## **MMS**

# Navigation, Searching User Filters & Printing

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#### **Today's Training Agenda**

MMS website: <a href="http://www.indiana.edu/~mmswebpg/">http://www.indiana.edu/~mmswebpg/</a>
FMAX website: <a href="https://test.mms.indiana.edu/fmax-stg">https://test.mms.indiana.edu/fmax-stg</a>

#### **Navigation**

Users Log in

Network ID not case sensitive

No FMAX password

The look and drill down

The work desk

Filters and Report listing

The buttons

FMAX Icons

#### Searching

Searching improvement

Create your own report (mention)

#### **User Filters**

Creating User Filters or Queries Create your own report (mention) How it looks on the work desk

#### **Updating Work Orders**

Edit icon Status

Phase drill down

#### **Printing**

Steps of Printing a work order

#### Questions

### **FMAX Icons**

#### **Scroll Buttons**

First	•
Previous	
Go	
Next	
Last	<b>(+)</b>

#### Desktop

Deskiop	
Up	4
Down	-
Right	-
Left	4
Zoom In	
Zoom Out	
Zoom Reset	

#### **Browse Page Buttons**

First Browse	4
Previous Browse	
Go Browse	
Next Browse	
Last Browse	<b>(*)</b>

#### **Detail Buttons**

Detail Duttons	
Add Detail	<b>e</b>
Delete Detail	
Add Note	
Filter Detail	<b>P</b>
Clear Filter Detail	

#### **Dialog Buttons**

Yes	$\checkmark$
No	

#### Toolhar Buttons

Toolbar Buttons	
Execute Search	9
Reset	
Add Query	
Delete Query	
Back to Browse	•
Search	्
Refresh	3
Quick Filter	
New	
Edit	X
Delete	8
Save	14.4
Cancel	
Done	
Zoom Next	<b>→</b>
Error Log	<b>.</b>
Clear	3
Show All	8
CAD Viewer	
Approve	5
Reject	<b>-</b>
Generate	8
Save Query	H
Сору	
New Detail	T-
Load Timecard	
Print	=
Print Dialog	=
CSV	1.1

#### **Launch Buttons**

Zoom	
Zoom	12.5
Calendar	

## **Miscellaneous Buttons**

Miscellaneous Buttons		
Attach	16	
Login	Login 🖲	
Snapshot	Ties.	

## Profile Picture Component Buttons

Delete Profile	
Add Profile Picture	*

## **Tips and Tricks**

When you are using FMAX, you must turn off your Pop up blocker or some windows will not show up. If you need assistance with this please call your MMS Contact Person.

When you edit any kind of record, you must click on edit on the main page before you drill down into the detail.

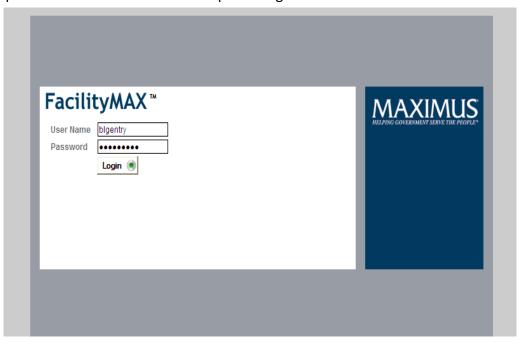
Examples: Click edit on Work order before you click on phase.

Click edit on purchase order before you click on the line item to make changes.

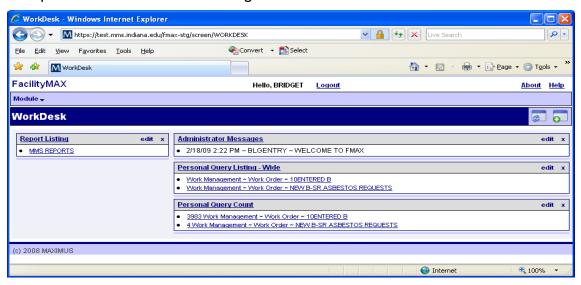
MORE TO COME.....

