

USING THIS MAXIMO USER REFERENCE GUIDE

This Maximo User Reference Guide provides information to help users understand and navigate the Maximo system. Note: Words or phrases in *Italic* refer to areas where company specific information should be applied.

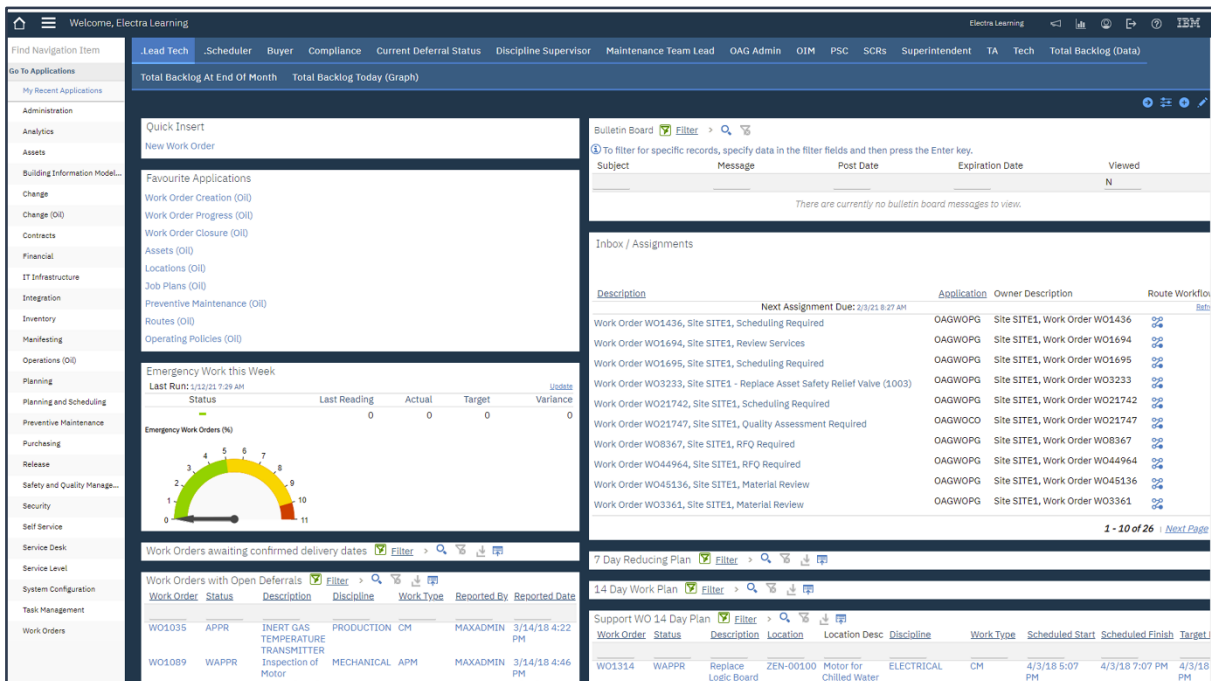
Accessing Maximo

A username and password is required to access the Maximo system. If this has not been issued to you, it can be requested by contacting the *IT Helpdesk*.

From the login screen, enter username and password (password is case sensitive). Users will be prompted to change the password upon first login. New passwords should contain a variety of upper case, lower case, numbers and special characters, *further company specifications may apply*.








Start Center

The first screen displayed is the Start Center.



The main body of the Start Center is made up of a series of portlets, as well as a Navigation Bar that runs along the top of the screen. The main menu options are described in the table below.



Icon	Title	Function
	Start Center	Clicking this option will return the user to the Start Center .
	GoTo	The GoTo menu displays a list of all accessible modules determined by job role.
	Bulletins	These are messages, typically generated by system administrators to inform users about system outages, changes or improvements.
	Reports	The Reports option allows users to run various pre-defined reports within Maximo.
	Profile	This menu option allows users to update their Default Information , such as Site and Storeroom , as well as Personal Information .
	Sign Out	Clicking on this button will sign users out of the Maximo application.
	Help	Maximo Online Support allows you to access the online support related to the Maximo system.

Portlets Overview

Portlets offer quick access to chosen applications and actions as well as an at-a-glance view of work that requires attention. The records displayed within portlets are the result of pre-defined queries and typically cannot be modified, deleted, or added to by users.

