

## Today's Training Agenda

FMAX website: <https://test.mms.indiana.edu/fmax-stg>

### Users Log in

Network ID not case sensitive  
No FMAX password

### Work Desk

Module Menu  
Work Management Menu

### WO Screen

Description  
Category  
Requestor  
add phase

### Phase Screen

Shop  
Shop person  
Priority  
Accounting

### Accounting Screen

Shop  
Custom  
Adding account

### Questions

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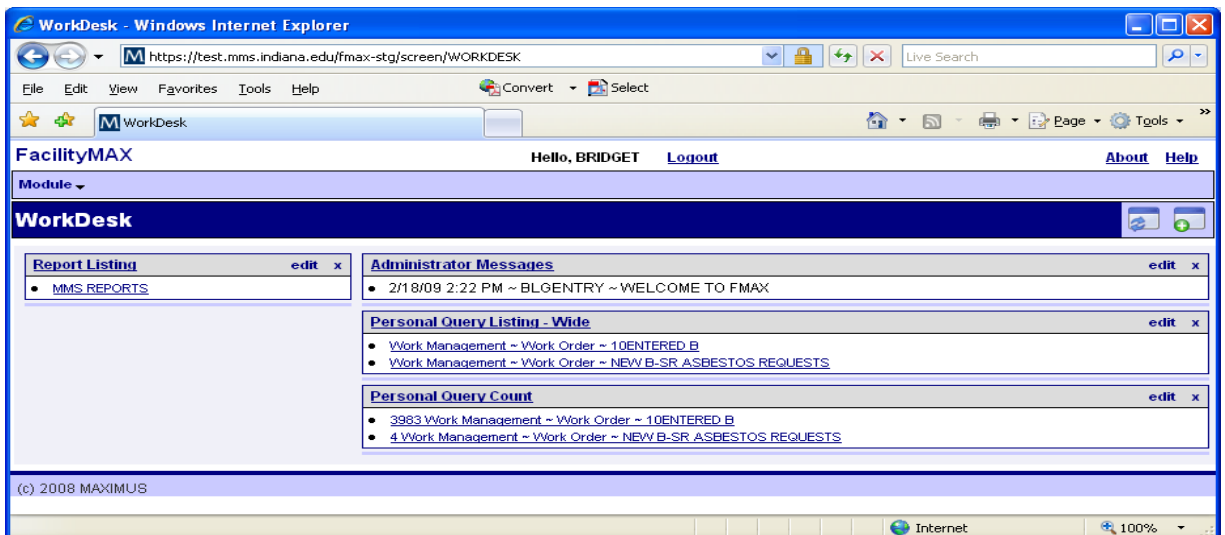
812-856-2407  
Pager: 812-337-4710

