Type	Site	Structure #
2	AB101072	Law Enforcement, Detention Center, Adult	1100	JS004	I-1
3	AB101073	Law Enforcement, Law Enforcement Center	1100	JS004	I-2
4	AB107271	Quarters, Apartment	1100	JS004	Q1-Q4
5	AB108535	Grounds for Location C52-02	1200	JS004	X01
6	AB133885	Detention Cell, Walled	1150	JS004	I-1
7	AB133886	Storage	1150	JS004	I-1
8	AB133887	Office	1150	JS004	I-1
9	AB133888	Vestibule/Foyer	1150	JS004	I-1
10	AB133889	Corridor, Internal	1150	JS004	I-1
11	AB133890	Garage	1150	JS004	I-1
12	AB133891	Mechanical Equipment Area	1150	JS004	I-1
13	AB133892	Loading Dock	1150	JS004	I-1
14	AB133893	Mechanical Equipment Area	1150	JS004	I-1
15	AB133894	Corridor, Internal	1150	JS004	I-1
16	AB133895	Corridor, Internal	1150	JS004	I-1
17	AB133896	Lobby	1150	JS004	I-1
18	AB133897	Storage	1150	JS004	I-1
19	AB133898	Mechanical Equipment Area	1150	JS004	I-1

## 6.15 IA-FMS (Maximo) Help

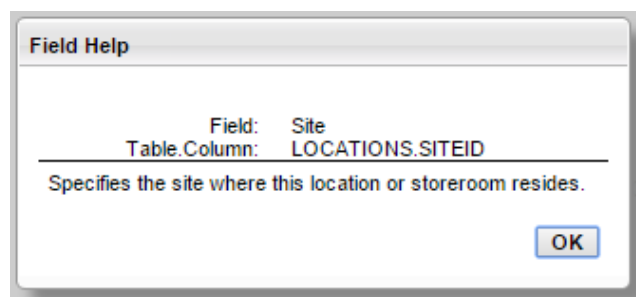
Help can be accessed via the **Help** icon located in the Menu bar. This will provide users with Maximo system help, or Application specific help for the application which they are presently using. *This information is very generic and does not include IA-FMS specific information.*



The Maximo system help allows users to search and browse topics related to the generic functionality of Maximo.

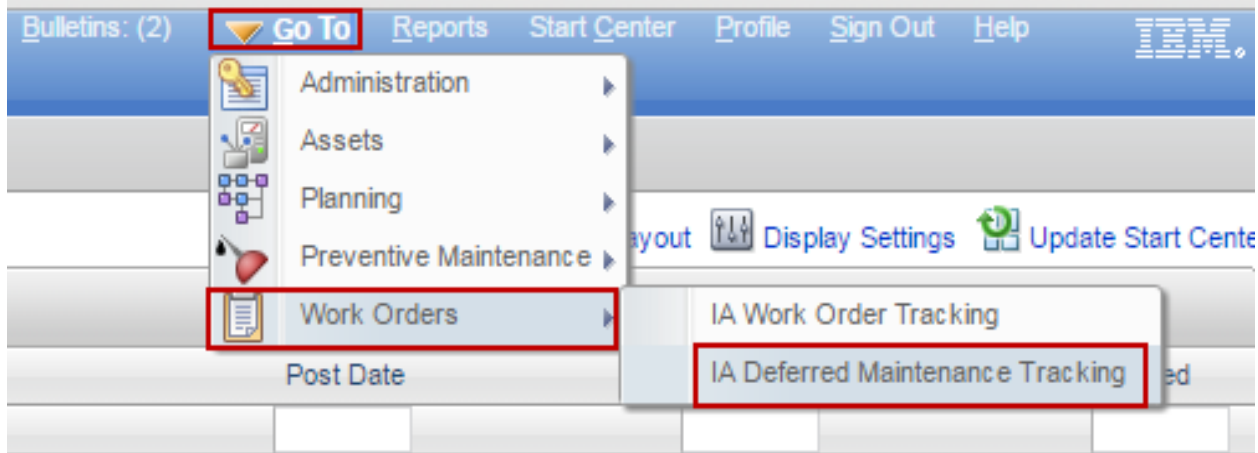


Additionally, field-level, contextual help is available by clicking into any field within an application and pressing the '**Alt+F1**' key combination (hold down the 'Alt' key and press the 'F1' key). This will provide Table/Column names and a description explaining the purpose of the field.



## 6.16 Querying and Searching Data

To search for a particular record within the IA-FMS (Maximo) system, you must first be in the correct application, all of which are accessible from the **Go To** icon located on the Menu bar at the top right of your screen.

