FMAX

Work Orders Entry

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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

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.
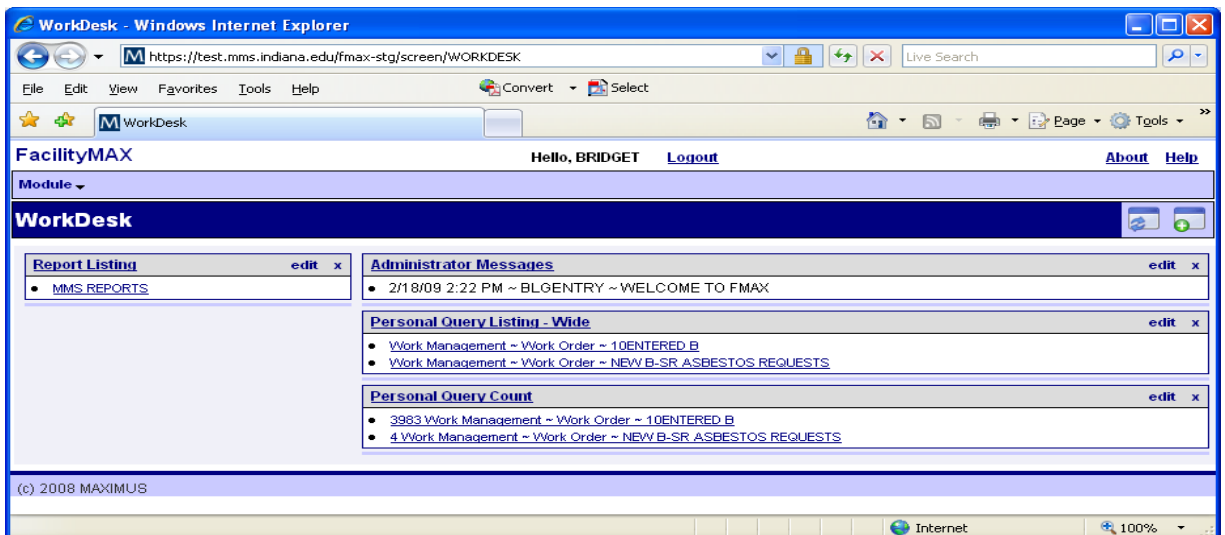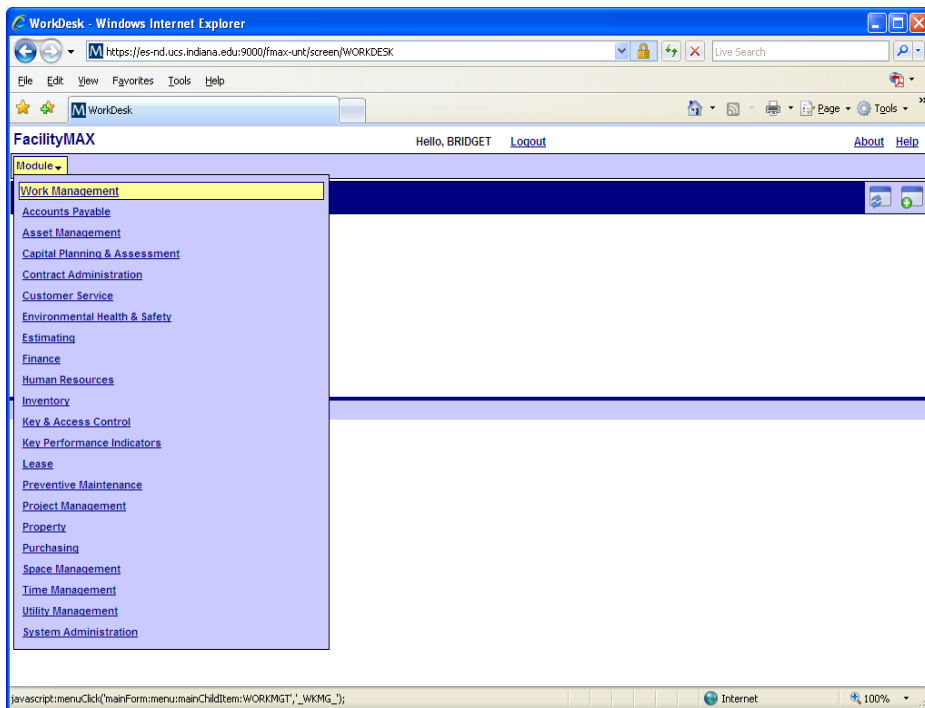