Inbox / Assignments						
Description	Application	Owner	Description	Route	Workflow	
Next Assignment Due: 2/3/21 8:27 AM Refresh						
Work Order WO1436, Site SITE1, Scheduling Required	OAGWOPG	Site SITE1,	Work Order WO1436			
Work Order WO1694, Site SITE1, Review Services	OAGWOPG	Site SITE1,	Work Order WO1694			
Work Order WO1695, Site SITE1, Scheduling Required	OAGWOPG	Site SITE1,	Work Order WO1695			
Work Order WO3233, Site SITE1 - Replace Asset Safety Relief Valve (1003)	OAGWOPG	Site SITE1,	Work Order WO3233			
Work Order WO21742, Site SITE1, Scheduling Required	OAGWOPG	Site SITE1,	Work Order WO21742			
Work Order WO21747, Site SITE1, Quality Assessment Required	OAGWOCO	Site SITE1,	Work Order WO21747			
Work Order WO8367, Site SITE1, RFQ Required	OAGWOPG	Site SITE1,	Work Order WO8367			
Work Order WO44964, Site SITE1, RFQ Required	OAGWOPG	Site SITE1,	Work Order WO44964			
Work Order WO45136, Site SITE1, Material Review	OAGWOPG	Site SITE1,	Work Order WO45136			
Work Order WO3361, Site SITE1, Material Review	OAGWOPG	Site SITE1,	Work Order WO3361			

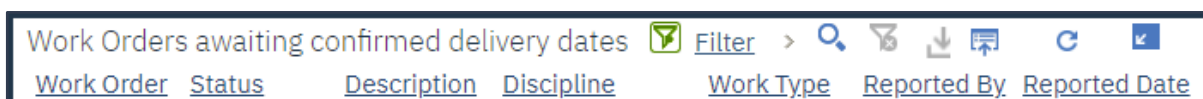
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Every Start Center contains the following portlets.

- **Quick Insert:** A list of applications to create new records.
- **Favourite Applications:** Applications most often used and grouped together for easy access. These applications are also accessed via the **GoTo** menu on the **Navigation** bar.
- **Inbox / Assignments:** Notifications sent to the user as part of the workflow process. The description of the assignment will advise what action is required.

Portlets Functionality

Each portlet displays a **Title** and contains buttons to help filter, search and download the results of the query. The buttons are described in the table below.

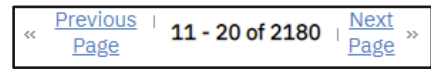


Button	Title	Function
	Close/Open Filter	Clicking this button when blue will open the filter fields, clicking when green, will close the filter fields.
	Filter Table	Clicking this button will launch a search based upon criteria entered into the search fields.
	Clear Filters	Clicking this button will clear the search criteria and return the original results in the portlet.
	Download	Clicking this button will download results to an Excel spreadsheet.
	Open Result Set in the Application	Clicking this button will open the portlet results in the relevant application. Note: The results displayed will only refer to the query within the portlet.
	Reload	Clicking on this button will reload data within the portlet.
	Minimize/Maximize	Clicking on this will minimize/maximize the portlet.

Note: The **Minimize** function should be used with caution as portlets will remain in this state even when logging out and back into Maximo.

The total number of records within a portlet are displayed at the bottom right. Only 10 records will be displayed at any time.

The **Next Page/Previous Page** buttons can be used to scroll between different pages of records with the portlet.



Clicking on the individual record within a portlet opens the record in the relevant application.

Filters can also be applied on the various fields, for example, in the **Work Type** field, search for **CM** records only.

Refer to **Maximo User Reference Guide - Searching** for information on using filters and searching.