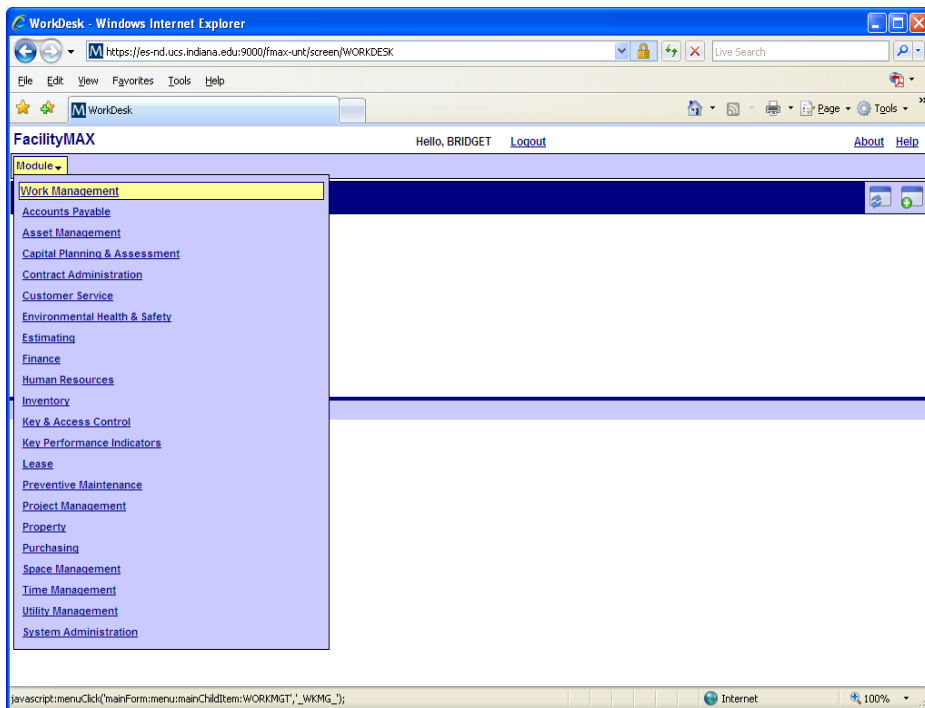
# Log in

Below you will see the FMAX log in screen. You will use your network id and password. You will not have a separate log in for MMS.

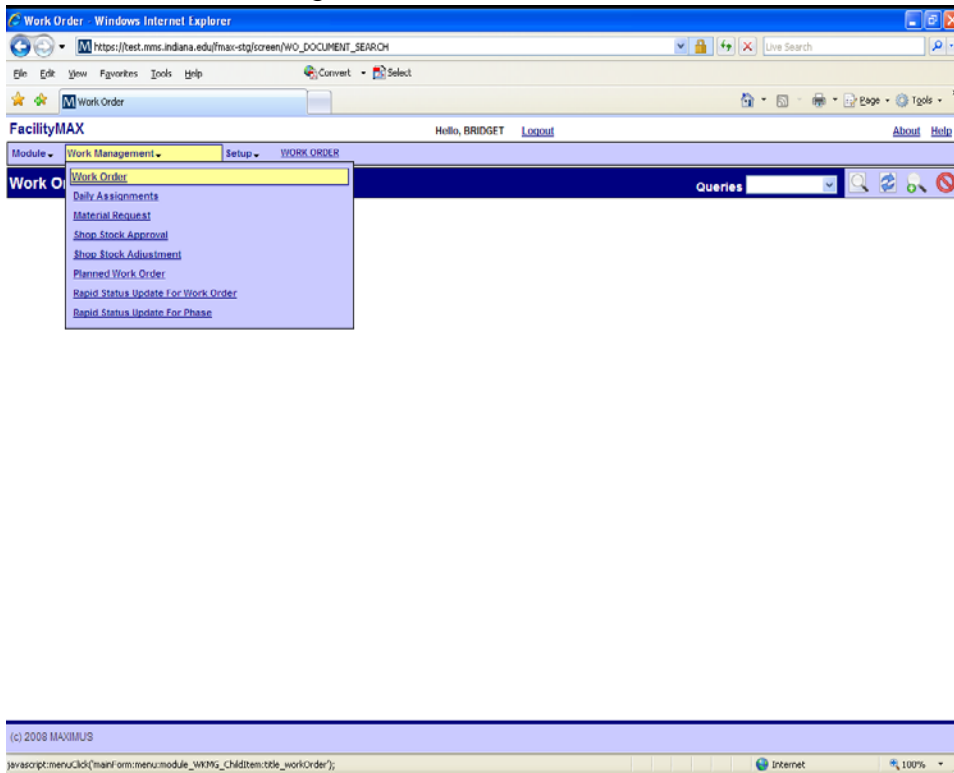


After you log into MMS you will see what we call a WORK DESK. Your work desk is a page that can sum up the activity in MMS that relates to you. If you have reports that you run regularly, you can access them from here. If you have user filters on your searches, they can show up on this page. If there is a message that we as administrators need to get out to all users, you will see it at the top under Administrator Messages.



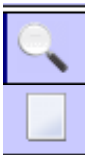


The picture above shows the Module menu. You will only see modules that you have access to. As you can see, I have full access so the full list shows up. Click on Work Management.



You should now see a work management menu just to the right of the Module Menu. Click on Work Order

This is what the new work order page looks like. You no longer have to scroll left and right, only up and down. Over in the upper right corner you will notice 2 icons.



The magnifying glass is your search icon

The sheet of paper is your insert or new icon.

Lets create a new work order. Start by clicking on the New icon in the upper right corner of your screen.

You should now see a blank work order with several red boxes and a number in the yellow work order field. The work order number is highlighted .