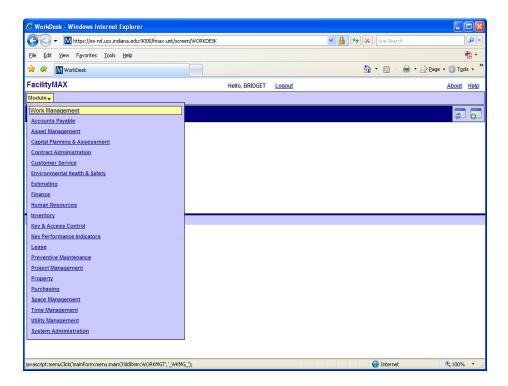
## **Navigation**

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.



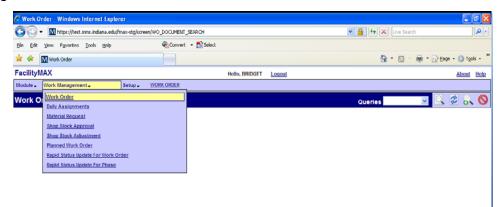
After you log into MMS you will see what we call a WORK DESK. Your work desk is a page that can sum up the activity in MMS that relates to you. If you have reports that you run regularly, you can access them from here. If you have user filters on your searches, they can show up on this page. If there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



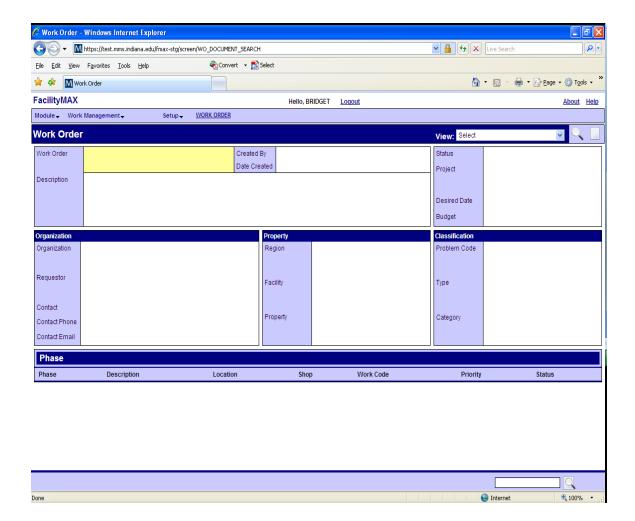


The picture above shows the Module menu. You will only see modules that you have access to. As you can see, I have full access so the full list shows up.

In Facility Focus you had a menu that you clicked on the left side and then on the right side. This is similar. You have the module menu and once you click on it, you have a screen menu on the right of it. Click on Work Management. Now you will have a Work Management menu just to the right of the module menu.



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. Over in the upper right corner you will notice 2 icons.

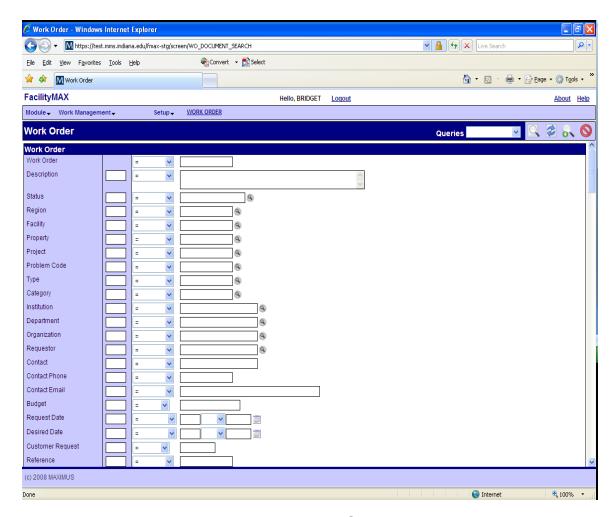


The magnifying glass is your search icon

The sheet of paper is your insert or new icon.

Lets start out by doing a search in the work order screen. You will need to click on the magnifying glass in the upper right corner.

## Searching



You should now see the search screen. Searching in FMAX is much more user friendly than it was in facility focus. If you notice in the upper right corner you will see 4 icons.



The magnifying glass is the execute search icon.



The two blue arrows is the reset icon.