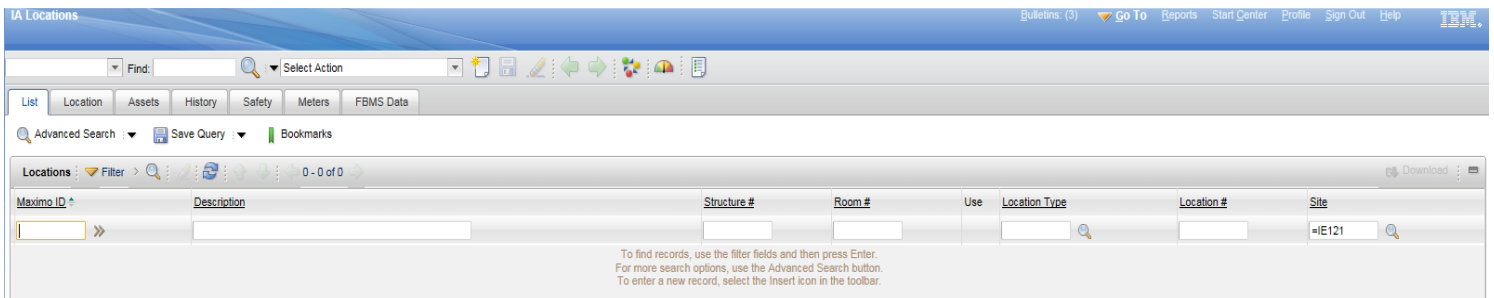


From here, select the module and then the application you need:

- **Assets** includes IA Assets, IA Locations
- **Inventory** includes Tools
- **Planning** includes IA Job Plan
- **Preventive Maintenance** includes IA Preventive Maintenance
- **Resources** includes People, Crafts, and Labor
- **Work Orders** includes IA Work Order Tracking and IA Deferred Maintenance Tracking

Once you have selected the correct application you will be taken to its **List** tab - which is the default starting point for each application within IA-FMS (Maximo).

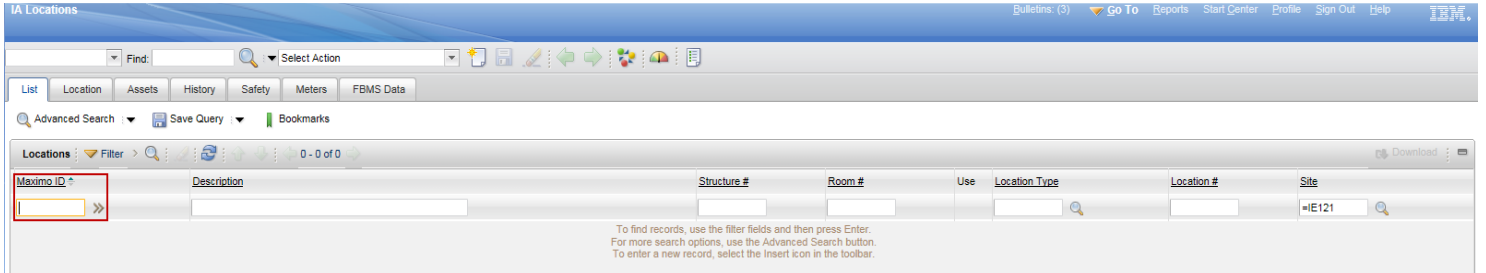
- All applications start with a blank list view.
- The List tab view has been pre-configured to display the most important and useful fields from each application. This allows users to quickly search, locate, and filter for data with a minimum number of screen clicks and navigating within the specific IA-FMS (Maximo) application.
- The user's default insert site is pre-populated (see Site designator below)



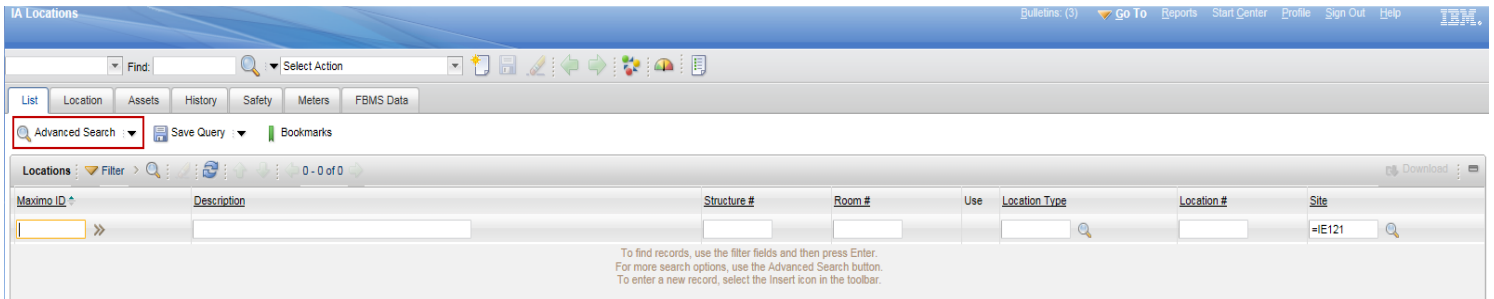
From the list tab, you can records in one of three ways:



