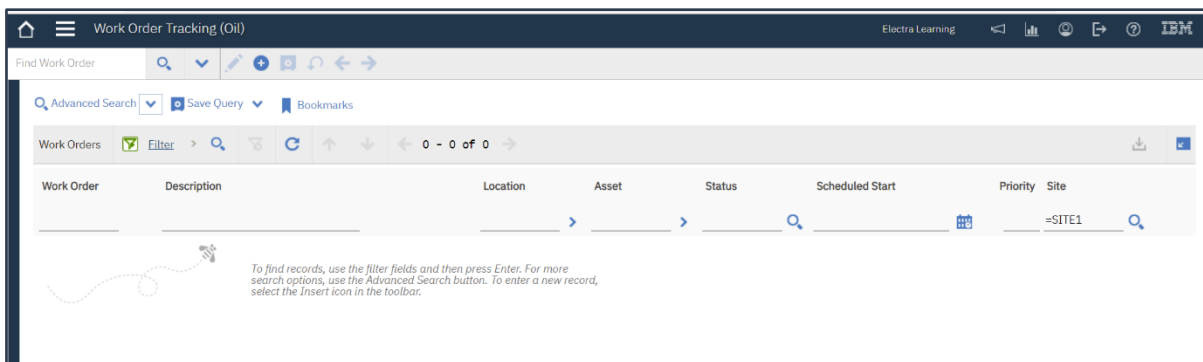


USING THIS MAXIMO USER REFERENCE GUIDE

This Maximo User Reference Guide provides several search techniques to easily find information in Maximo. Although using Work Order Tracking (Oil) to look at using filters and narrowing down menu options, the techniques described can be applied to any application within Maximo e.g., Purchase Orders. Note: Words or phrases in *Italic* refer to areas where company specific information should be applied.


List Tab

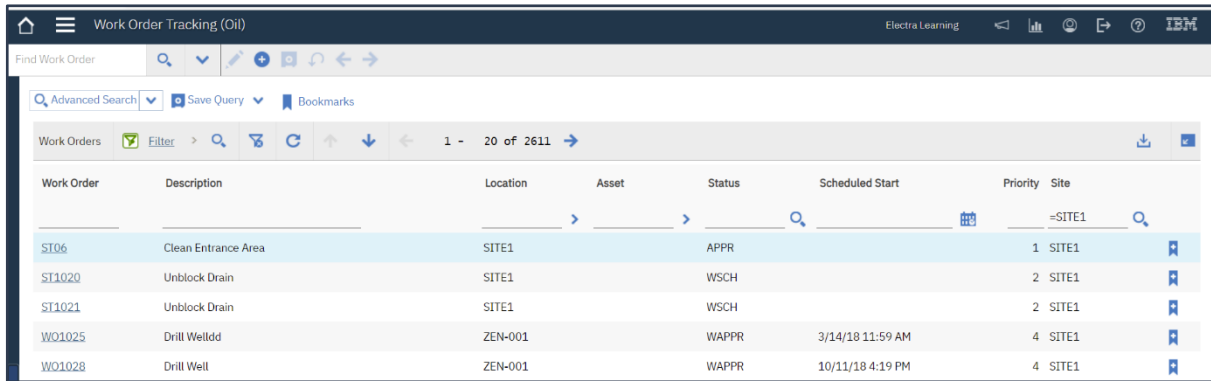
On the opening of any application, such as **Work Order Tracking (Oil)**, the **List** tab is always the first tab displayed. The **List** tab displays common search fields relevant to the current application.



The **List** tab toolbar contains buttons relevant to searching and are described in the table below:

Buttons	Description
	Toggle filter fields on/off.
	Filter table.
	Clear filter fields.
	Reload data.
	Navigate to previous/next row.
	Navigate to previous/next page.


To view all live records in the open application, leave all search fields blank and press **Enter/Return** on the keyboard or click the **Filter Table**  button.



Work Order	Description	Location	Asset	Status	Scheduled Start	Priority	Site
ST06	Clean Entrance Area	SITE1		APPR		1	SITE1
ST1020	Unblock Drain	SITE1		WSCH		2	SITE1
ST1021	Unblock Drain	SITE1		WSCH		2	SITE1
WO1025	Drill Welldd	ZEN-001		WAPPR	3/14/18 11:59 AM	4	SITE1
WO1028	Drill Well	ZEN-001		WAPPR	10/11/18 4:19 PM	4	SITE1



The system displays a list of data which generally contains more rows than a single screen can display. The navigation arrows may be used to view different pages of the results or alternatively, the filter options may be used to reduce the number of records displayed in a list.

The first 1-20 records are displayed, and the total number of records is shown.


Click the **Next Page**  and **Previous Page**  buttons to move through the pages of results.