**Work Order - Windows Internet Explorer**

https://test.mms.indiana.edu/fmax-stg/screen/WO\_EDIT

File Edit View Favorites Tools Help

Work Order

FacilityMAX Hello, BRIDGET Logout About Help

Module Work Management Setup Reports

**Work Order** View: Select

Work Order: **1200302** Created By: BL GENTRY Date Created: Mar 02, 2009 07:27 AM

Description: [Red Box]

Status: [Red Box]

Project: [Red Box]

Desired Date: [Red Box]

Budget: \$0.00

**Organization**

Organization: [Red Box]

Requestor: [Red Box]

Contact: [Red Box]

Contact Phone: [Red Box]

Contact Email: [Red Box]

**Property**

Region: [Red Box]

Facility: [Red Box]

Property: [Red Box]

**Classification**

Problem Code: [Red Box]

Type: B [Red Box]

BLOOMINGTON PHYSICAL

Category: [Red Box]

**Phase**

Phase	Description	Location	Shop	Work Code	Priority	Status
[Empty Row]						

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Done

Fill out your Work Order Description. Jump down to fill out your category. (lower right side of the screen) If you click on the small magnifying glass beside your TYPE you will see a list of categories to choose from. I'm going to choose B-SR in this case.

**Category - Windows Internet Explorer**

https://test.mms.indiana.edu/fmax-stg/screen/ZOOM\_WORKORDER\_CATEGORY?keepView=true

Category

Work Classification

Category	Description
<a href="#">B-AR</a>	BPP OUTSIDE REPAIR/SERVICE REQUEST
<a href="#">B-BSD</a>	BPP BUILDING SERVICES REQUEST
<a href="#">B-INS</a>	BPP INSURANCE RELATED REQUEST
<a href="#">B-NC</a>	BPP NO CHARGE REQUEST
<a href="#">B-PM</a>	BPP PREV MAINT NON-GENERATED REQUEST
<a href="#">B-PND</a>	BPP PENDING WORK ORDER
<a href="#">B-PRV</a>	BPP PREVENTIVE MAINTENANCE GENERATED REQUEST
<a href="#">B-RRG</a>	BPP REPAIR AND RENOVATIONS, GENERAL
<a href="#">B-RR</a>	BPP REPAIR & RENOVATIONS, INFRASTRUCTURE RELATED
<a href="#">B-SR</a>	BPP SERVICE REQUEST

Page 1 of 2

Records Found = 14

Internet 100%

Work Order - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/WO\_EDIT

File Edit View Favorites Tools Help

Work Order

FacilityMAX Hello, BRIDGET Logout About Help

Module Work Management Setup Reports

Work Order View: Select

Work Order	1200302	Created By	BLGENTRY	Status	10-ENTERED
Description	This is a work order for training	Date Created	Mar 02, 2009 07:27 AM	Project	
				Desired Date	
				Budget	\$0.00

<b>Organization</b> Organization Requestor Contact Contact Phone Contact Email	<b>Property</b> Region Facility Property	<b>Classification</b> Problem Code Type BLOOMINGTON PHYSICAL Category BPP SERVICE REQUEST
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Phase

Phase	Description	Location	Shop	Work Code	Priority	Status

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Done Internet 100%

Next, fill in the requestor. The requestor is what you used to enter into the Customer field in Facility Focus. We are using B-119 in this example. Click on the small magnifying glass on Organization just above requestor and the information should auto fill.

Work Order - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/WO\_EDIT

File Edit View Favorites Tools Help

Work Order

FacilityMAX Hello, BRIDGET Logout About Help

Module Work Management Setup Reports

Work Order View: Select

Work Order	1200302	Created By	BLGENTRY	Status	10-ENTERED
Description	THIS IS A WORK ORDER FOR TRAINING	Date Created	Mar 02, 2009 07:27 AM	Project	
				Desired Date	
				Budget	\$0.00

<b>Organization</b> Organization Requestor Contact Contact Phone Contact Email	<b>Property</b> Region Facility Property	<b>Classification</b> Problem Code Type BLOOMINGTON PHYSICAL Category BPP SERVICE REQUEST
---	---	--

Phase

Phase	Description	Location	Shop	Work Code	Priority	Status

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Done Internet 100%

If you have a project number you can put that in just under the status. Problem code is not the same in FMAX as it was in Facility Focus so you will not be filling in the Problem code on the work order.