The picture above shows the Module menu. You will only see modules that you have access to. As you can see, I have full access so the full list shows up. Click on Work Management.
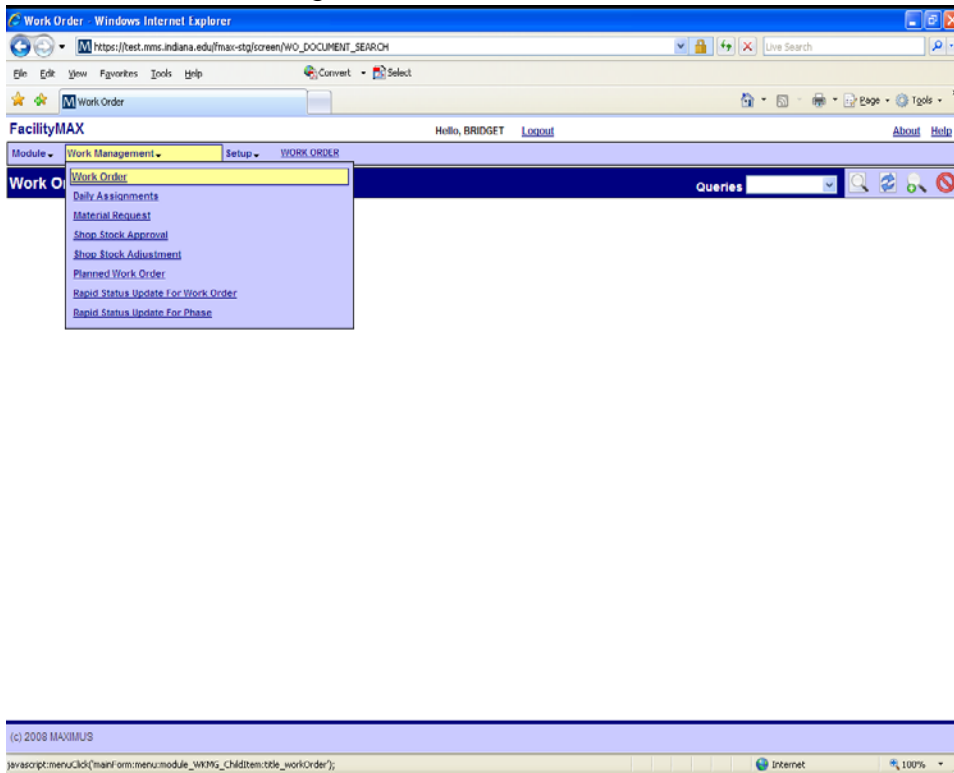
You should now see a work management menu just to the right of the Module Menu.   Click on Work Order