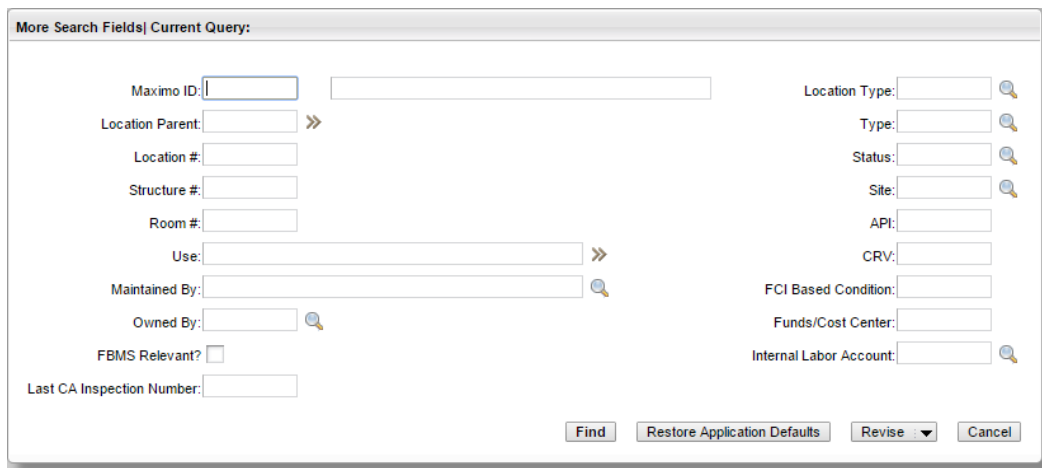
- 1) To display *All Records* place the cursor in the blank field on the left hand side of the List tab and hit the Enter button on the keyboard. This will display all records within your specific site for the application you are in. With larger sites this list can run into the several hundred.



- 2) Narrow your search by using one or any combination of the search fields. In this example, you may narrow your search by **Maximo ID**, **Description**, **Structure #**, **Room #**, **Location Type** etc.



- 3) Utilize the **Advanced Search** button to incorporate additional values to help create a more detailed and specific search.



**Note:** A list of available query code symbols and search operators (wildcard characters, etc.) can be found in the system Help menu within IA-FMS (Maximo) - or *See the list of commonly used ones below.*

Maximo ID	Description	Structure #	Room #	Use	Location Type	Location #	Site
	Pump				1100		=IE121
AB102850	Pump House	506		BUILDING \ PUMPHS	1100	N32-07	IE121
AB102858	Pump House	533		BUILDING \ PUMPHS	1100	N32-07	IE121

Once the search for a group of records has been performed simply select the record using the value associated with it on the *Left Hand* side of the screen to view the record details.

Maximo ID: AB102850 \* Pump House

Structure #: 506

Room #:

Use: BUILDING \ PUMPHS

FBMS ID: IB14001000344920000013

FRPP #: BDN32RD700506

\* Location Type: 1100

Maintained By: BIA Education

\* Owned By: BIA

Tribal Reference ID:

OSG (Y/N)?

Remote Location?

Attachments

Site: IE121 RED ROCK DAY SCHOOL

Location #: N32-07

API: 100

Mission Dependency: 1

DM Cost:

CRV: 125,764.00

FCI: 0.00

FCI Based Condition: Good

\* Type: OPERATING

Status: OPERATING

FBMS Status: NONE

Funds/Cost Center: AADD32N070

Last CA Inspection Number:

Last CA Inspection Date:

## 6.17 Commonly Used Search Operators

IA-FMS (Maximo) supports the following common search operators within all application search fields.

- **Equal Sign ( = )** - finds only records that match that word or number exactly. There should be no space between the equals sign and the word or characters that follow.
- **Greater Than ( > )** - finds records greater than that word or number.
- **Less Than ( < )** - finds records less than that word or number.