Now we are ready to add our first phase. At the bottom of your screen click on the green plus sign. This will bring up a blank phase screen.

Here you will add a shop, shop person, and priority. You can click on the magnifying glass by the shop to choose a shop or you can type in the name. This time I will type in the shop name. b-electric and then click the magnifying glass. By typing in the name, it will not bring up the zoom table.

I will now click on the zoom magnifying glass for shop person to see who I can assign to the phase.

Shop Person	First Name	Last Name	Shop
<a href="#">AWDAGLEY</a>	ALCIDE	DAGLEY	B-ELECTRIC SHOP
<a href="#">BDMANN</a>	BRIAN	MANN	B-ELECTRIC SHOP
<a href="#">BFOSTER</a>	BARRY	FOSTER	B-ELECTRIC SHOP
<a href="#">BFRANKLA</a>	BRADLEY	FRANKLAND	B-ELECTRIC SHOP
<a href="#">BGAZVODA</a>	BRUCE	GAZVODA	B-ELECTRIC SHOP
<a href="#">DDAYHUFF</a>	DONALD	DAYHUFF	B-ELECTRIC SHOP
<a href="#">DLCRIDER</a>	DIANE	CRIDER	B-ELECTRIC SHOP
<a href="#">DWYOUNT</a>	DAVID	YOUNT	B-ELECTRIC SHOP
<a href="#">GRM</a>	GREG	MARTIN	B-ELECTRIC SHOP
<a href="#">JAPTAYLO</a>	JAY	TAYLOR	B-ELECTRIC SHOP

I chose DDAYHUFF for this phase. Now I can choose a priority. Zoom on the priority and choose the priority for this phase.

Phase - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/PHASE\_EDIT

File Edit View Favorites Tools Help

Phase

FacilityMAX Hello, BRIDGET Logout About Help

Module Work Management Setup Reports

Phase View: Select

Phase 001 Created By BLGENTRY Date Created Mar 02, 2009 07:49 AM Status 10-ENTERED

Description THIS IS A WORK ORDER FOR TRAINING Work Order 1200302 Budget \$0.00 Location

Shop Shop B-ELECTRIC SHOP Shop Person DDAYHUFF DONALD DAYHUFF Priority B-03-ROUTE

Estimated Dates Start End

Classification Funding Source Shop Work Code Group Work Code Request Method

Equipment Equipment Equipment Group Template PM Standards

Asset Asset Asset Type Asset Group

Contractor Type

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Done

Now we need to choose our funding source. If this is just a maintenance charge and you do not have a customer account number, choose Shop on the funding source field. This defaults to the shop accounts. If you are asking for a customer account number you need to choose custom. Since shop is fairly straight forward, lets look at custom on this example. Before we define the account number, choose a work code. You can click on the zoom icon to see your choices.

Work Code - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/ZOOM\_WORK\_CODE\_FOR\_PHASE?keepView=true

Work Code

Work Code	Description	Type	Category
<a href="#">B-ADMIN</a>	BPP ADMIN (B-SR)	B	B-SR
<a href="#">B-ASBESTOS</a>	BPP ASBESTOS ABATEMENT (B-SR)	B	B-SR
<a href="#">B-BLDG SERVICES</a>	BPP BUILDING SERVICES (B-SR)	B	B-SR
<a href="#">B-CAMPUS</a>	BPP CAMPUS - GROUNDS WORK (B-SR)	B	B-SR
<a href="#">B-CARP-LOCK</a>	BPP LOCKSHOP WORK (B-SR)	B	B-SR
<a href="#">B-CARP-PAINT</a>	BPP CARPENTRY PAINT WORK (B-SR)	B	B-SR
<a href="#">B-CARP-UNIT 1</a>	BPP CARPENTRY UNIT 1 WORK (B-SR)	B	B-SR
<a href="#">B-CARP-UNIT 2</a>	BBP CARPENTRY UNIT 2 WORK (B-SR)	B	B-SR
<a href="#">B-CARP-UNIT 3</a>	BPP CARPENTRY UNIT 3 WORK (B-SR)	B	B-SR
<a href="#">B-CARP-UNIT 4</a>	BPP CARPENTRY UNIT 4 WORK (B-SR)	B	B-SR

Ok, now that we have custom in the funding source and a work code in place, we need to add account numbers. To do this, go to the top of your page where you see a drop down box that says Select . From this menu, choose Account Setup.

