Lab guide

IBM Maximo Application Suite Manage – Basic Navigation

Course code MAX4314G

January 2022 edition

Notices

© Copyright International Business Machines Corporation 2022.
This document may not be reproduced in whole or in part without the prior written permission of IBM.
US Government Users Restricted Rights - Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM Corp.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing, IBM Corporation, North Castle Drive, MD-NC119, Armonk, NY 10504-1785, US

INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some jurisdictions do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM websites are provided for convenience only and do not in any manner serve as an endorsement of those websites. The materials at those websites are not part of the materials for this IBM product and use of those websites is at your own risk.

IBM may use or distribute any of the information you provide in any way it believes appropriate without incurring any obligation to you.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to actual people or business enterprises is entirely coincidental.

Trademarks

IBM, the IBM logo, and ibm.com are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the web at “Copyright and trademark information” at www.ibm.com/legal/copytrade.shtml.

Adobe, the Adobe logo, PostScript, and the PostScript logo are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States, and/or other countries.

Java and all Java-based trademarks and logos are trademarks or registered trademarks of Oracle and/or its affiliates.

The registered trademark Linux® is used pursuant to a sublicense from the Linux Foundation, the exclusive licensee of Linus Torvalds, owner of the mark on a world-wide basis.

Microsoft, Windows, Windows NT, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

UNIX is a registered trademark of The Open Group in the United States and other countries.

VMware, the VMware logo, VMware Cloud Foundation, VMware Cloud Foundation Service, VMware vCenter Server, and VMware vSphere are registered trademarks or trademarks of VMware, Inc. or its subsidiaries in the United States and/or other jurisdictions.

Red Hat®, JBoss®, OpenShift®, Fedora®, Hibernate®, Ansible®, CloudForms®, RHCA®, RHCE®, RHCSA®, Ceph®, and Gluster® are trademarks or registered trademarks of Red Hat, Inc. or its subsidiaries in the United States and other countries.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

Contents

Table of Contents

Exercises ***4***

Exercise 1 IBM Maximo Application Suite Manage login **5**

Exercise 2 Explore Assets Application along with the Filters **7**

Exercise 2.1 Explore Filter fields 9

Exercise 2.2 Explore Wildcard search 12

Exercise 2.3 Explore Quick search options. 13

Exercise 2.4 Explore Error Reporting 15

Exercise 2.5 Explore Breadcrumb Navigation 16

Exercise 3 Explore Start Center and Manage home page. **18**

Exercise 3.1 Explore Edit Mode. 22

Exercise 3.2 Default Insert Site 24

Exercise 3.3 Explore User Profile in Maximo 26

Exercise 3.4 Explore Help in Maximo 31

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

Exercises

IBM Maximo Application Suite is an Enterprise Asset Management product with ability to manage, maintain, repair and operate the assets throughout its life cycle.

IBM Maximo Application Suite Manage allows you to manage and maintain high value assets by using AI and analytics to help in maximizing the yields of enterprise assets by minimizing downtime, optimizing maintenance, reducing the cost of materials and increasing the productivity of labour.

It helps in accurately recording transactions as well as work history and failure reporting that will allow Enterprises to make strategic decisions of repair or replace at the asset class level.

This lab is designed to give you an introduction to some of the basic features built into IBM Maximo Application Suite Manage. In this lab, you learn:

- Working with Start Centers.
- Navigating using the left navigation column.
- Searching records using various search options and filters.
- Managing Queries.
- UI error handling.
- Breadcrumb navigation.
- Edit mode.
- User Profiles.
- Help Menu options.

Important: The exercises are designed to run on both virtual lab format as well as live labs.

A virtual lab is an interactive simulation of the original virtual machines or containers. A virtual lab is not an actual virtual machine. Therefore, your interaction opportunities are restricted to the exercise steps with some minor variance. You use this lab guide, which walks you through usage and responses for the components that are taught. You can run the virtual lab multiple times without restriction.

With the live labs, if the exercises are not completed correctly and in the order prescribed, this may cause issues in subsequent lab exercise.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

Exercise 1 IBM Maximo Application Suite Manage login

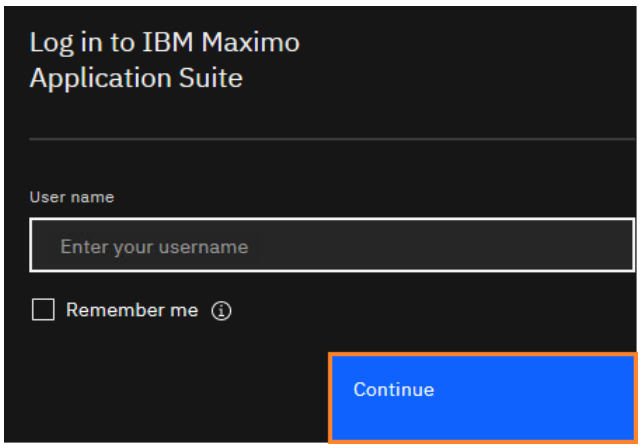
In this exercise, you login to IBM Maximo Application Suite Manage (IBM MAS Manage). This prerequisite enables you to complete the other exercises in the lab.

1. To access the Maximo Application Suite, in the Virtual lab environment, double-click the **Firefox** icon on the desktop. If you are using a Live lab, enter the URL provided to you in the browser.

   The application Log in page opens.

2. Log in to the IBM Maximo Application Suite:

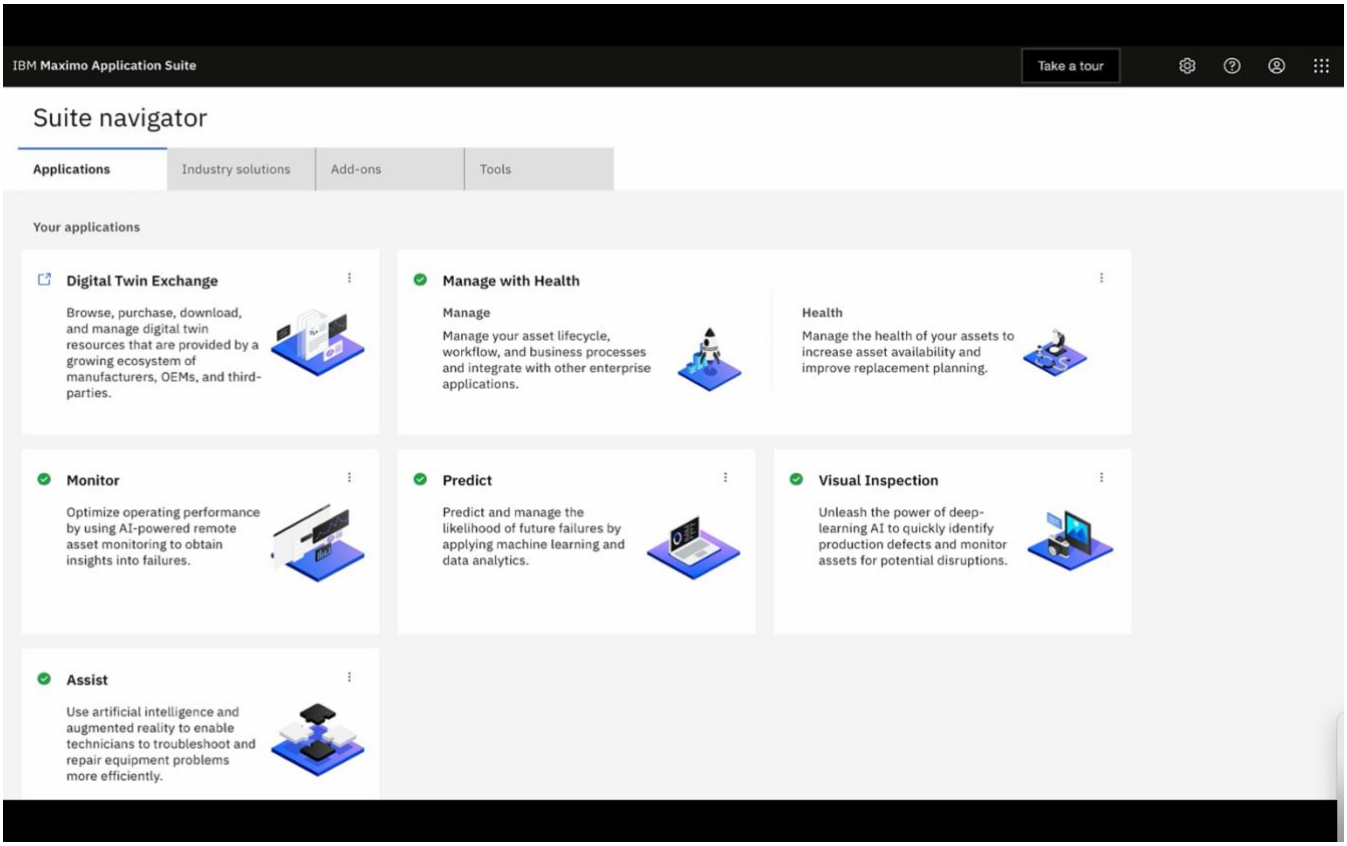
   a. Click on the User name textbox, enter `maxadmin` and press **Enter**.



The Suite Navigator page opens.

Note: Here the user can see all the applications that one has access to.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



3. To access Manage application:
   a. Click the **Manage** section from the **Suite navigator**.

   The MAS Manage landing page opens up with a list of Start centers .

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

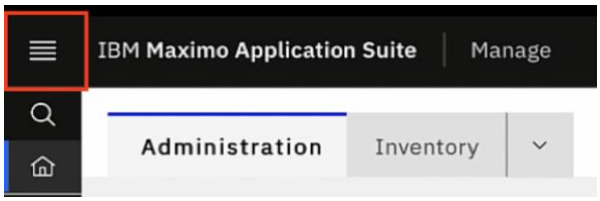
Exercise 2 Explore Assets Application along with the Filters

Now that you have logged in to the MAS Manage, it is time to explore the Assets application along with the filters and queries.