## 6.18 Commonly Used Wildcards

Sometimes you do not know the exact value for a field you want to use in a query. For example, you remember only part of a work order number, but not the exact number. When you do not know the exact value, you can search using the partial value plus a wildcard character. A **wildcard character** is a special symbol that stands for one or more characters. A **character** is an individual letter or number.

IA-FMS (Maximo) supports the following two Wildcards for searching data.

- Use the **Underscore** (`_`) to substitute for a *single* character.
- Use the **Percent** sign (`%`) to substitute for a *string* of characters

A **string** is any grouping of letters, numbers, or both. A word is an example of a string of letters.

### Placement of Wildcard Characters

When you use a wildcard character in a search field, place the wildcard character exactly where the unknown character(s) would occur. You can use more than one wildcard character in a single search.

Placement	Finds	Example
<code>%X</code>	all instances where <i>X</i> is the last in the string of characters	<code>%ing</code> would return all instances where a word ended in <i>-ing</i>
<code>X%</code>	all instances where <i>X</i> is the first in a string of characters	<code>M%</code> would return all instances where the word started with the letter <i>M</i>
<code>%X%</code>	all instances where <i>X</i> falls <i>anywhere</i> within the string of characters	<code>%3%</code> would return all records with the number <i>3</i> anywhere in the field

## 6.19 Searching for Null Values

A **null** value is the absence of a value in a field. Nulls indicate missing or unknown data, and are not the same thing as the number zero (0) or a blank space.

Because a null indicates a lack of data, searching for null values is different from searching for other values. When using the List tab or the Advanced Search/More Search Fields dialog box to search for records containing null values you use the following syntax:

- To search for records that contain a NULL value for a field enter: `~null~`
- To search for records that do *not* contain a null value for a field (known as a NOT NULL value) enter: `!=~null~`

---

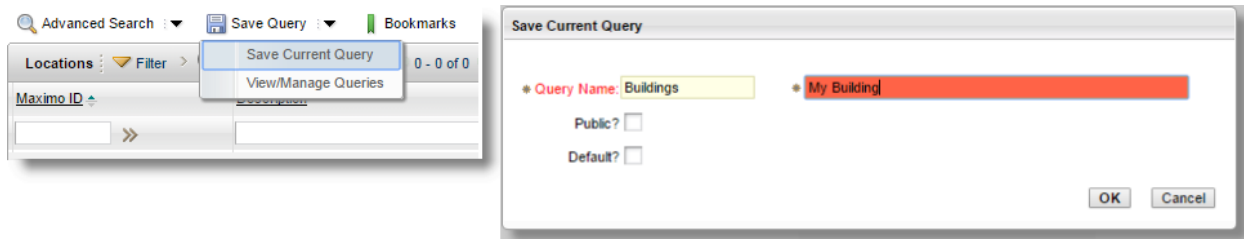
**Note:** When searching for null values using the WHERE Clause dialog box you use the SQL comparison values IS NULL and IS NOT NULL to select and compare null values.

---

## 6.20 Saving a Query

After searching for records and executing a series of searches or filters, it may be helpful to save the query. By saving a query, it can be re-run without having to remember the steps necessary to obtain the desired results.

Queries can be saved as private or public and can be designated as your default query for an application.



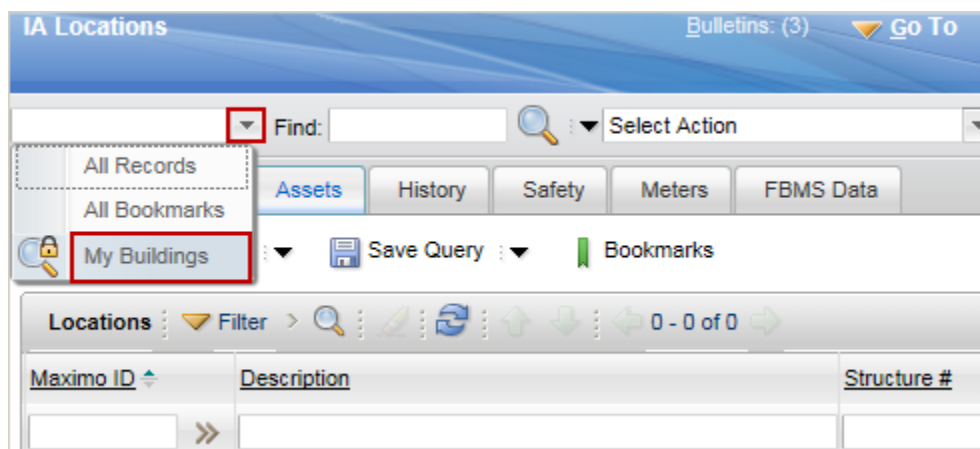
### To Save a Query

- 1) Click on the **Save Query** button (next to the **Advanced Search**) and
- 2) Select **Save Current Query**.
- 3) Enter a **Query Name** for the query and a brief **Description**.
- 4) Click **OK**.