Phase - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/PHASE\_EDIT

File Edit View Favorites Tools Help Convert Select

Phase

FacilityMAX Hello, BRIDGET Logout About Help

Module Work Management Setup Reports

Phase

Phase 001 Created By BLGENTRY Date Created Mar 02, 2009 07:49 AM

Description THIS IS A WORK ORDER FOR TRAINING

Shop Shop B-ELECTRIC SHOP Shop Person DDAYHUFF Priority B-03-ROUTE

Estimated Dates Start End

Equipment Equipment Equipment Group Template PM Standards

Asset Asset Asset Type Asset Group

Contractor Type

View: Select

Account Setup

You should now see an Account set up screen. To add an account click on the green plus sign on the charge account line.

Account Setup - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/PHASE\_ACCT\_SETUP\_EDIT

File Edit View Favorites Tools Help Convert Select

Account Setup

FacilityMAX Hello, BRIDGET Logout About Help

Module Work Management Setup Reports

Account Setup

Phase 001 Created By BLGENTRY Date Created Mar 02, 2009 07:49 AM

Description THIS IS A WORK ORDER FOR TRAINING

Funding Source Custom Budget \$0.00 Work Order 1200302

Charge

Account	Subcode	Percentage	Precedence	Amount	Start Date	Expire Date
Add Account						

Offset

Account	Subcode	Start Date	Expire Date
Add Account			

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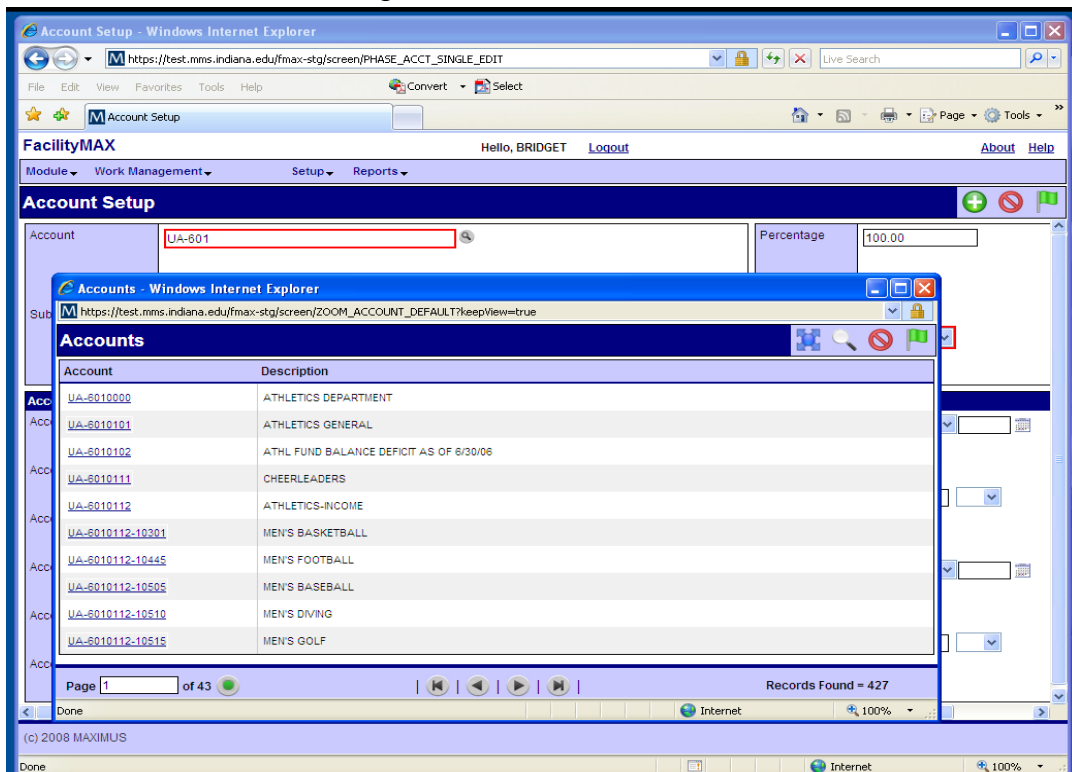
Done