In this exercise you:

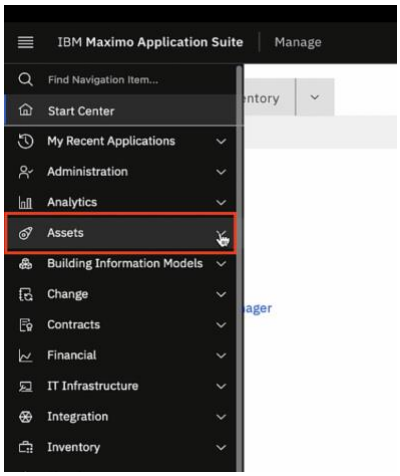
- Learn about Assets application page.
- Use Filters with String search, search by Value, wildcard search and Quick search options.
- Learn Error handling in UI
- Learn about Where Clause, save a new Query, use it and manage the Query.

1. Navigate to Assets application:
   a. Click the Open menu button.



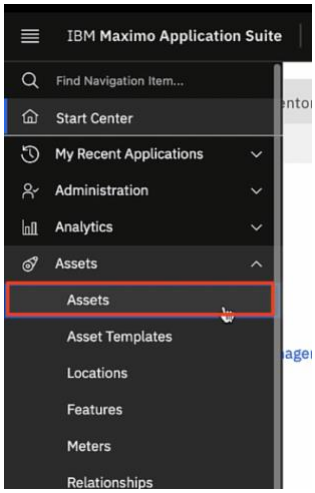
   The left menu column expands.

   b. Click on **Assets** menu item.

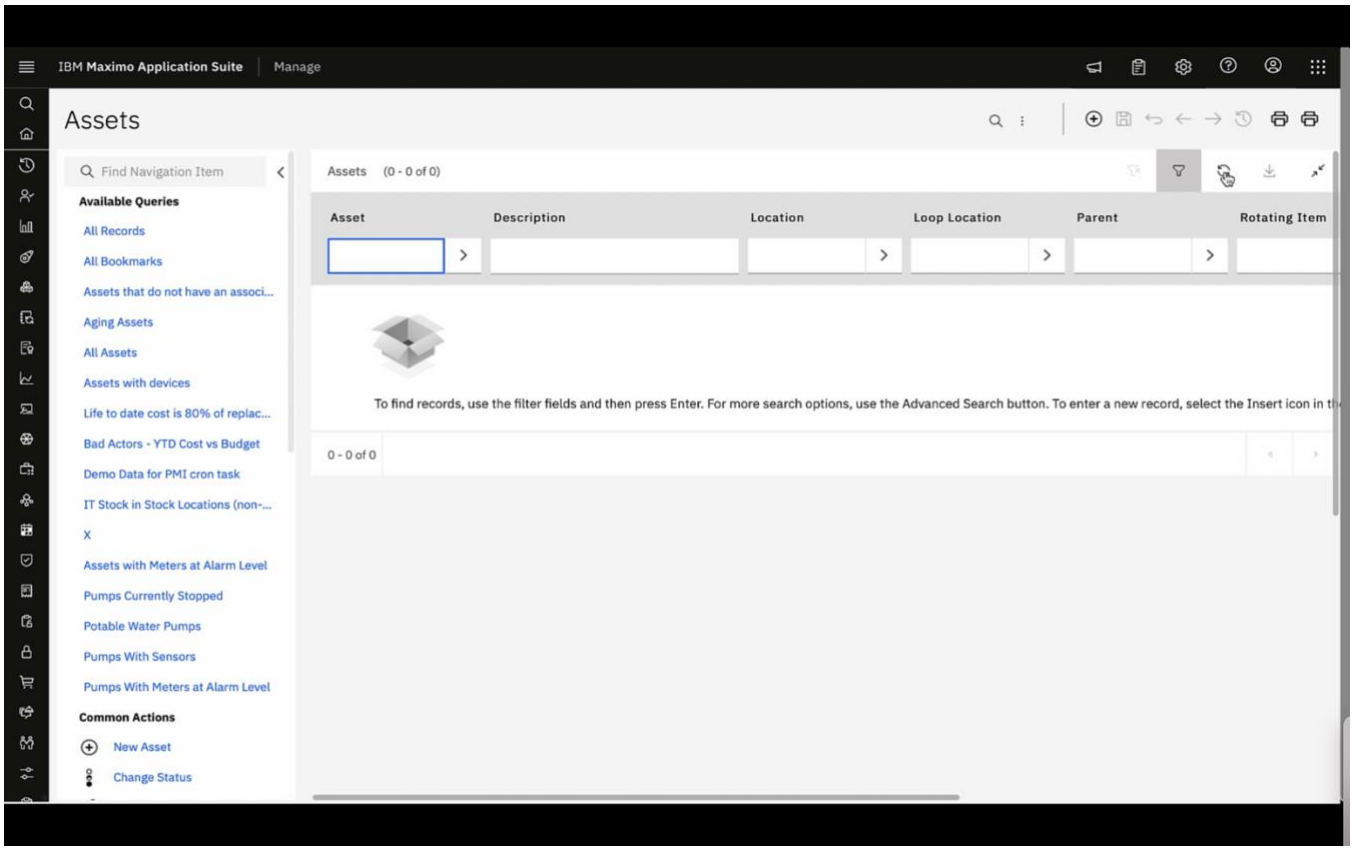


   c. From the list select **Assets**.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



Assets application page opens.

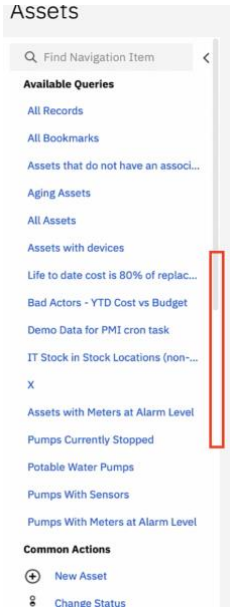


2. Scroll the left navigation column:
   You can see a section with a list of **Available Queries** for Assets application.

Note: Available Queries are queries either created by the logged in user or another user in order to make filtering of records convenient with some commonly used queries.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

a. Click the scroll bar to scroll down.



You will see a section with a set of **Common Actions** that can be performed in the Assets application.

b. Scroll down further.

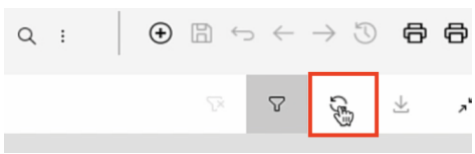
You can see a section with a set of **More Actions** that can be performed in the Assets application

Note: These actions are application specific. When we switch the application from Assets to another application, the corresponding actions also change.

c. Scroll Up

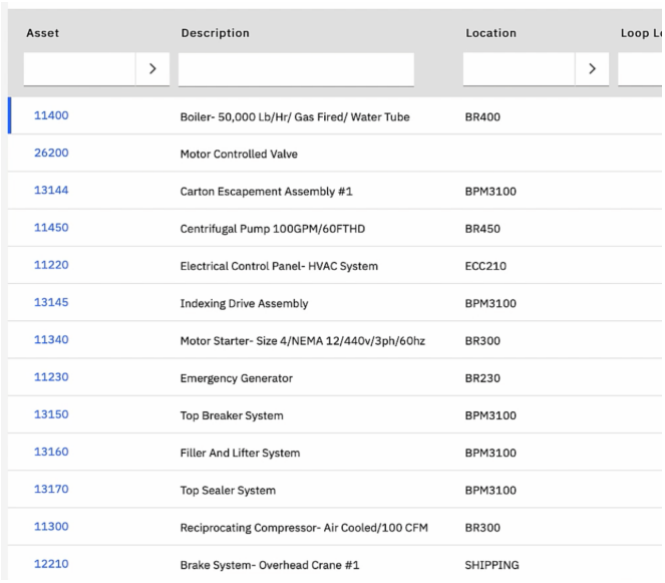
Exercise 2.1 Explore Filter fields

1. Perform a String search in the Assets list page:
   a. Click the refresh button to load result of the default query.



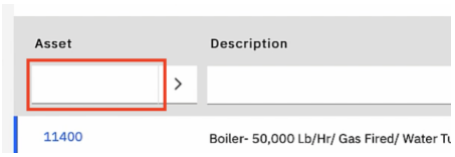
You can see a list Assets being displayed.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



Asset	Description	Location	Loop L
11400	Boiler- 50,000 Lb/Hr/ Gas Fired/ Water Tube	BR400	
26200	Motor Controlled Valve		
13144	Carton Escapement Assembly #1	BPM3100	
11450	Centrifugal Pump 100GPM/60FTHD	BR450	
11220	Electrical Control Panel- HVAC System	ECC210	
13145	Indexing Drive Assembly	BPM3100	
11340	Motor Starter- Size 4/NEMA 12/440v/3ph/60hz	BR300	
11230	Emergency Generator	BR230	
13150	Top Breaker System	BPM3100	
13160	Filler And Lifter System	BPM3100	
13170	Top Sealer System	BPM3100	
11300	Reciprocating Compressor- Air Cooled/100 CFM	BR300	
12210	Brake System- Overhead Crane #1	SHIPPING	

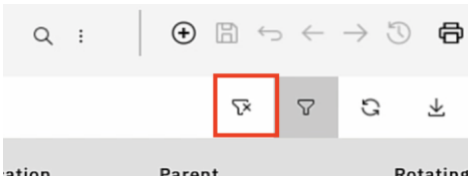
b. Click on the **Asset** Text box field, type "**131**" and press **Enter**.