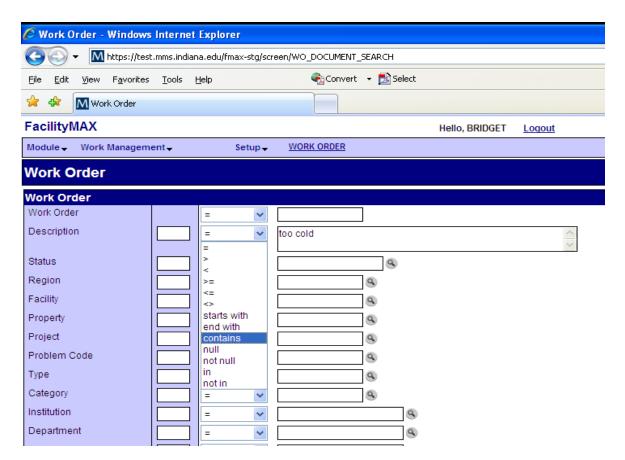


The magnifying glass with the green plus sign is the add query icon



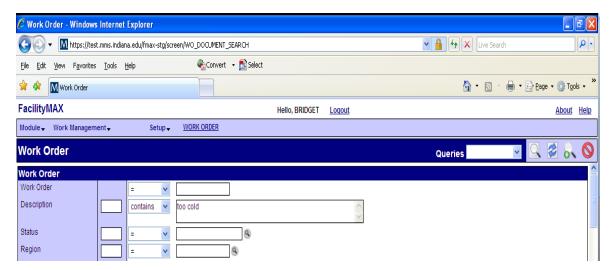
The red circle with the line through it is the cancel icon.

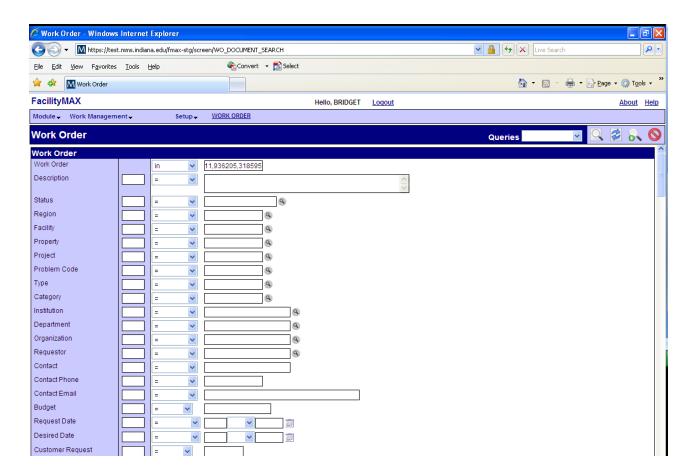
You will also notice just to the left of your icons a drop down box that is labeled Queries. Once you have created some of your own searching filters (or queries) they will be listed in this box.



You will notice on this page that I have trimmed the images so that I could show you a bigger view of your searching options.

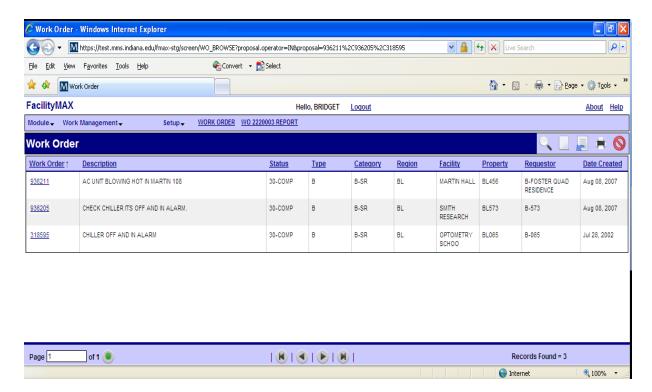
This will make searching for work orders much easier. If you know that you had a work order that had the words "too cold" in the description, you can choose **Contains** from the drop down menu and type too cold inside the description box. I've done this below. You can now click the magnifying glass to execute the search.



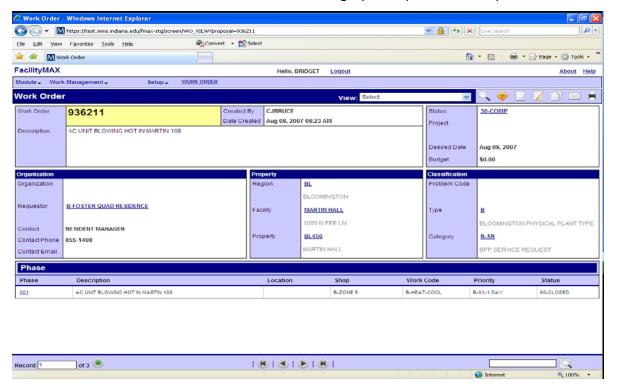


If you are looking for more than one work order at once, you will need to choose in from the drop down menu. Then you can put the first number in the work order blank, use a comma and put the next work order. Do not use a space between the work order and the comma. I have done this above. Once you have the work order numbers all in the box you can click on the magnifying glass (execute search) icon.