Internet 100%

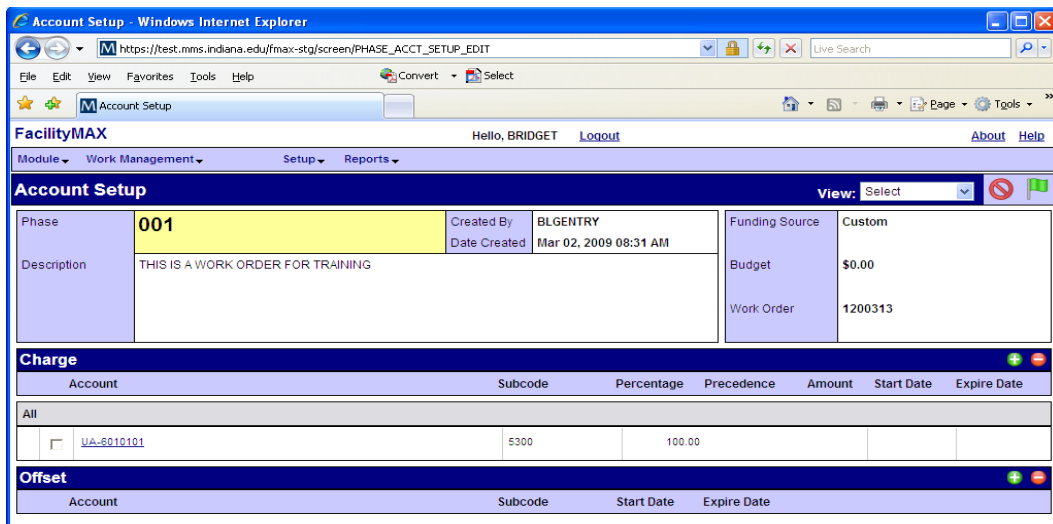
Now you need to choose Percentage split or Fixed Account. Most of the time you will use percentage split. Even if you are only using one account for 100% of the charges on this phase. Click on the percentage split and click the large blue arrow on the top right of the screen to go to the next step.

You can put in the account number and click the magnifying glass. If you need to search for the account, you can click on the zoom. I suggest at least entering the first letters of the account if you have them to narrow the number of choices you have.

Here I have entered UA-601 and clicked the zoom. You can see that there is a large list of accounts. If you have the full account number, you can just enter it and when you click the magnifying glass it will decode the account name. Next you can put in the sub code (OBJECT CODE) or click on the zoom to find it. Then click on the Green flag.



Now that the charge account is done, can click on the green flag again and it will take you back to the Phase. Do not enter an account for Offset account.. If you need to add another phase, you can click on the large green plus icon at the top of your phase screen. If you are done, click on the green flag to go back to the work order. Make sure you click save.



Once you have clicked save, the work order is complete.

Work Order - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/WO\_VIEW

File Edit View Favorites Tools Help

Work Order

FacilityMAX

Hello, BRIDGET Logout About Help

Module Work Management Setup Reports

Work Order View: Select

Work Order	1200313	Created By	BLGENTRY	Status	10-ENTERED
Description	THIS IS A WORK ORDER FOR TRAINING	Date Created	Mar 02, 2009 08:30 AM	Project	
				Desired Date	
				Budget	\$0.00

<b>Organization</b>	<b>Property</b>	<b>Classification</b>
Organization	Region	Problem Code
BL-HPER	BL	
BLOOMINGTON-HEALTH, PHYS ED & RECREATION	BLOOMINGTON	
Requestor	Facility	Type
B-119	HPER BUILDING	B
JOHN PEDERSEN	1025 E 7TH ST	BLOOMINGTON PHYSICAL
Contact	Property	Category
JOHN PEDERSEN	BL 119	B-SR
Contact Phone	HPER BUILDING	BPP SERVICE REQUEST
Contact Email		

Phase						
Phase	Description	Location	Shop	Work Code	Priority	Status
001	THIS IS A WORK ORDER FOR TRAINING		B-ELECTRIC SHOP	B-ELEC-SHOP	E-3-ROUTINE	10-ENTERED