Note: You can see a **string search** has happened on the Asset column and a list of assets are displayed that are filtered with the whole or part of the asset Id having **131** as string.

c. Scroll the page to view the filtered list of assets.

d. Click the Clear Filter Fields button.



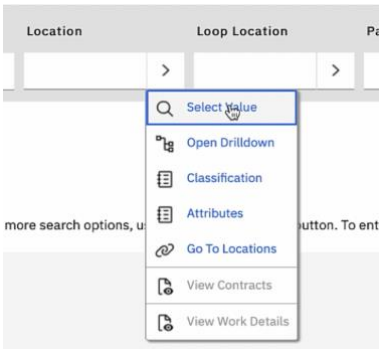
This will end up resetting the filter fields.

2. Explore **Select Value** option in filter fields:

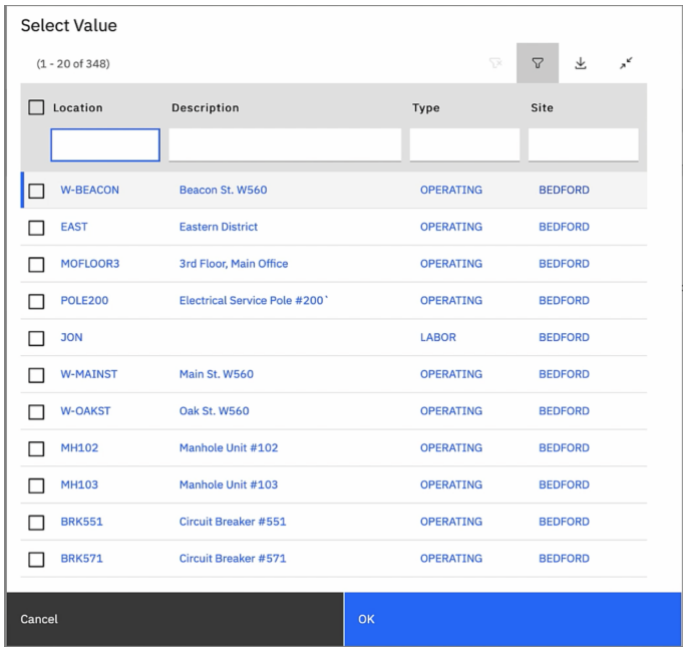
a. Click on the **Detail menu** next to **Location** filter field.

b. From the list click on the option **Select Value**.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



Note: A new window opens with a list of **Locations.**



c. Now type "**BPM**" and press **Enter**.

The filter narrows down to two records.

d. Here click on the record "**BPM3100**".

You will see that this value gets selected and loaded in the Location filter field.

e. Select the **Location** text box and press **Enter**.

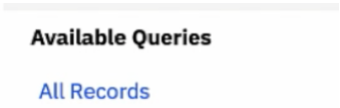
f. Scroll the page to view all the records with location as "**BPM3100**".

g. Now clear the filter fields by clicking on button.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

Exercise 2.2 Explore Wildcard search

1. Explore **Wildcard search** in filter fields:
   a. Click on **All Records** from the **Available Queries** section on the left.



   All the records get listed
   b. Select **Description** textbox and type "**Fire**" and press **Enter**.
   c. Click on the **Parent** textbox and type "**~null~**" and press **Enter**.
   d. Click on the **Asset** filter textbox and type **"<11000**" and press **Enter**.
   e. Click on the **Location** filter textbox and type "**OFF_ _ _**" and press **Enter**.

Note: You will see records with the following filter on the Assets list page applied.
Assets with **Description** containing string "**Fire**", **Parent** value as **null**, **Asset** Id with value **less than 11000** and **Location** having first three characters as **OFF** and the last three as any characters.

   f. Now clear the filter fields by clicking on button.

Some of the wildcard characters and their usage is given below.

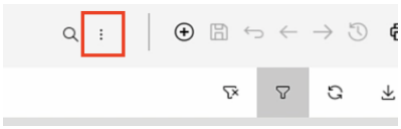
Wildcards and their usage

%	——————>	Substitutes for a string of characters while searching for a partial value in the field.
_ or ?	——————>	Substitutes for a single character while searching for a partial value in the field.
<	——————>	Find records with value less than the value in the field. (Applicable to positive Integers)
<=	——————>	Find records with value less than or equal to the value in the field. (Applicable to positive Integers)
>	——————>	Find records with value greater than the value in the field. (Applicable to positive Integers)
>=	——————>	Find records with value greater than or equal to the value in the field. (Applicable to positive Integers)
=	——————>	Find records with the exact character string in the field.
!=	——————>	Find all values except for the value that is in the field. (Not applicable to fields with Date values)
~null~	——————>	Find records that do not include a value in a specific field.

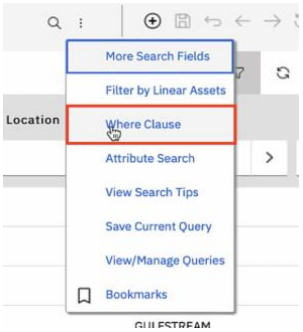
Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

Exercise 2.3 Explore Quick search options.

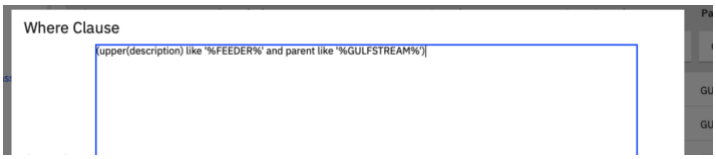
1. Explore **Where Clause** in Assets:
   a. Click on **Description** textbox and type "**Feeder**" and press **Enter**.
   b. Click on **Parent** textbox and type "**GULFSTREAM**" and press **Enter**.
   c. Click on the **Quick Search** icon on the top right corner of the page to display a list of options for quick search.



   d. Now select **Where Clause** menu item from the list.



A pop up window opens containing the search query that is being executed when we run this filter from the list page.

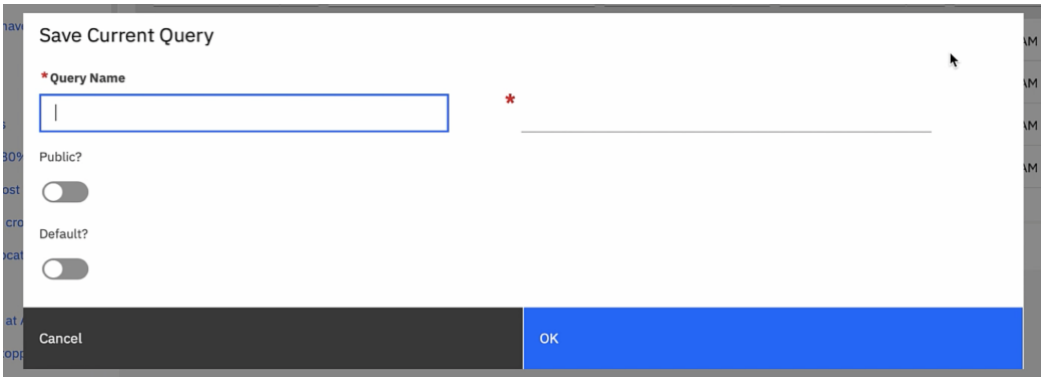


   e. Now click on **Cancel**.

2. Explore **Save Current Query** option in Quick search :
   a. Click on the **Quick Search** icon on the top right corner of the page.
   b. Click on **Save Current Query** menu item.

   A pop up window opens with options to save the current query.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



c. Click on the **Query Name** text box, type "**Feeder System with GULFSTREAM as Parent**" and press Enter.

d. Click on the **Description** text box, type "**Feeder System with GULFSTREAM as Parent**" and press Enter.

e. Click on the checkbox of '**Public?**' to make the query to be public.

f. Click **OK** to save the query.

Observe, that this new query appears in the list of **Available Queries**.

g. Click on **All Records** from the **Available Queries**.

h. Now click on the new query that was just created.

You can see, when the new query runs, it lists the expected set of records.

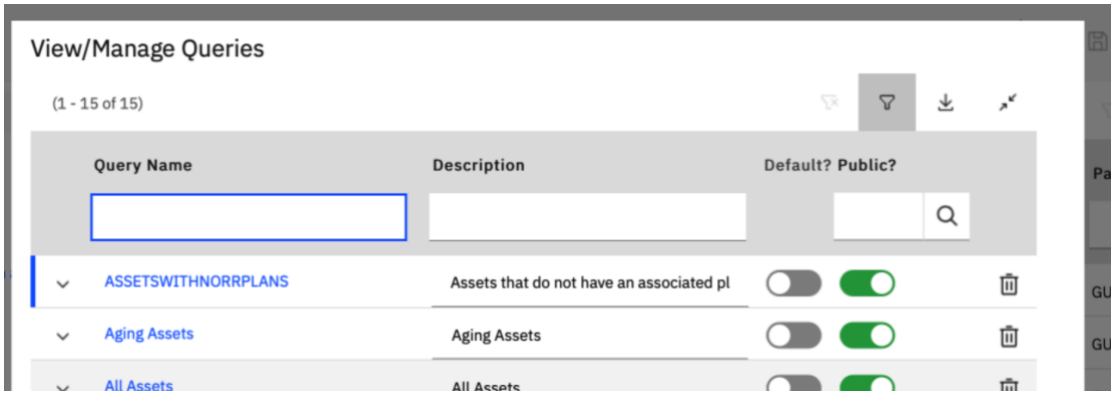
3. Explore **View/Manage Queries** option in Quick search :

a. Click on the **Quick Search** icon on the top right corner of the page.

b. Click on **View/Manage Queries** menu item.