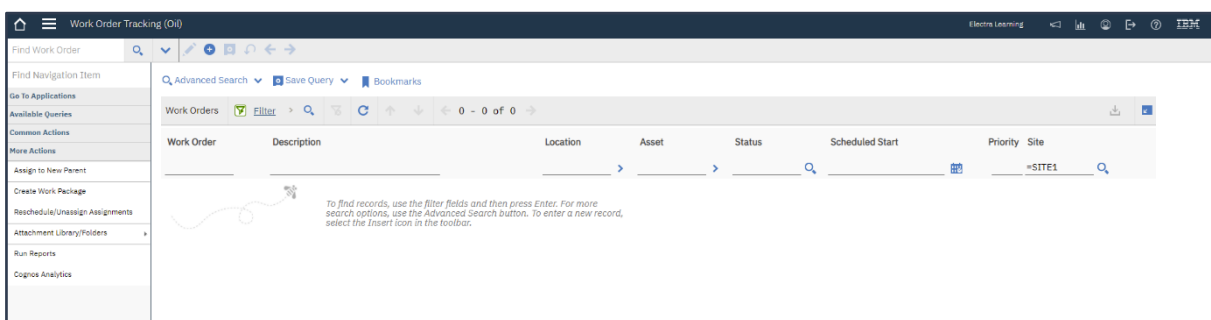
Work Order	Status	Description	Discipline	Work Type	Reported By	Reported Date
WO1035	APPR	INERT GAS TEMPERATURE TRANSMITTER	PRODUCTION	CM	MAXADMIN	3/14/18 4:22 PM
WO1089	WAPPR	Inspection of Motor	MECHANICAL	APM	MAXADMIN	3/14/18 4:46 PM
WO1093	WAPPR	Inspection of Motor	MECHANICAL	APM	MAXADMIN	3/14/18 4:46 PM
WO1095	WAPPR	Inspection of Motor	METERING	APM	MAXADMIN	3/14/18 4:46 PM
WO1117	INTRANSIT	Repair Asset	METERING	REP	MAXADMIN	3/16/18 12:25 PM
WO1284	INPRG	Replace Handrail	SCAFFOLD	CM	BPD-DEMO	3/30/18 12:54 PM
WO1285	WAPPR	Replace Handrail	SCAFFOLD	CM	MAXADMIN	3/30/18 1:34 PM
WO1286	WAPPR	Replace Handrail	SCAFFOLD	CM	MAXADMIN	4/2/18 10:30 AM
WO1287	WAPPR	Replace Handrail	SCAFFOLD	CM	MAXADMIN	4/2/18 1:17 PM
WO1288	WAPPR	Replace Handrail	SCAFFOLD	CM	BPD-DEMO	4/2/18 1:46 PM

Clicking on the underlined column header will sort records alphabetically, numerically or by date.

For example, click once on **Reported Date** to sort in ascending date order, click again to sort in descending date order and click a third time to return to the original order.

Application View

Every application within Maximo has the same look and feel. The top left-hand corner specifically tells which application is open and has a toolbar containing search options, and buttons. This toolbar will change depending on the application and the task being performed. Down the left-hand side is a menu of **Applications**, **Available Queries**, **Common** and **More Actions** relevant to the current application.



Application Functionality

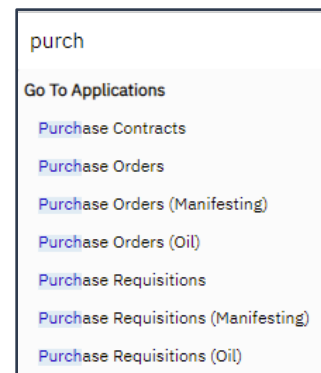




Toolbar


- **Quick Find Field (1)** – Use to search for a single record, e.g., a work order. Note: The exact ID number must be used.
- **Find Field (2)** – Use to apply search parameters to return a list of specific records e.g., a CM work order with a problem code: failing to close on demand.
- **Quick Search Menu (3)** – More options related to searching.
- **Toolbar Buttons (4)** – Hover over each for a description of the action they perform.

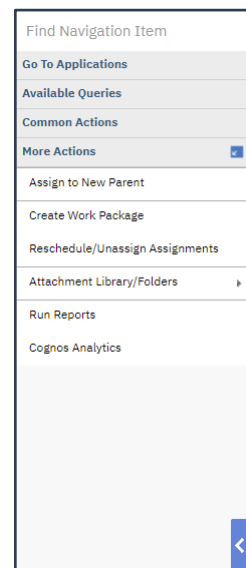
Menu

At the top of the menu, the **Find Navigation Item** offers a type ahead feature to locate Applications, Queries, Common and More Actions relevant to all applications, e.g., type “purch” into the field and a list of options will display relevant to the **Purchasing** application.



Use the **Minimize**  or **Maximize**  buttons to expand/collapse the options within the menu. Note: Hover over the heading to access the buttons.

- **Go To Applications** – Offers the same list of applications as the **Go To**  icon in the **Navigation** menu.
- **Available Queries** – Contains saved search queries which are common searches relevant to the current application.
- **Common Actions** – Offers a list of commonly used actions relevant to the current application.
- **More Actions** – Offers a list of additional actions relevant to the current application.



Use the **Minimize**  or **Maximize**  section button to open and close the menu.

Refer to the other **Maximo User Reference Guides** for further help.