<sup>\*\*</sup>As a side note, please notice that several of the fields above have a zoom icon beside them. A small magnifying glass beside them in a grey circle. You can look up the available options for that blank by clicking on the zoom icon. The dates also have a small calendar to the side of them. You can click on the calendar then click on a date and it will fill in the blank for you.\*\*



Here are the results from the search of multiple work orders. Once you click on the execute search, the results will come back in a list as they did in facility focus. You can click on the work order number on the left to bring up that particular request.

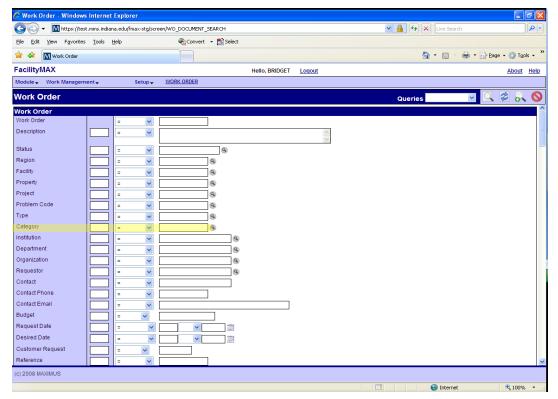


In this case I chose the first work order listed. 936211.

## **User filters or Queries**

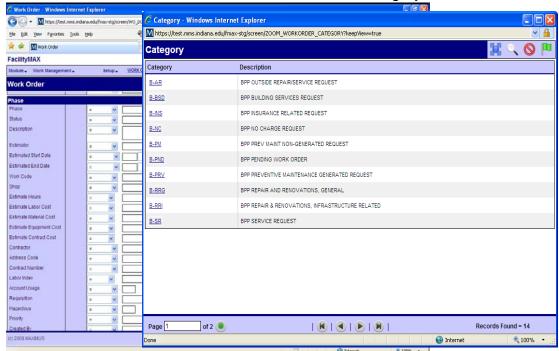
Now that you know how to search, I want to show you how to create filters. Many of you have filters set up in facility focus. When you click on search it will show you a box with search options. Filters are a little bit different now so lets walk through making one. Start out by going to the Work order screen and clicking on the search icon (the magnifying glass) in the upper right corner.

As a reminder, to get to the work order screen, go to: <a href="https://test.mms.indiana.edu/fmax-stg">https://test.mms.indiana.edu/fmax-stg</a>, log in with your network id/password, choose work management from the Module menu, and choose work order from the work management menu.

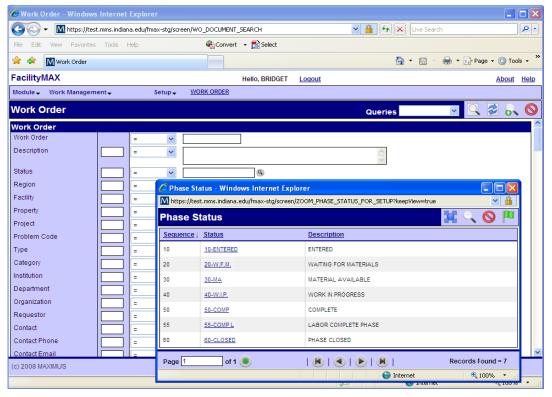


For our first filter we will be searching for a new work order in a particular shop. Once I am on the search screen, I will fill in the category first by clicking on the zoom icon (the small magnifying glass) I have highlighted category above. Then I will scroll down to the phase section of the search. We will then fill in the shop and status.