A popup window opens with list of all the queries.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



c. Type "**Feeder**" and press **Enter**.

d. The Query we created earlier is seen.

Here we can choose to Edit the settings of the query or Delete the query.

e. Click on the **Mark Row for Delete** icon corresponding to the query.

f. Click **OK**.

This actions deletes the query and this query will be removed from the Available Queries list.

Exercise 2.4 Explore Error Reporting

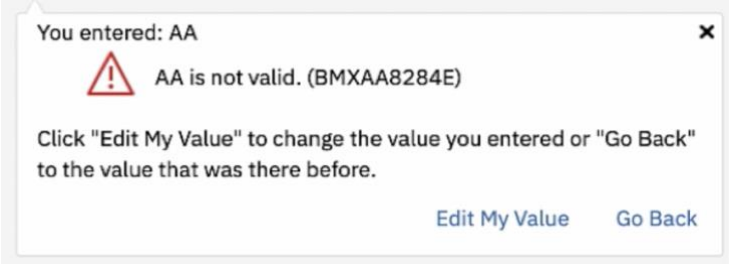
1. Explore **Error reporting** in Maximo :
   a. Click on the **All Records** query.
   b. Select the Asset text box, type **13110** and press Enter.
   c. From the list click on the Asset with Id **13110**.

   Asset details page opens up for the asset selected.

   d. Here select the "**Type**" text box and enter "**AA**" and press the Tab key.

   One can see an error icon in the Type text box.

   e. Click on the error icon to see the details of the error.



Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

Note: Since Type field takes values from an enumerated list, any other value apart from the list is treated as an error.
Also, one needs to note that this error occurs dynamically, which means, the user does not have to wait to save the asset to see this error, it prompts the user as and when they occur.

f. To explore this further, click on the option "**Edit My Value**".

g. You can see that the text ox which was blank with an error icon reloads the previous value "**AA**", allowing us to edit it.

h. Now append another character "**C**" to the existing value "**AA**", which makes it "**AAC**" and press the Tab key.

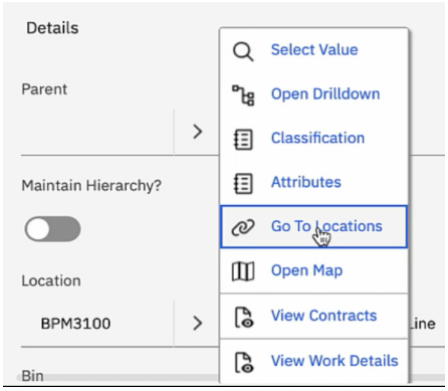
i. The error icon occurs again.

j. Click on the error icon and this time select the option "**Go Back**".

k. You will observe that the text box is empty which is the previous accepted value for this field.

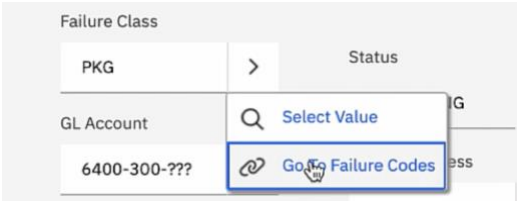
Exercise 2.5 Explore Breadcrumb Navigation

1. Explore **Bread crumb Navigation** in Maximo :
   a. Staying on the same page, scroll down using the scroll bar.
   b. Click the Detail Menu for the field **Location**.
   c. From the list of menu items select "**Go To Locations**".



   d. This will take you to the **Locations** application page.
   e. Here select the **Detail** Menu for the field **Failure Class**.

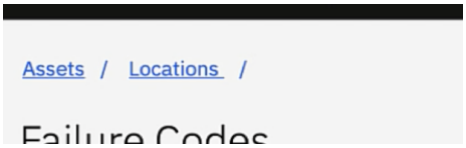
Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



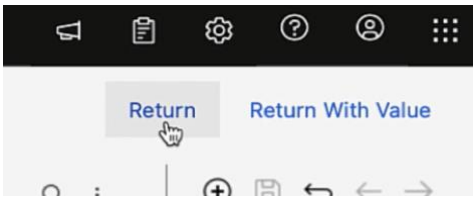
f. From the list of menu items select "**Go To Failure Codes**"

g. This will take you to **Failure Codes** application page.

Observe, on the left top corner of a page, breadcrumb path is shown thru which we navigated.



Also on the right top corner of the page one can see the **Return** options.



h. Click on the **Return** button.

The user is navigated back to **Locations** application page.

i. Now click on the **Return** button again.

The user is navigated back to **Assets** application page. It has retraced the path.

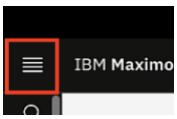
Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

Exercise 3 Explore Start Center and Manage home page.

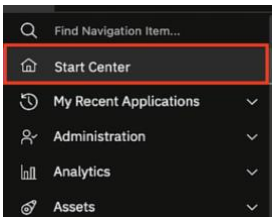
In this exercise you:

- Learn about Display Settings for Start Centers
- Learn about changing Content / Layout of a Start Center.
- Learn about Edit mode in Maximo.
- Learn about Default Insert Site in Maximo.
- Learn about User Profile in Maximo.
- Learn about Help Menu in Maximo.

1. To access the Start center home page:
   a. Click on the **Open menu** button on the top left corner of the page.



   b. From the expanded left column, click on the menu item "**Start Center**".



   c. If a dialog popup appears asking to save your changes. Select **No**.

   This will take you to the MAS Manage Home Page.

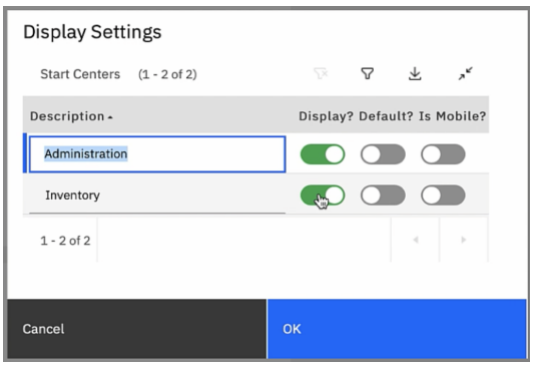
   Here you will see two start centers displayed. **Administration** and **Inventory**.

2. Explore **Display Settings**:
   a. Click on the **Display Settings** button from the list of options on the top right corner.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

Here we can choose how the Start Centers are displayed to us. Let us turn off the display for Inventory Start Center.

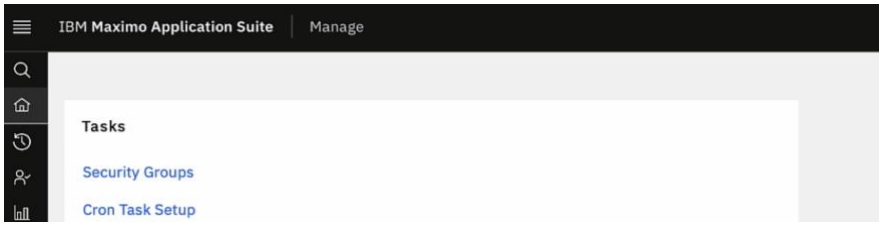
b. Click on the **Display** button corresponding to **Inventory**.



The button state toggles.

c. Now click **OK**.

Observe that the Inventory Tab that was seen earlier is missing from the view.



d. Now click on the **Display settings** button again.

e. And toggle the **Display** button corresponding to **Inventory** such that the option is now enabled.

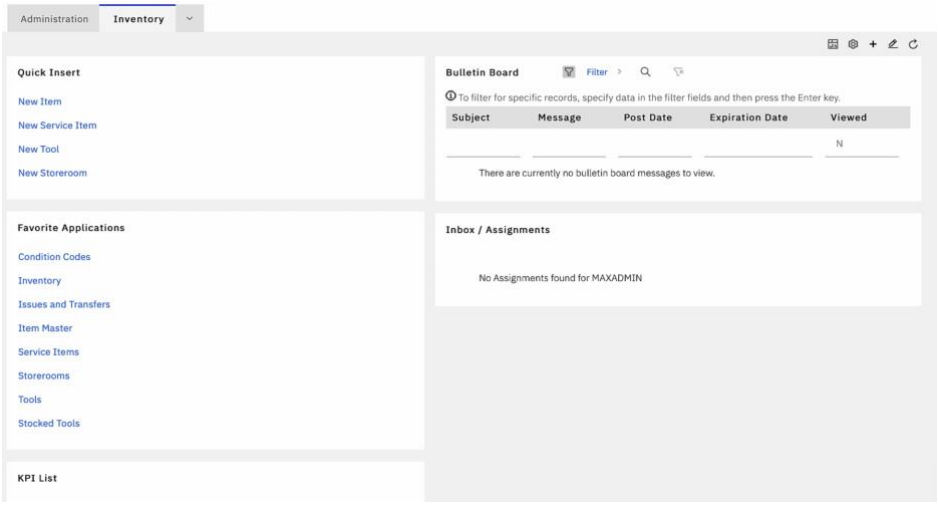
f. Click **OK**.

g. The **Inventory** tab reappears.

Note: Similarly one can modify the setting for 'Default?' and 'Is Mobile?' for all the start centers. By enabling the option 'Default?', the respective Start Center appears as default on login.

