

CREATING & MANAGING PERSONAL QUERIES

CREATE PERSONAL QUERY

1. Navigate to the screen in which you want to save a search. In this example, a personal query will be created for Work Orders
2. Click on the SEARCH Icon in the upper right hand corner of the screen

The screenshot shows the 'VIEW WORK ORDERS' screen. At the top, there are navigation menus for 'Module' (Work Management) and 'Setup' (VIEW WORK ORDERS). Below this is a header bar with 'Work Order' and a 'View: Select' dropdown. The main area is divided into several sections: 'Work Order' (with fields for Created By, Date Created, Status, Project, Desired Date, Budget), 'Organization' (with fields for Organization, Requestor, Contact, Contact Phone, Contact Email), 'Property' (with fields for Region, Facility, Property), and 'Classification' (with fields for Problem Code, Type, Category). At the bottom, there is a 'Phase' table with columns: Phase, Description, Location, Shop, Work Code, Priority, Status. A search icon is visible in the top right corner.


3. Click the ADD QUERY Icon with the green plus sign

The screenshot shows the 'VIEW WORK ORDERS' screen with the 'Add Query' interface. The top navigation is the same as the previous screenshot. The main area is now a query builder. On the left, there is a list of fields: Work Order, Description, Status, Region, Facility, Property, Project, Problem Code, Type, Category, Institution, Department, Organization, Requestor, Contact, Contact Phone. Each field has a dropdown menu with an equals sign (=) and a text input field. There are also small circular icons next to some fields. At the bottom left, there is a copyright notice: '(c) 2007 MAXIMUS'. An 'Add Query' button with a green plus sign is visible in the top right corner.

4. Enter a descriptive Name for the Query, and choose the WorkDesk display options. Click the DONE Icon to continue
 - a. If Work Desk and Work Desk Count are left at No, then the saved query will not show up on the WorkDesk, but will be available as a saved search at the screen level.
 - b. If Work Desk is set to Yes, then the saved query will show up on the WorkDesk without a record count
 - c. If Work Desk Count is set to Yes, then the saved query will show up on the WorkDesk with a record count

5. Set the Search Criteria and click the SAVE Icon

6. Return to the WorkDesk to view the new Personal Query

Module ▾ Work Management ▾ Setup ▾ VIEW WORK ORDERS	
WorkDesk 	
Quick Links edit x <ul style="list-style-type: none">COUNTER RELEASECOUNTER RETURNVIEW WORK ORDERS	Administrator Messages edit x <ul style="list-style-type: none">6/28/07 8:47 AM ~ RCROSS ~ FMAX TRAINING 6/25/07 - 6/29/076/28/07 8:47 AM ~ RCROSS ~ WELCOME TO FACILITYMAX - YOU ARE CURRENTLY LOGGED INTO THE TEST SYSTEM
Report Listing edit x <ul style="list-style-type: none">WORK ORDER PRINT	Personal Query Count edit x <ul style="list-style-type: none">7 Work Management ~ Work Order ~ ELECTRICAL PHASE IN ACTIVE STATUS
Approvals edit x	

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EDIT A PERSONAL QUERY

1. Click on the Personal Query on the WorkDesk that will be edited

Module Work Management Setup VIEW WORK ORDERS

WorkDesk

Quick Links edit x <ul style="list-style-type: none"> COUNTER RELEASE COUNTER RETURN VIEW WORK ORDERS 	Administrator Messages edit x <ul style="list-style-type: none"> 6/28/07 8:47 AM ~ RCROSS ~ FMAX TRAINING 6/25/07 - 6/29/07 6/28/07 8:47 AM ~ RCROSS ~ WELCOME TO FACILITYMAX - YOU ARE CURRENTLY LOGGED INTO THE TEST SYSTEM
Report Listing edit x <ul style="list-style-type: none"> WORK ORDER PRINT 	Personal Query Count edit x <ul style="list-style-type: none"> 7 Work Management - Work Order ~ ELECTRICAL PHASE IN ACTIVE STATUS
Approvals edit x	

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2. Click on the SEARCH Icon in the upper right corner of the screen

Module Work Management Setup VIEW WORK ORDERS

Work Order

Work Order ↑	Description	Status	Type	Category	Region	Facility	Property	Requestor	Date Cr	Search
001516	RM 114: LIGHT IS BUZZING LOUDLY	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000036	45400	Jun 26, 2007	
001509	REPLACE BALLASTS IN ROOM 205	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000044	31110	Jun 25, 2007	
001496	FIX LIGHT IN THE OFFICE	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000001	24100	Jun 25, 2007	
001495	REPAIR LIGHTS IN OFFICE	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_EAST	000125	20500	Jun 25, 2007	
001493	FIX THE LIGHTS IN THE OFFICE	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_EAST	000017	10110	Jun 25, 2007	
001491	FIX THE LIGHTS IN THE OFFICE	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000026	29000	Jun 25, 2007	
001484	ROOM 103: REPLACE BALLAST IN SECOND ROW OF LIGHTS BY WINDOWS	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000050	45210	Jun 20, 2007	

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- Verify that the correct query Name is listed next to Queries at the top of the screen. Use the dropdown menu to choose a different query to edit if needed

The screenshot shows the 'VIEW WORK ORDERS' interface. At the top, there are navigation menus: 'Module Work Management', 'Setup', and 'VIEW WORK ORDERS'. Below this is a header bar with 'Work Order' on the left and 'Queries ELECTRICAL PHASE IN ACTIVE STATUS' on the right. A dropdown menu is open under 'Queries', showing 'ELECTRICAL PHASE IN ACTIVE STATUS'. The main area contains a list of search criteria for various fields: Work Order, Description, Status, Region, Facility, Property, Project, Problem Code, Type, Category, Institution, Department, Organization, Requestor, Contact, and Contact Phone. Each field has a dropdown menu with '=' and a text input field. The footer contains '(c) 2007 MAXIMUS'.