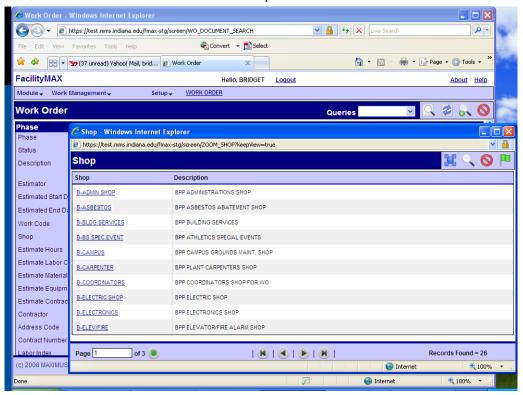
Start with the category since it is first on the search list. Find the category field and click on the zoom icon. This will bring a pop up box. Choose the category that you plan to search for. In this case I will search for the B-SR category.



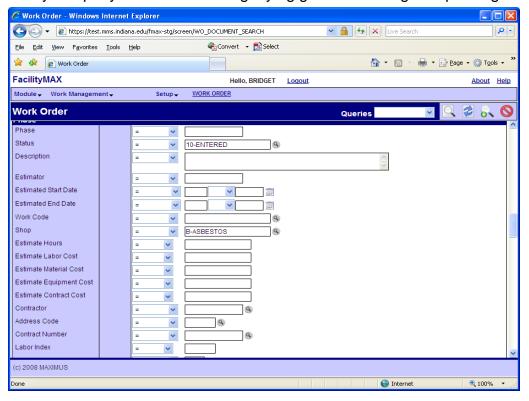
After you have chosen the category, scroll down to the phase status and click on the zoom icon (the small magnifying glass) You will see a window pop up with status choices. In this case we will choose 10-ENTERED.



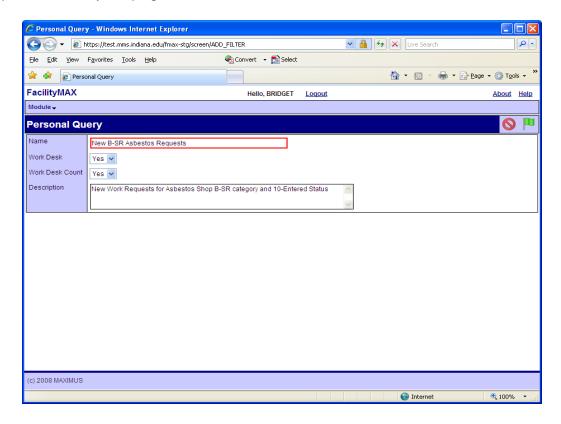
Now that you have the phase status, lets choose the correct shop. In this case I will choose the asbestos shop.



Once you have filled in the fields you want to include on the search, you can now add your query. Click on the magnifying glass with the green plus sign.

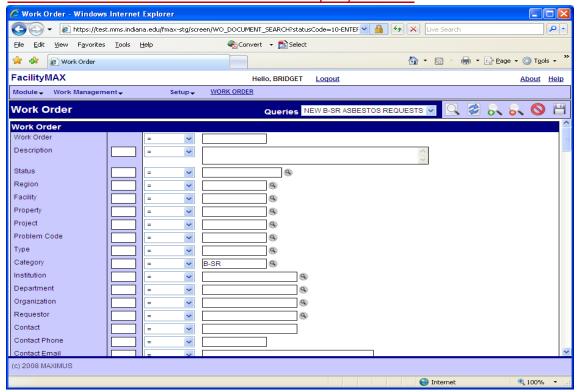


On this screen you will need to name your filter. We will call this New B-SR Asbestos requests. Below the name you can choose yes or no for this report to show up on your work desk. You can also choose yes or no for it to be on the work desk with a count. The difference between those is, just showing a link on your work desk or showing a link that tells you how many new requests there are before you click the link. For this example I am choosing yes for both so that I can show you how they appear. You will not need yes on both of these. Then you will need to put in a description of this filter. I just described the filter in more detail. When you are finished, click on the green flag in the right upper corner of your page.

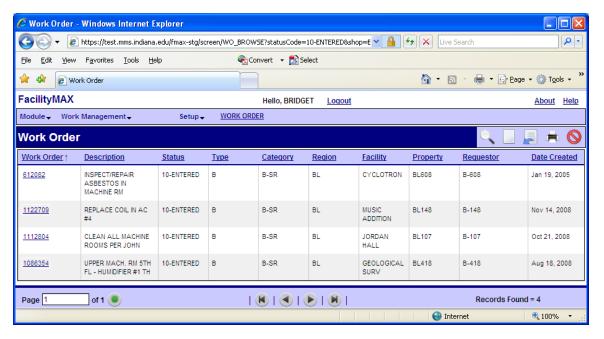


Clicking the green flag will bring you back to the search screen. Notice that your new filter (or query) is listed in the Queries box at the top of your screen.