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.
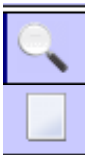
The magnifying glass is your search icon

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 .

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.

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.

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.

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

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.

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.

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

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 an put in the sub code (OBJECT CODE) or click on the zoom to find it. Then click on the Green flag.
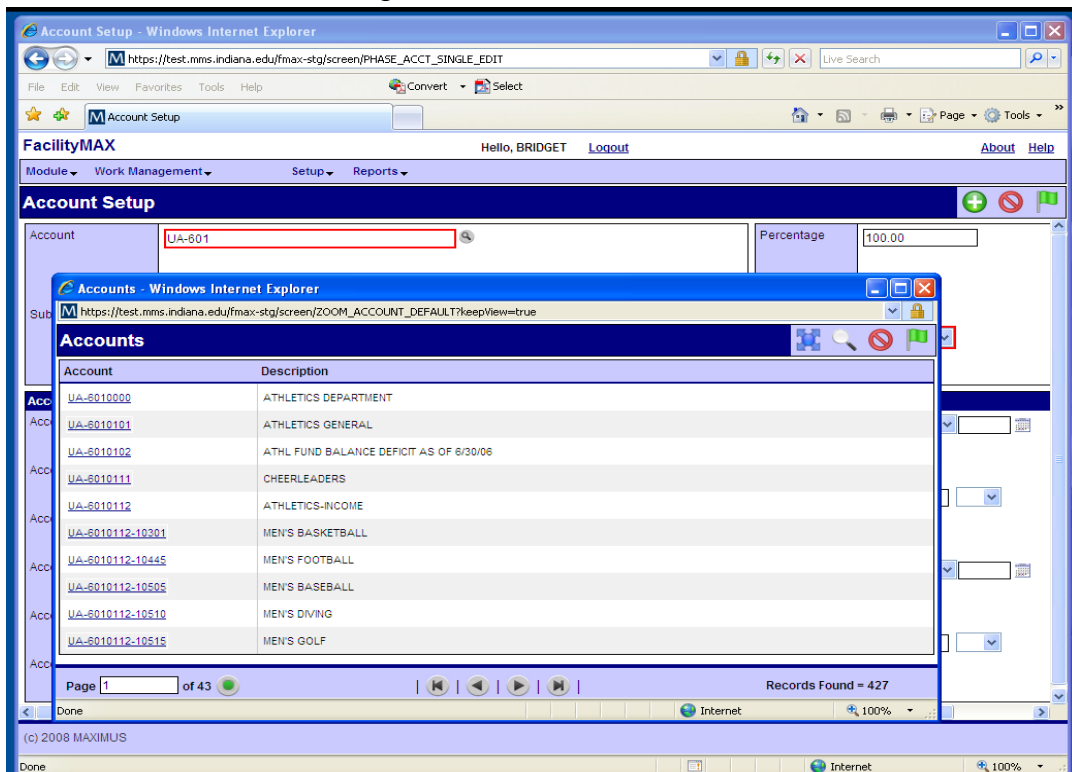
Now that the charge account is done, can click on the green flag again and it will take you back to the Phase. Do not enter an account for Offset account.. If you need to add another phase, you can click on the large green plus icon at the top of your phase screen. If you are done, click on the green flag to go back to the work order. Make sure you click save.
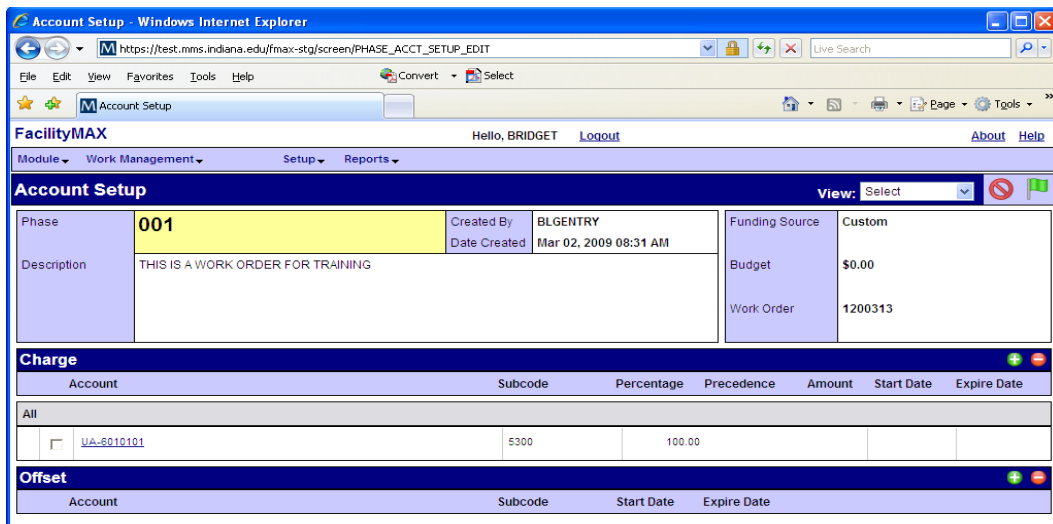
Once you have clicked save, the work order is complete.