- Edit the Search Criteria as needed. Click the SAVE Icon

This screenshot is similar to the previous one, but the search criteria for the 'Type' field has been changed to '<>' and 'ADMINISTRATIVE'. A 'Save Query' button is visible in the top right corner of the main area. The rest of the interface, including the navigation menus and other search criteria, remains the same. The footer contains '(c) 2007 MAXIMUS'.

DELETE A PERSONAL QUERY

1. Click on the Personal Query on the WorkDesk that will be deleted

Module Work Management Setup VIEW WORK ORDERS

WorkDesk

Quick Links edit x <ul style="list-style-type: none"> COUNTER RELEASE COUNTER RETURN VIEW WORK ORDERS 	Administrator Messages edit x <ul style="list-style-type: none"> 6/28/07 8:47 AM ~ RCROSS ~ FMAX TRAINING 6/25/07 - 6/29/07 6/28/07 8:47 AM ~ RCROSS ~ WELCOME TO FACILITYMAX - YOU ARE CURRENTLY LOGGED INTO THE TEST SYSTEM
Report Listing edit x <ul style="list-style-type: none"> WORK ORDER PRINT 	Personal Query Count edit x <ul style="list-style-type: none"> 7 Work Management - Work Order ~ ELECTRICAL PHASE IN ACTIVE STATUS
Approvals edit x	

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2. Click on the SEARCH Icon in the upper right corner of the screen

Module Work Management Setup VIEW WORK ORDERS

Work Order

Work Order ↑	Description	Status	Type	Category	Region	Facility	Property	Requestor	Date Cr	Search
001516	RM 114: LIGHT IS BUZZING LOUDLY	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000036	45400	Jun 26, 2007	
001509	REPLACE BALLASTS IN ROOM 205	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000044	31110	Jun 25, 2007	
001496	FIX LIGHT IN THE OFFICE	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000001	24100	Jun 25, 2007	
001495	REPAIR LIGHTS IN OFFICE	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_EAST	000125	20500	Jun 25, 2007	
001493	FIX THE LIGHTS IN THE OFFICE	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_EAST	000017	10110	Jun 25, 2007	
001491	FIX THE LIGHTS IN THE OFFICE	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000026	29000	Jun 25, 2007	
001484	ROOM 103: REPLACE BALLAST IN SECOND ROW OF LIGHTS BY WINDOWS	OPEN	MAINTENANCE	CORRECTIVE	ALBANY	UW_WEST	000050	45210	Jun 20, 2007	

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3. Verify that the correct query Name is listed next to Queries at the top of the screen. Use the dropdown menu to choose a different query to delete if needed

The screenshot shows the 'VIEW WORK ORDERS' interface. At the top, there are navigation menus: 'Module' (Work Management), 'Setup', and 'VIEW WORK ORDERS'. Below this is a header bar with 'Work Order' on the left and 'Queries' on the right, which has a dropdown menu currently displaying 'ELECTRICAL PHASE IN ACTIVE STATUS'. The main area contains a list of fields for a work order, each with a dropdown menu and a search icon. The fields are: Work Order, Description, Status, Region, Facility, Property, Project, Problem Code, Type, Category, Institution, Department, Organization, Requestor, Contact, and Contact Phone. The 'Type' field is currently set to 'ADMINISTRATIVE'. At the bottom left, there is a copyright notice: '(c) 2007 MAXIMUS'.

4. Click on the DELETE QUERY Icon with the red minus sign to delete the query

This screenshot is similar to the previous one, showing the 'VIEW WORK ORDERS' interface. The 'Queries' dropdown menu is still set to 'ELECTRICAL PHASE IN ACTIVE STATUS'. In this view, the 'Type' field is set to 'ADMINISTRATIVE'. A red minus sign icon, used for deleting queries, is highlighted in the top right corner of the interface. The rest of the interface, including the field list and the '(c) 2007 MAXIMUS' copyright notice, remains the same.

5. Return to the WorkDesk to verify the query has been removed

Module ▾ Work Management ▾ Setup ▾ VIEW WORK ORDERS	
WorkDesk 	
Quick Links edit x <ul style="list-style-type: none">COUNTER RELEASECOUNTER RETURNVIEW WORK ORDERS	Administrator Messages edit x <ul style="list-style-type: none">6/28/07 8:47 AM ~ RCROSS ~ FMAX TRAINING 6/25/07 - 6/29/076/28/07 8:47 AM ~ RCROSS ~ WELCOME TO FACILITYMAX - YOU ARE CURRENTLY LOGGED INTO THE TEST SYSTEM
Report Listing edit x <ul style="list-style-type: none">WORK ORDER PRINT	Personal Query Count edit x
Approvals edit x	
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