If the query is marked as public - all other users within the IA-FMS (Maximo) system will have access to view and run your query. If the query is marked as default, this query will be run each time you access the application where the query was created. This default query will automatically populate the List Tab - and you will not start the application with a blank list screen.

### Running a Saved Query

To re-run your saved query, select it from the Toolbar - Saved Queries drop down menu.



Your saved query and all other available queries will appear in this drop-down menu. Select the query you wish to run and IA-FMS (Maximo) will automatically apply the query and display the results on the List Tab.

## Navigation- Student Exercise #1

In this exercise you will perform basic Navigation within the IA-FMS (Maximo) system to answer the following questions. This exercise is designed as an "instructor follow-along". The instructor will answer each of the questions as students follow along within IA-FMS (Maximo). The exercise will reinforce the navigation concepts.

### Answering Questions using the IA-FMS (Maximo) System

- 1) How do you access your 'Profile' information?
  
- 2) Where do you go to find Work Orders?
  
- 3) How do you select an individual Work Order to view the Work Order details?
  
- 4) How many Work Orders are in your Site?
  
- 5) What 'tabs' are displayed in the **IA Work Order Tracking** application?
  
- 6) How would you find all buildings (i.e. Locations Types) that have a 'Decommissioned' status in your site? How many are there? \_\_\_\_\_
  
- 7) What icon is used to Save data and information?
  
- 8) What icon is used to create a new record in any application?
  
- 9) How do you find work orders that have a Work Type = 'RPFM' and a Status = 'APPR'? How many records are there at your site?
  
- 10) Create a Saved Query using the search information used in the previous exercise (Step 9).
  
- 11) How would you find all the 'Tower' records (i.e. Location Type) within a site? How many are there?  
\_\_\_\_\_
  
- 12) Run the Saved Query created in Step 10.

- 13) How do you find detailed information about an individual field in IA-FMS (Maximo)? Things like the Table or Column and the purpose of the field.
- 14) Where is the 'Change Status' icon? What is its purpose?
- 15) Navigate to the 'IA Job Plans' application?
- 16) How do you 'page through' the list of Locations (Maximo ID) records that are displayed on the List tab of the IA Locations application?
- 17) How do you return to the Start Center from any application?

## Navigation- Student Exercise #2

In this exercise you will perform basic Navigation within the IA-FMS (Maximo) system to answer the following questions.

### Finding Data in the IA-FMS (Maximo) System

- 1) What is your current Site ID (the Site ID assigned to the training user account)? \_\_\_\_\_
  
- 2) Create a Saved Query of all work orders in your site that have a Status of 'APPR'. Write down the query name \_\_\_\_\_.
  
- 3) Create a Saved Query of all Buildings in your site (Buildings are type of Locations). Write down the query name \_\_\_\_\_.
  
- 4) How many total IA-FMS Maximo ID's (Locations) are contained in your site? \_\_\_\_\_.
  
- 5) How many Maximo ID's (Locations) have the word 'Office' in the description?  
\_\_\_\_\_.
  
- 6) Find a Location at your site and write down its CRV and FCI Based Condition values:  
  
Maximo ID (Location): \_\_\_\_\_  
CRV: \_\_\_\_\_  
FCI Based Condition: \_\_\_\_\_
  
- 7) Find a Building record (i.e. Location) at your site and write down its Area Gross (SF) and the Occupying Program:  
  
Maximo ID (Location): \_\_\_\_\_  
Area Gross (SF) \_\_\_\_\_  
Occupying Program \_\_\_\_\_
  
- 8) Find a single work order at your site with a Work Type = 'RPFM'. Write down the Work Order Number and Structure #.  
  
Work Order \_\_\_\_\_  
Structure # \_\_\_\_\_

9) List the Maximo ID (Location), Structure # and Description for 3 buildings at your site:

Building #1:  
Maximo ID (Location): \_\_\_\_\_  
Structure #: \_\_\_\_\_  
Description: \_\_\_\_\_

Building #2:  
Maximo ID (Location): \_\_\_\_\_  
Structure #: \_\_\_\_\_  
Description: \_\_\_\_\_

Building #3:  
Maximo ID (Location): \_\_\_\_\_  
Structure #: \_\_\_\_\_  
Description: \_\_\_\_\_

10) How would you find Maximo ID's (Locations) at your site whose description **begins** with the word 'Quarter'?