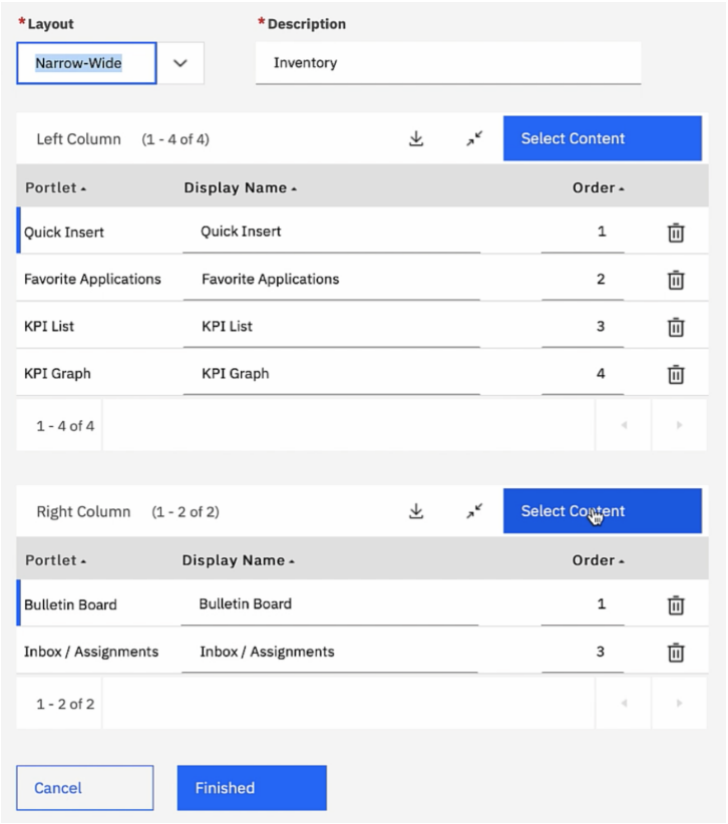
3. Explore **Change Content/Layout** :
   a. Click on the **Inventory** tab.
   b. Here you see two columns one **narrow** and the other **wide** containing a set of portlets. One can modify this setting, for example, what portlets to show, and the order.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



c. Click on the **Change Content/Layout** button from the list of options on the top right corner.

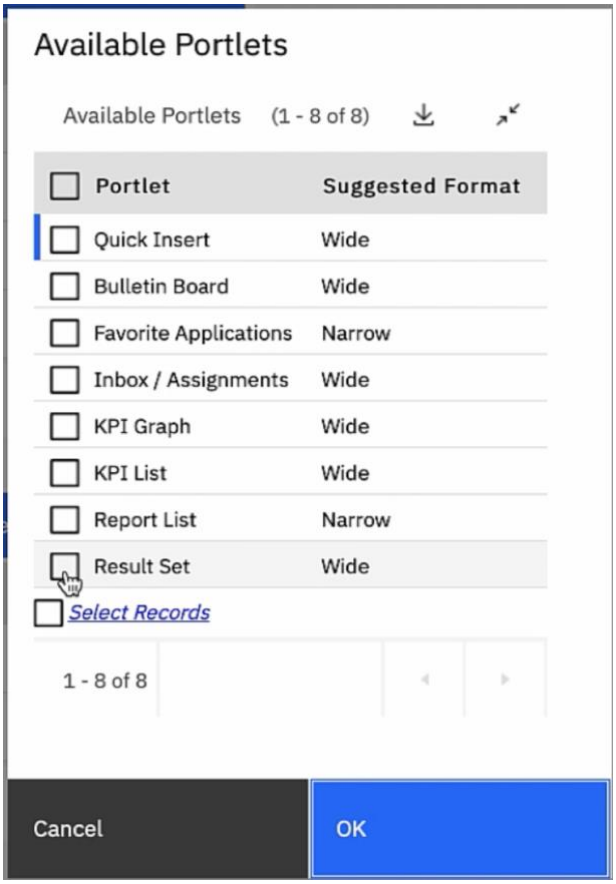
You can see a list of portlets, the column(left or right) and order of display for inventory start center. Also, the option to select content for each column and an option to mark the specific row for deletion can be seen.



d. Click on the **Select Content** button for the **Right Column**.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

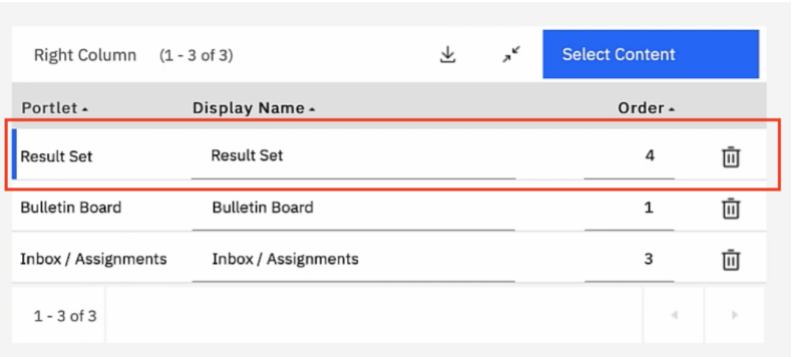
A list of **Available Portlets** are seen that can be added to the Inventory Start Center.



e. From the list, select the checkbox for the item **Result Set**.

f. Click **OK**.

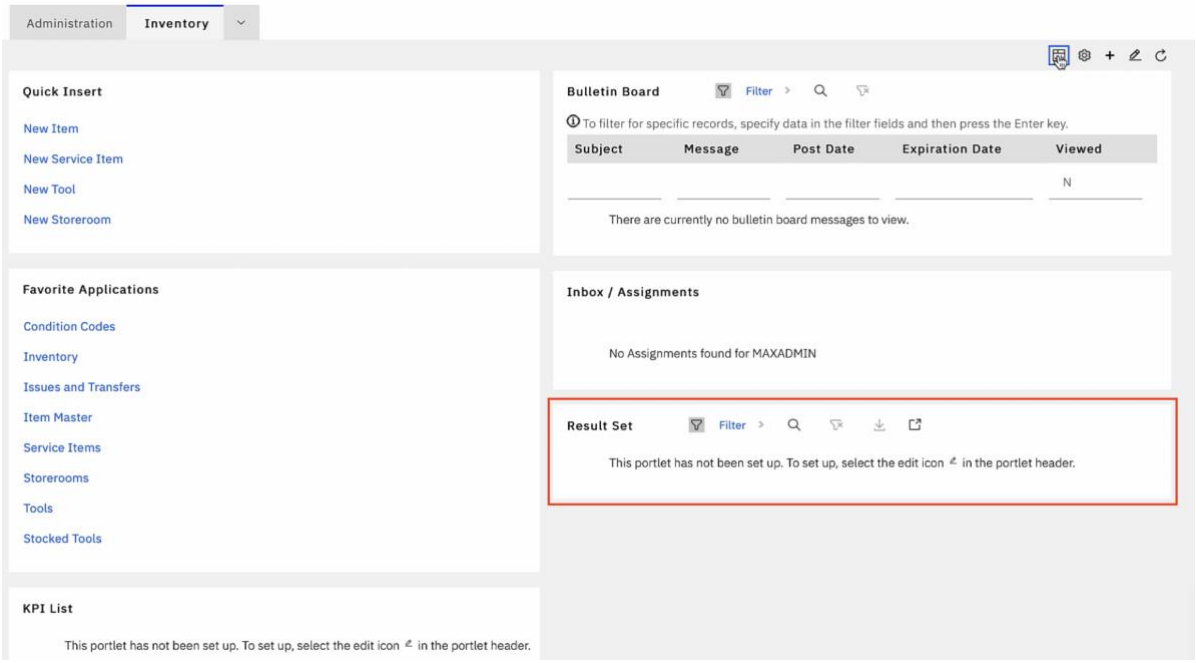
You can observe a new row is added to the right column list with a default priority 4(the last of priority in the list). We can modify them if we need to.



g. Scroll down and click **Finished**.

You can see a new portlet is added to the **Right Column** of the **Inventory** tab. However this section is empty as this portlet is not setup.

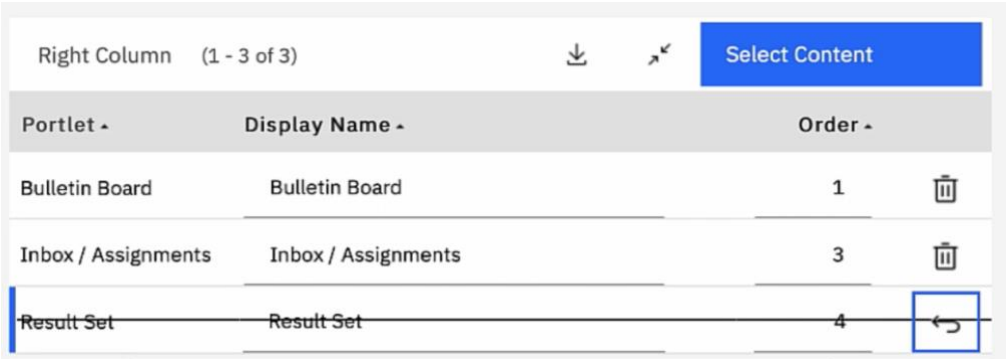
Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



h. Click on **Change Content/Layout** again.

i. Click on **Mark row for Delete** for the recently added content (Result Set).

The **Result Set** row is marked for Delete as shown below.



j. Click on **Finished**.

Now the result Set portlet is not seen anymore on the Inventory tab.

Exercise 3.1 Explore Edit Mode.

In Maximo, application can be enabled for Edit Mode. This temporarily locks the record whilst it is being edited. This stops other users from changing the same record and creating a conflict.

And this can be enabled from Application Designer application.

Let us look at it for **ASSET** application.

1. Navigate to **Application Designer**:

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

a. Click the **Open Menu** button.

b. Scroll down and click on **System Configuration**.

c. Click on **Platform Configuration.**

d. Click on **Application Designer**.