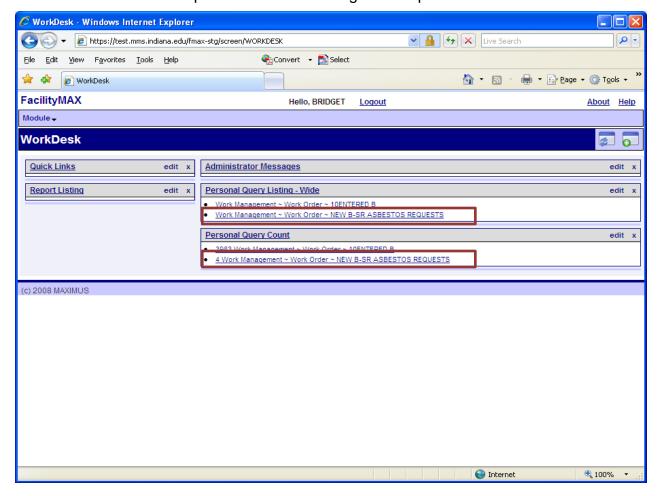
YOU MUST click on the SAVE icon for this query to save.



Once you have clicked on the save icon, you can test your query by clicking on the execute search icon. The plain magnifying glass.

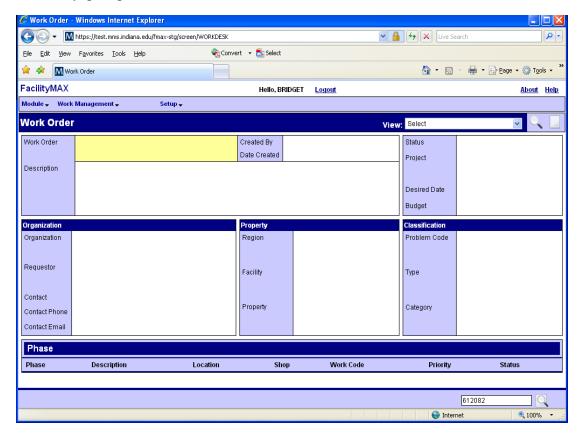


You can go back to the work desk to see your query listing by clicking on the blue Facility MAX words in the upper left corner of the page. You can see below that I have put a box around the query that we added to the work desk. Notice that the query is listed in the personal query listing and the personal query count. The personal query count has the number of new B-SR Asbestos requests right on the link. There are 4 new requests. The other listing doesn't provide that count.



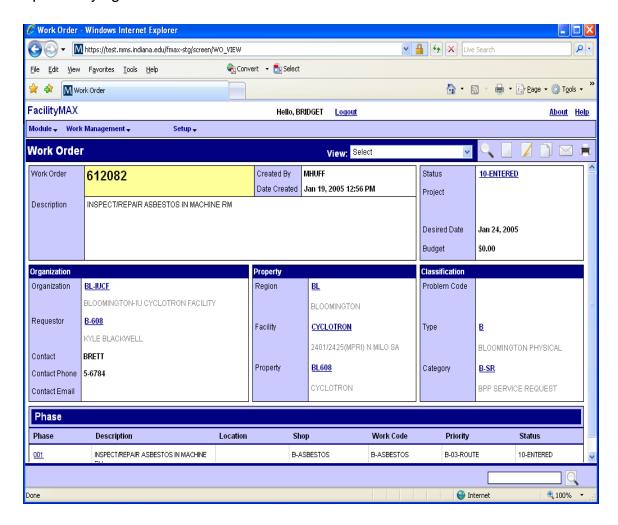
## **Updating Work Orders**

When you need to update a work order (the status for example) you will need to start by doing a search for the work order number. For this example I will use the asbestos order 612082. There are 3 ways we can look for this request. We can run the filter we set up to find it among other new work orders for asbestos. We can click on the magnifying glass and go to the search screen OR since we know the exact number, we can put it into the box at the bottom right corner of the page. Since you have already seen the filter and the search page, I will find this one by using the white box at the bottom right of the page. Start by going to the Work order screen.