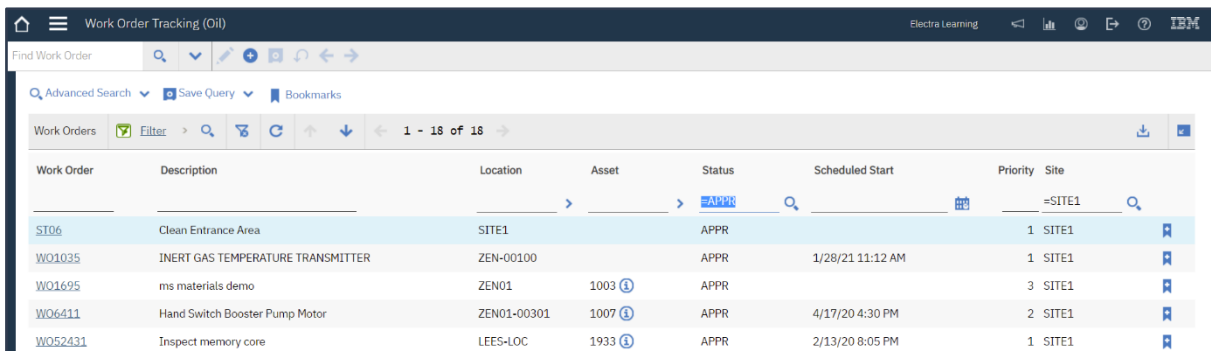
Single Search Criteria

Use the following steps to narrow search results down to match criteria entered into a single field.


Criteria may be typed into the chosen fields or alternatively, selected from criteria held within the **Select Value**  list or located via the **Detail**  menu. For example, to see all records with a status of **Approved (APPR)**:

1. Enter “=APPR” in the **Status** field.

Note: If the search fields are not visible, click the **Filter**  button to open.



Work Order	Description	Location	Asset	Status	Scheduled Start	Priority	Site
ST06	Clean Entrance Area	SITE1		APPR		1	SITE1
WO1035	INERT GAS TEMPERATURE TRANSMITTER	ZEN-00100		APPR	1/28/21 11:12 AM	1	SITE1
WO1695	ms materials demo	ZEN01	1003	APPR		3	SITE1
WO6411	Hand Switch Booster Pump Motor	ZEN01-00301	1007	APPR	4/17/20 4:30 PM	2	SITE1
WO52431	Inspect memory core	LEES-LOC	1933	APPR	2/13/20 8:05 PM	1	SITE1

2. Press **Enter/Return** on the keyboard or click the **Filter Table**  button and a list of all matching results is displayed.

Note: If no records match the search criteria, a **No Rows to Display** message will appear.



Clear Search Criteria


To clear all criteria from the search fields, click the **Clear Filter Fields**  button.

Multiple Search Criteria

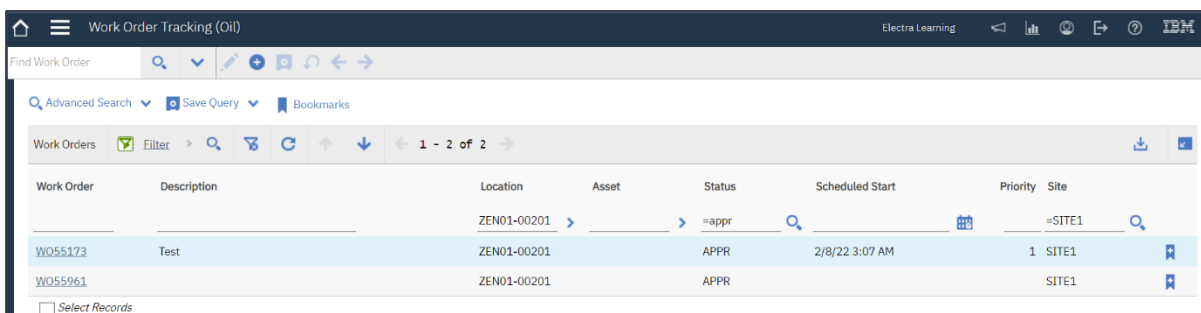
Search results can be narrowed down further by adding criteria to more than one search field.

Use the following steps to narrow search results down to match criteria entered into multiple fields.

Criteria may be typed into the chosen fields or alternatively, selected from criteria held within the **Select Value**  list or located via the **Detail**  menu. For example, to see all records with a status of **Approved (APPR)** and for the location **ZEN01-00201**:

1. Enter “=APPR” in the **Status** field.
2. Enter “ZEN01-00201” in the **Location** field.
3. Additional criteria can be entered into the remaining fields to further narrow the search.
4. Press the **Enter/Return** key on the keyboard or click the **Filter Table**  button.

A list of all matching results is displayed.



Work Order	Description	Location	Asset	Status	Scheduled Start	Priority	Site
		ZEN01-00201		=appr			=SITE1
W055173	Test	ZEN01-00201		APPR	2/8/22 3:07 AM	1	SITE1
W055961		ZEN01-00201		APPR			SITE1

Using Wildcards in a Search Field

A wildcard is a special character which can be used where only a partial search value is known. The wildcard is typed to replace one or more unknown characters in a search field.