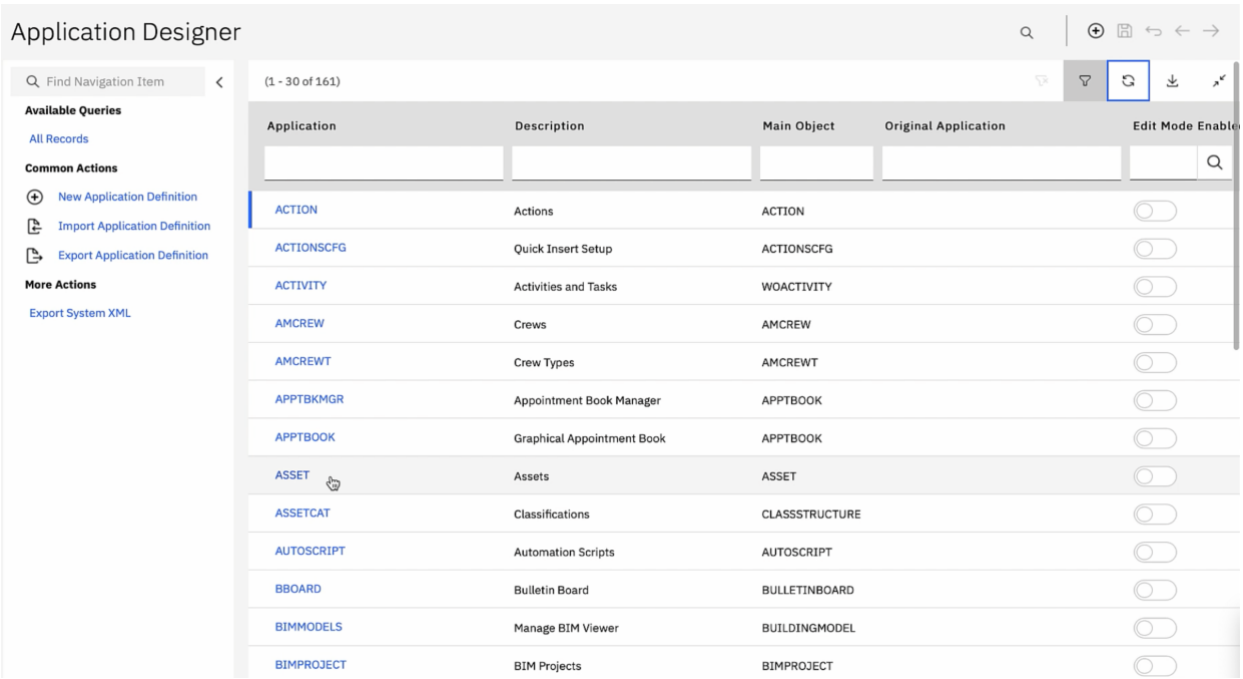
Application Designer application opens.

2. Explore **Edit mode** for Assets application:

   a. Click on the Refresh button.

   List of applications get loaded.

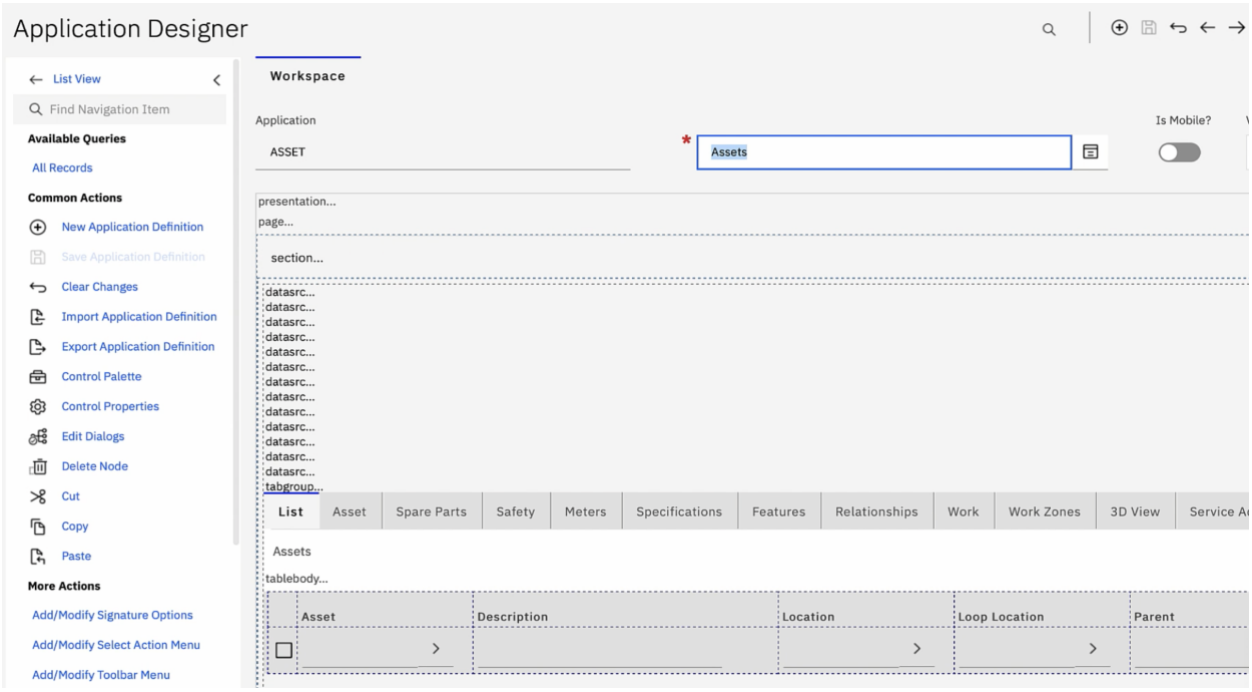
   Observe the column **Edit Mode Enabled?** on the right side of the page. And this flag is disabled for Assets application.



b. Click on **Asset** Application from the list.

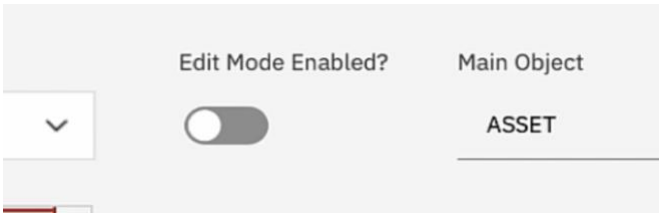
Workspace for Asset application opens.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



c. Scroll right of the page.

Here you will see a button called '**Edit mode Enabled?**'. When we enable the button here. Edit mode gets enabled for **ASSET** application.

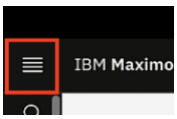


Exercise 3.2 Default Insert Site

Some applications are configured with a default site, which in our case is BEDFORD. So when we are creating a new asset, this site is selected by default for the asset.

Let us look at **Default Insert Site**.

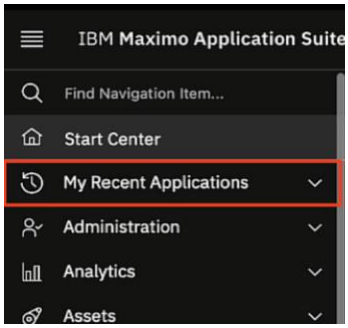
1. My recent Applications:
   a. Click the **Open Menu** button.



   b. Click on **Start Center**.
   c. Click the **Open Menu** button again.

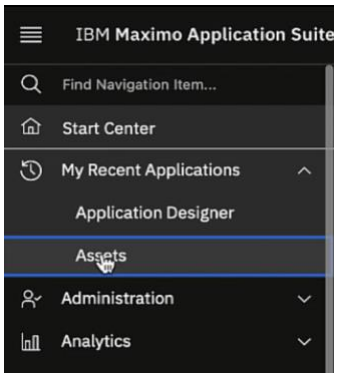
Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

d. Click on **My Recent Applications**.



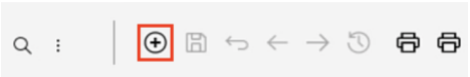
Note: **My Recent Applications** is a very handy feature. This will list the recently navigated applications for ease of future navigation.

2. Asset creation with default insert site:
   a. Click the **Assets** menu item.

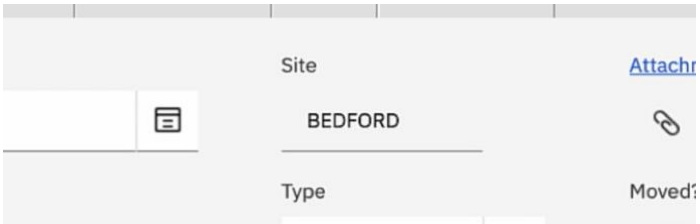


Asset application loads up.

b. Here click on **New Asset** button from the options on the top right corner.



c. Observe that the **Site** field is already populated and it cannot be changed.



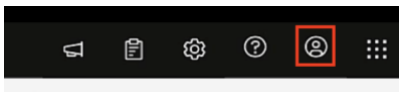
In our case it is set to **BEDFORD**.
We will look at the defaults in the next section.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

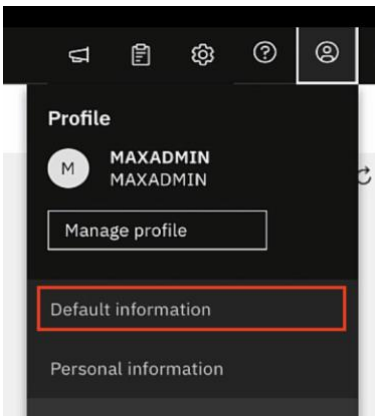
Exercise 3.3 Explore User Profile in Maximo

Let us look at User Profile in Maximo.

1. Default Information – Default Insert Site:
   a. Click the **Open Menu** button.
   b. Click on **Start Center**.
   c. Click the **User Profile** button on the right top corner.