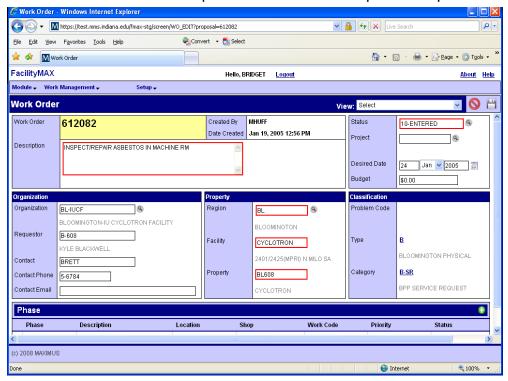


You will notice on this screen that I have entered 612082 into the box on the bottom right hand of the screen above. There is a magnifying glass next to that, click on it and it will find the work request for you.

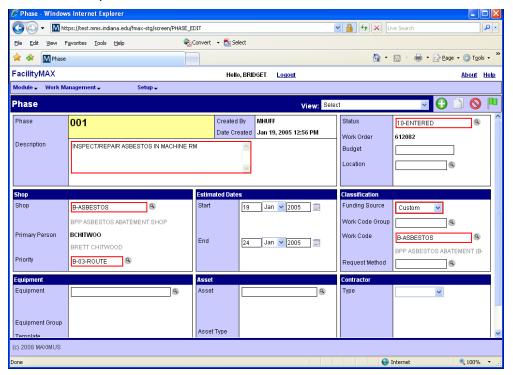
So now we have the work order that we need click on the edit icon. Please note that if you are editing the phase only, you still have to click the edit icon before you click on the phase. The edit icon is the sheet of paper with a pencil laying on it.



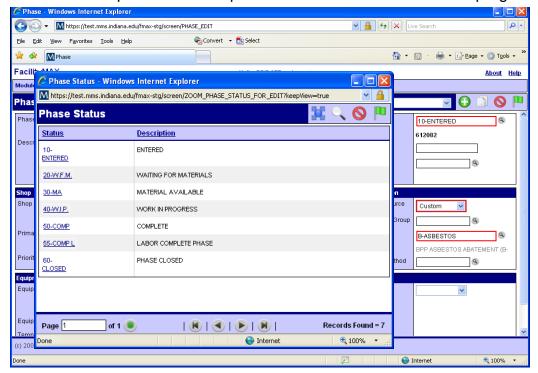
Notice that once you have clicked on the edit icon, some fields have red boxes around them. Lets click on the phase so that we can update the phase status.



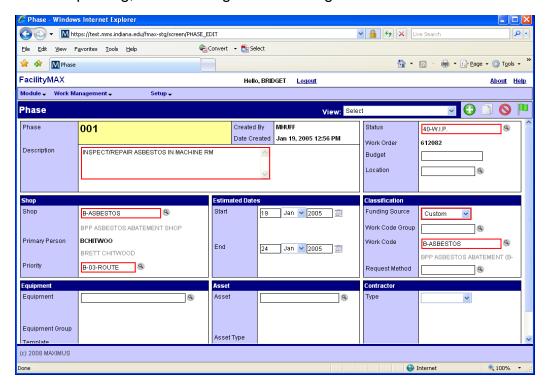
#### Here is the phase screen in edit mode



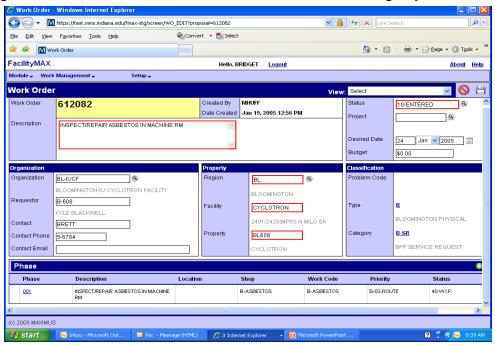
Click on the magnifying glass next to status. This will bring up the choices of phase statuses to pick from. Lets put this work order in WIP Work in progress.