Common Wildcards	Purpose
_ (underscore) and ? (question mark)	To substitute a single character.
% (percent)	To substitute a string of one or more characters.

To use the % wildcard in a search field, place it where the unknown character(s) should be e.g., in the **Work Order** description field.

Description Field	Outcome
%ring	This will find all instances where “ring” is at the end of a string of characters as in “bearing”.
ring%	This will find all instances where “ring” is at the start of a string of characters as in “rings”.
%ring%	This will find all instances where “ring” is anywhere in a string of characters as in “bearings”, “ringlet” or “spring”.

Using Conditional Operators in a Search Field

A conditional operator is a symbol (special character) which can be used to help refine searches.

Conditional Operator	Purpose
= (equals)	To find an exact match.
!= (not equal to)	To exclude a value.
~null~	To search for records containing no value (empty) in a specific field.

For example:

Status Field	Outcome
=WAPPR	This will only return instances where status value is exactly WAPPR .
!=WAPPR	This will return all instances where status does not equal WAPPR .

~null~	This will return all instances where the field is blank e.g., scheduled start date.
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Some conditional operators only apply to number or date fields.

Conditional Operator	Purpose
< (less than)	To return values less than the number or date given.
<= (less than or equal to)	To return values less than or equal to the number or date given.
> (greater than)	To return values greater than the number or date given.
>= (greater than or equal to)	To return values greater than or equal to the number or date given.

For example:

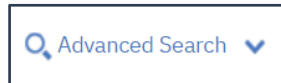
Target Finish Field	Outcome
<1/1/2021	This will return all instances where the target finish date is before 1/1/2021.
<=1/1/2021	This will return all instances where the target finish date is on or before 1/1/2021.
>1/1/2021	This will return all instances where the target finish date is after 1/1/2021.
>=1/1/2021	This will return all instances where the target finish date is on or after 1/1/2021.





Tip: The keyword TODAY can be used to refer to the current date, for example, <=TODAY in the Target Finish field would return all instances where the target finish was on or before today's date.


Advanced Searching

The **Advanced Search** option offers more fields to search from than in a standard List tab. The previously described searching criteria can also be used within the **Advanced Search** window.



Use the following steps to narrow search results down to match criteria entered into the advanced search fields.

Criteria may be typed into the chosen fields or alternatively, selected from criteria held within the **Select Value**  list or located via the **Detail**  menu. For example, to see all records with a status of **Approved (APPR)** and for the location **ZEN01-00100** and with a failure class of **IPTS**:

1. Enter “=APPR” in the **Status** field.
2. Enter “ZEN01-00100” in the **Location** field.
3. Enter “IPTS” in the **Failure Class** field.
4. Click **Find** .

Additional criteria can be entered into the remaining fields to further narrow the search.

The screenshot shows the 'Advanced Search' window with the following fields and values:

- Work Order: _____
- Description: _____
- Parent WO: _____ >
- Location: ZEN-00100 >
- Search Location Hierarchy: _____ >
- Asset: _____ >
- Configuration Item: _____ >
- PM: _____ >
- Classification: _____ >
- Repair Facility: _____ >
- Repair Facility Site: _____ 🔍
- Problem Code: _____ 🔍
- Failure Class: IPTS >
- Subunit/Component Code: _____
- Maintainable Item/Part Code: _____
- Safety Failure Category: _____ 🔍
- Hardware Failure Mode: _____ 🔍
- Service Group: _____ >
- Service: _____ 🔍
- Vendor: _____ >
- Originating Record: _____ >
- Originating Record Class: _____ 🔍
- Risk Assessment: _____
- Loss Reference: _____
- Crew Work Group: _____ >
- Work Type: _____ 🔍
- Status: =appr 🔍
- Class: =WORKORDER 🔍
- Site: =SITE1 🔍
- History? N 🔍
- Priority: _____
- Is Task? N 🔍
- Safety Critical? _____ 🔍
- Review Required? _____ 🔍
- Project Stage Gate: _____ 🔍
- Gatekeeper: _____ >
- Contingency Plan? _____ >

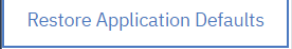
Buttons at the bottom: **Find**, **Restore Application Defaults**, **Revise** (dropdown), **Cancel**.

Historical Records

When records are closed or cancelled, they become **Historical** and will not be displayed in any simple or advanced search. The **History?** field is set to “No” shown by the letter “N” by default. This excludes all historical or cancelled records from the search.

Entering the letter “Y” meaning “Yes” into the **History?** field will return historical records only. Leaving the **History?** field blank will return all records including both live and historical.

If the **Advanced Search** function has been used, the filter fields can be cleared by using the

Restore Application Defaults  option from the advanced search screen.

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