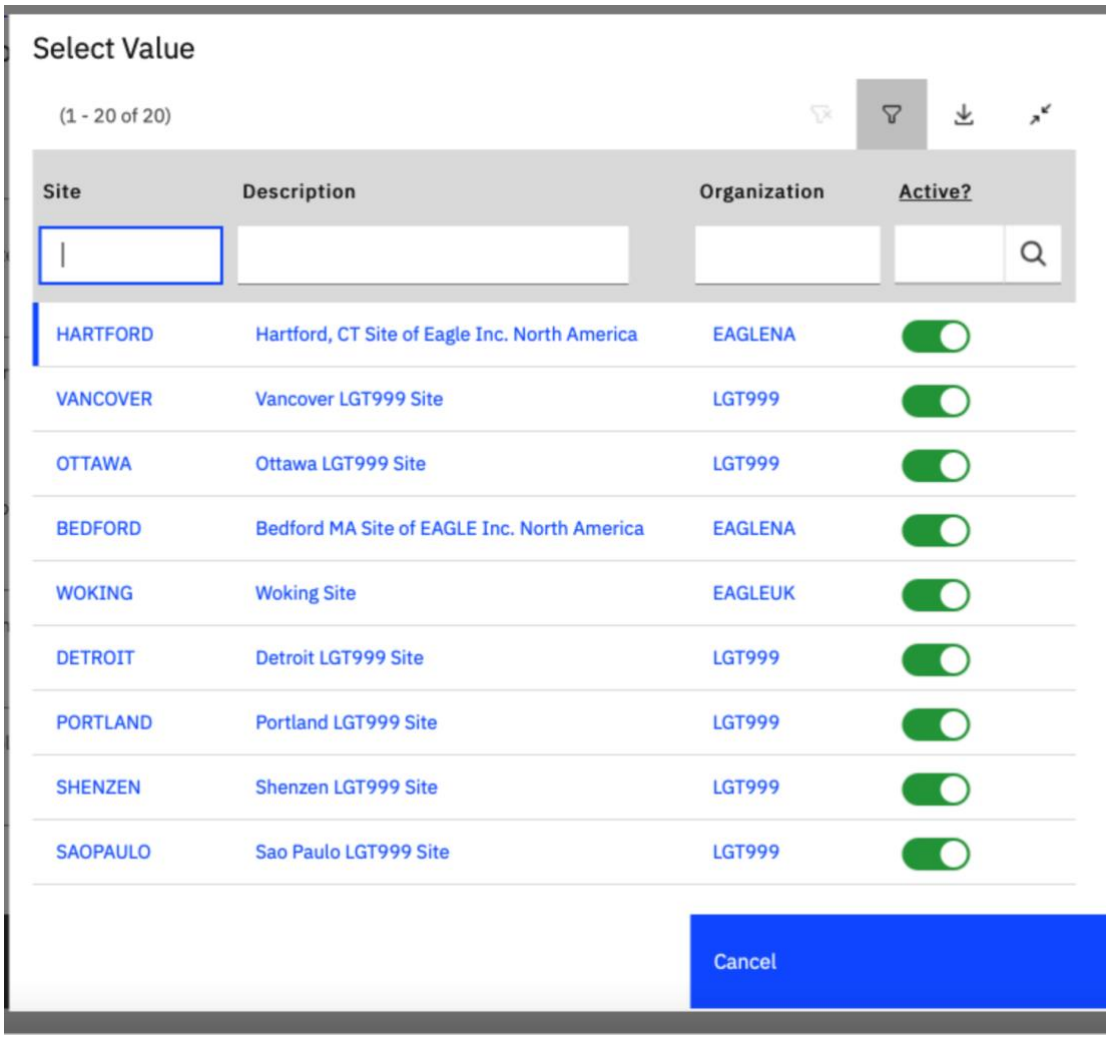
   d. Click on **Default information**.



A pop up window opens with various default options. Here you will also see an option to edit Default Insert Site.

   e. Click on **Select Value** button corresponding to Default Insert Site.
   f. A window with list of sites open where one can set the Default Insert Site in Maximo.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



g. Click **Cancel**.

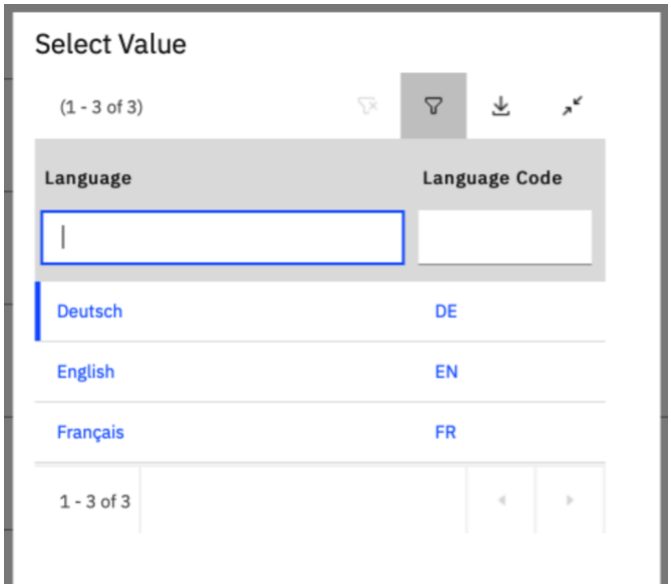
2. Default Information – Default **Language**:
   a. Scroll down on the Default information page.

   Here you will see an option to set default **Language**.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

b. Click on **Select Value** button corresponding to **Language** option.

You can see a list of languages that can be set as default in Maximo.

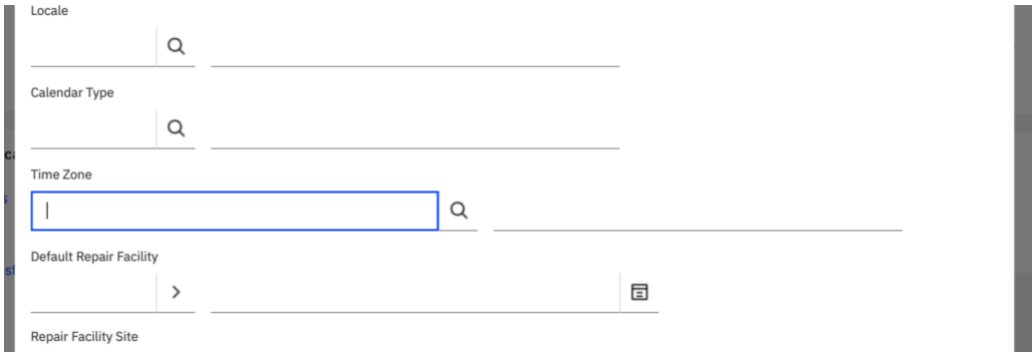


c. Click **Cancel**.

3. Default Information – Default **Time Zone**:

a. Further down the Default information page you can see a **Time Zone** option.

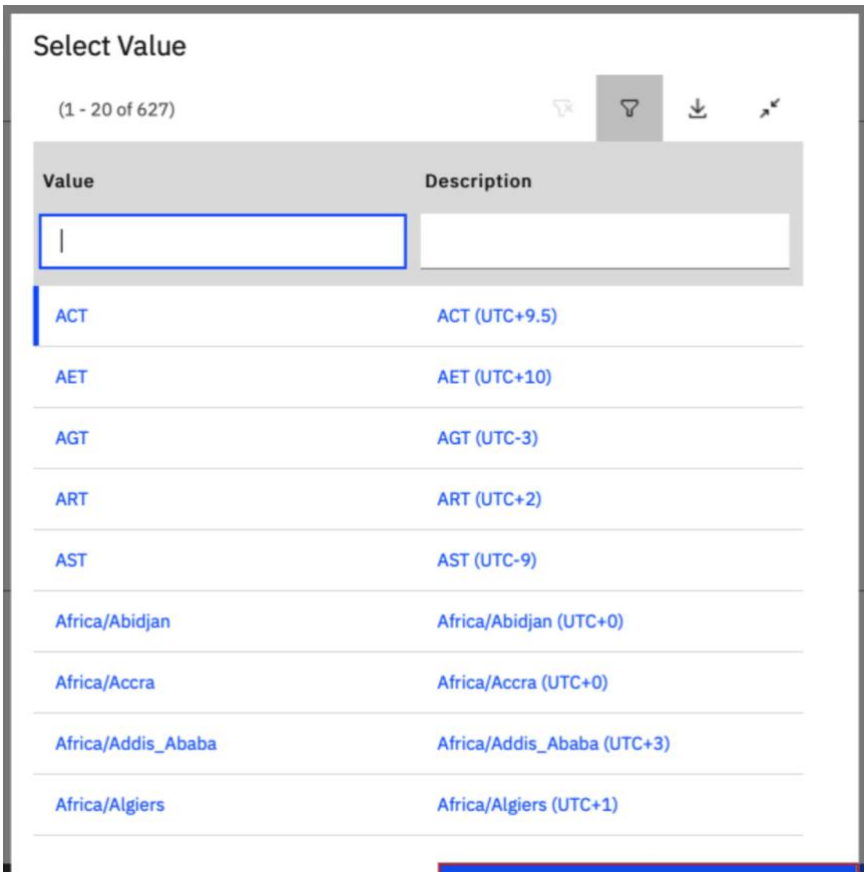
Here is where one can set a default Time Zone in Maximo.



b. Click on the Select Value option corresponding to Time Zone.

One can see a list of Time Zones that can be selected as default in Maximo.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



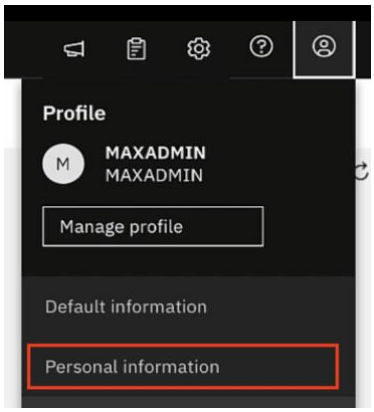
Note: Dates and times in Maximo are stored in UTC and converted to show in the user's local time zone.

c. Click **Cancel**.