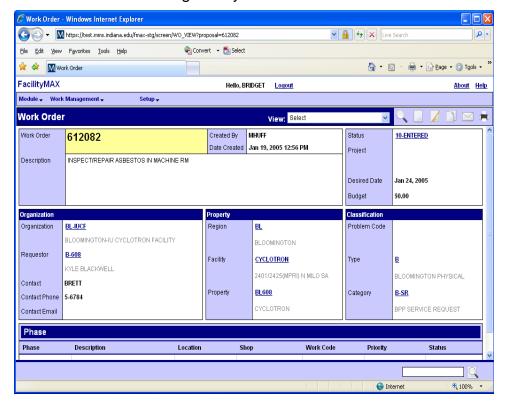
By clicking the 40-W.I.P. the status will change in the red box. When you are finished updating, click on the green done flag icon.



By clicking on the green done flag you are now back to the main work order page. You MUST click on the save icon to save the changes you have made.

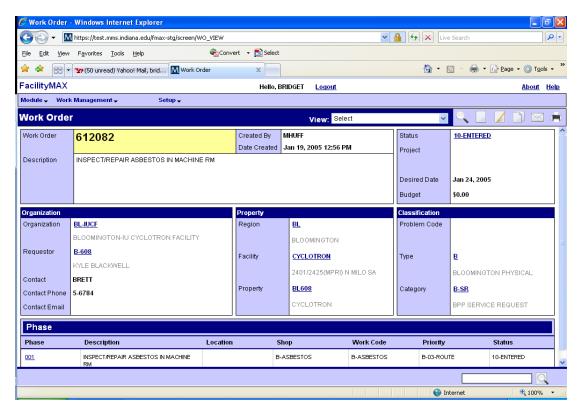


Notice that the red boxes go away once the work order is saved.

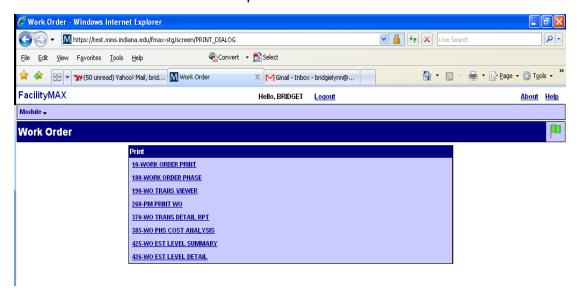


## **Printing**

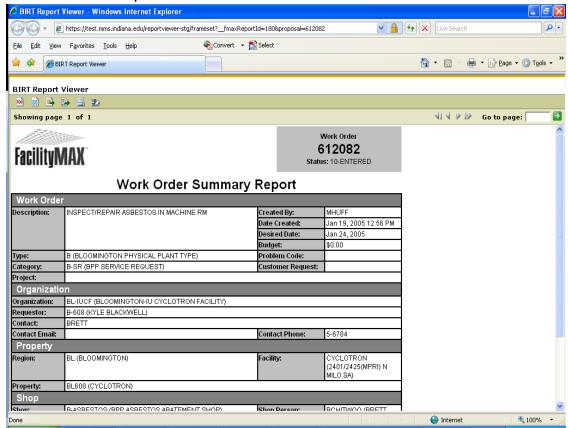
Let's take a look at one of these work orders so that you an see how to print it out. Lets look at 612082. This is one of the New Asbestos orders that we searched for.



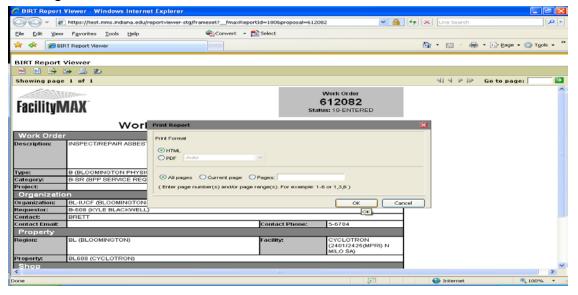
You will need to click on the black and white printer icon in the upper right corner of the work order screen. You will see a Print menu on your screen. This gives you the option to Print the work order, print the phase, print the work order transaction viewer, a PM or one of the available work order reports. In this case we will click on the 180-work order phase.



You will see a Work Order Summary Report and this is what will print out. Once you see the Work Order Summary Report, click on the small printer icon under the words BIRT Report Viewer.



You will now see the Print Report box. The HTML and All Pages should have a green dot beside them. Click on Ok.



You will see a second print box. This one should have your local printer highlighted. Click on the print button at the bottom of the page.