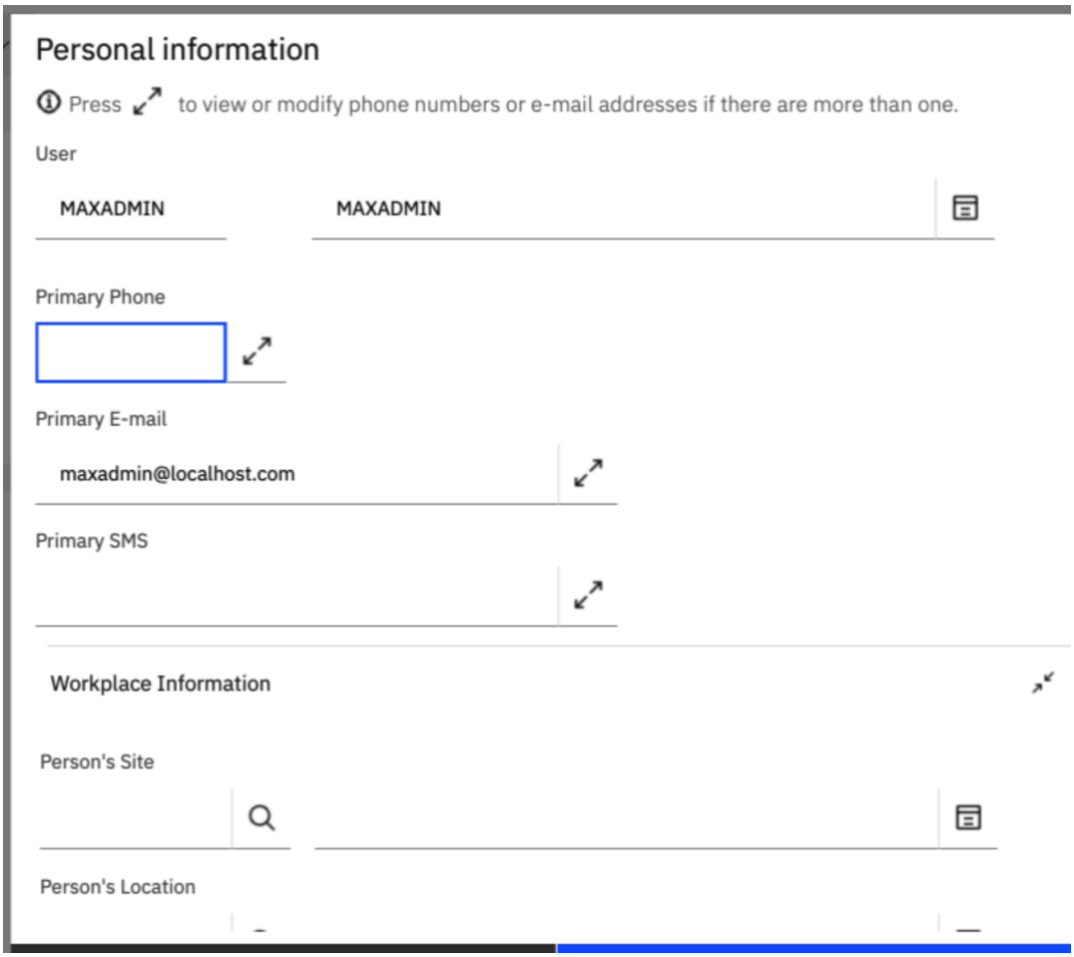
d. Click **Cancel** on the **Default Information** page.

4. User Profile – **Personal Information**:
   a. Click the **User Profile** button on the right top corner.
   b. Click on **Personal Information**.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



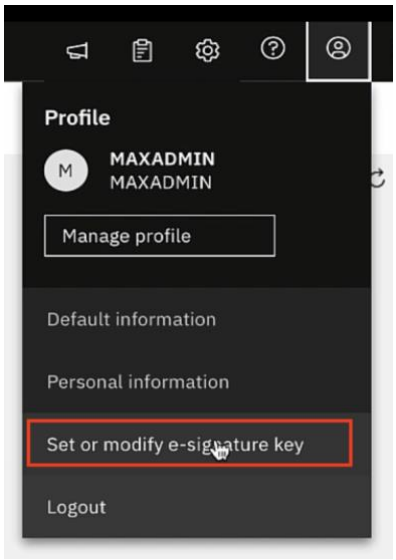
Here one can view or edit any of the Personal Information of the logged in User.



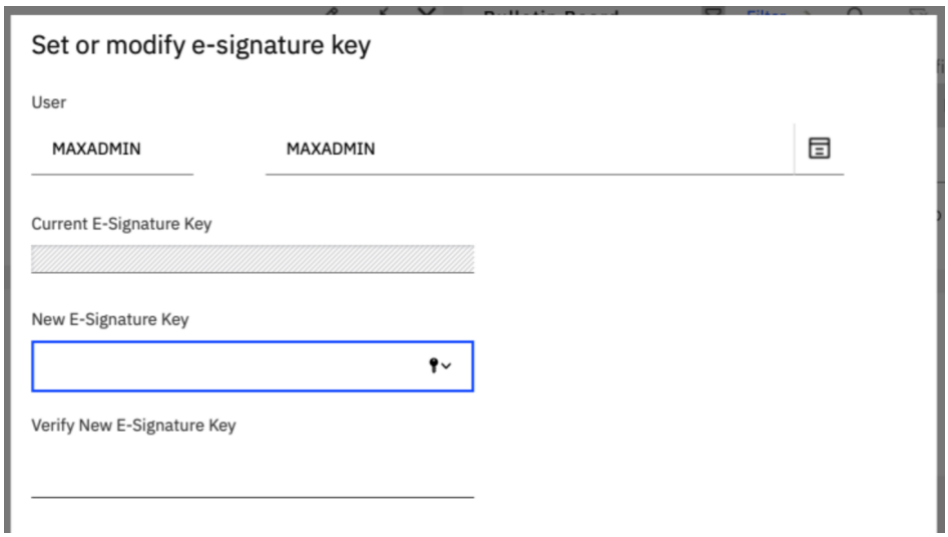
c. Scroll down to look at all the fields available.
d. Click on **Cancel**.

5. User Profile – **e Signature Key**:
   a. Click on User Profile Option on the top right corner.
   b. Select **Set or modify e-signature key**.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.



Here one can create a new e-signature key or modify an existing one.



Note: **e-Signature Keys** is used for applications requiring additional user validation for specific data changes.

c. Click on **Cancel**.

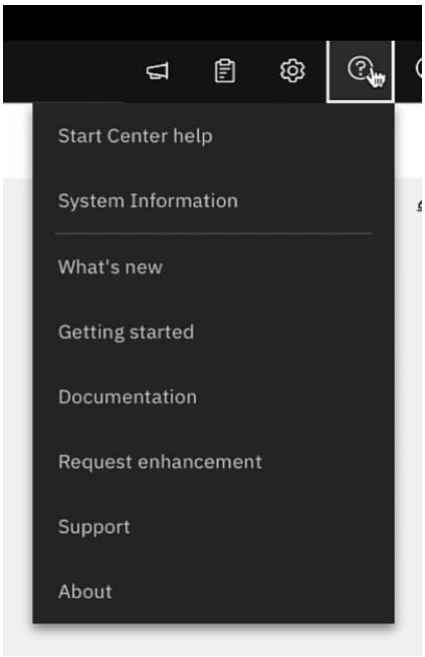
Exercise 3.4 Explore Help in Maximo

Let us look at Help in Maximo.

1. Help:
   a. Click the Help button on top right corner of the page.

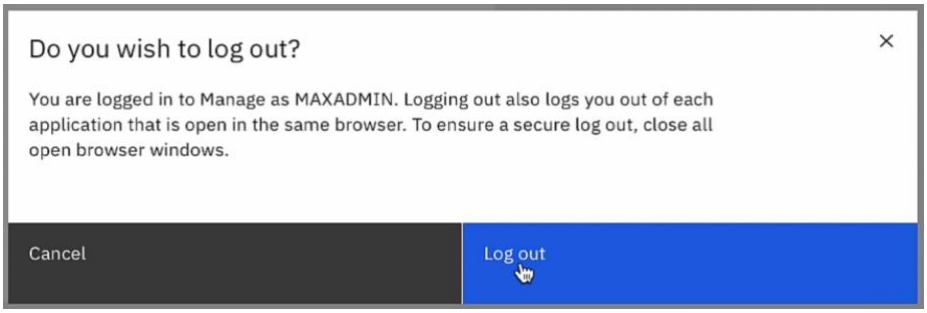
Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

b. Here one can see various Help options available in Maximo.



c. Click on the Help button again.

2. Logout:
   a. Click the User Profile button.
   b. Click the **Logout** option.
   c. Click **Logout** from the confirmation popup.



Congratulations, you completed this lab and are now able to:

- Understand navigating in Maximo.
- Apply the filter options and wildcards to search records in Maximo.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

- Create and manage search queries and understand the usage of Where clause in Maximo.
- Understand the basics of Start Center and ways to modify existing Start Center.
- Enable applications for Edit mode in Maximo.
- Understand features like My recent Applications and Breadcrumb navigation in Maximo.
- Understand UI error handling for users.
- Understand User Profile settings and Default information in Maximo including Default Insert Site.
- Understand e-signature keys and Help options in Maximo.

Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

© Copyright IBM Corp. 2022