

# IBM Maximo Asset Management V 7.1

## Creating and using a query by example



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This is a training module for Maximo® Asset Management version 7.1. In this module, you learn to create, save, update, and run a query by example within the Maximo user interface.

## Objectives

When you complete this unit, you can perform these tasks: :

- Create a query by example
- Run a query by example
- Save a query by example
- Run a saved query by example
- Update the 'where' clause of a query

In this module you will cover these topics:

- Creating a query by example
- Running a query by example
- Saving a query by example
- Running a saved query by example
- Updating the where clause of a query

## Building queries

Easy-to-use method to build queries

- You can create and save new queries by using the list fields and the More Search Fields window
- You can directly modify where clauses to limit the result set

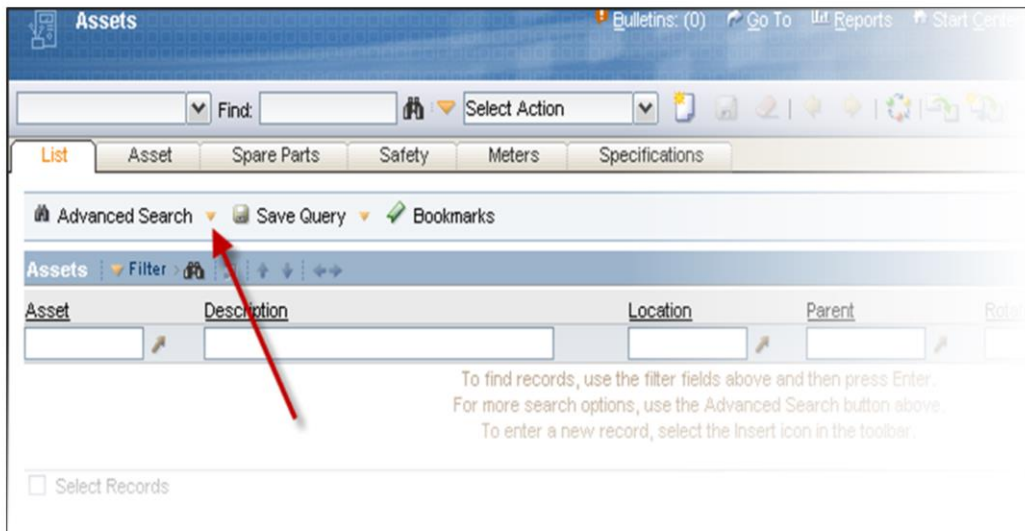
Query by example is an easy-to-use method for building queries that you can run within the Maximo user interface.

You can create new queries, based on the search fields within an application or from the More Search Fields window. You can save the queries for later use.

You can change the where clause that the query uses for filtering results further.

## Creating a new query

Click the **Advanced Search** list menu, and click **More Search Fields**



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In this example you create a new query that runs in the asset application.

The same method of creation can be used within many other Maximo applications.

To start creation of a new query, you click the **Advanced Search** list menu and click the **More Search Fields** option. This action opens the More Search Fields Current Query window.

## Choosing a field that you want to search the values for

Click the arrow next to the field that you want, and click the **Select Value** option

More Search Fields| Current Query:

Asset	<input type="text"/>		<input type="text"/>		Type	<input type="text"/>	
Parent	<input type="text"/>		<input type="text"/>		Status	<input type="text"/>	
Search Asset Hierarchy	<input type="text"/>				Site	=BEDFORD	
Location	<input type="text"/>		<input type="text"/>		Priority	<input type="text"/>	
Location Type	<input type="text"/>				Moved?	<input type="text"/>	
Search Location Hierarchy	<input type="text"/>				Serial #	<input type="text"/>	
Rotating Item	<input type="text"/>		<input type="text"/>		Bin	<input type="text"/>	
Meter Group	<input type="text"/>		<input type="text"/>		User	<input type="text"/>	
Usage	<input type="text"/>				Custodian	<input type="text"/>	
Vendor	<input type="text"/>		<input type="text"/>		Failure Class	<input type="text"/>	
Manufacturer	<input type="text"/>		<input type="text"/>		GL Account	<input type="text"/>	
Classification	<input type="text"/>				Calendar	<input type="text"/>	
Service Group	<input type="text"/>				Service	<input type="text"/>	

Dates

From To

Find Restore Application Defaults Revise Cancel

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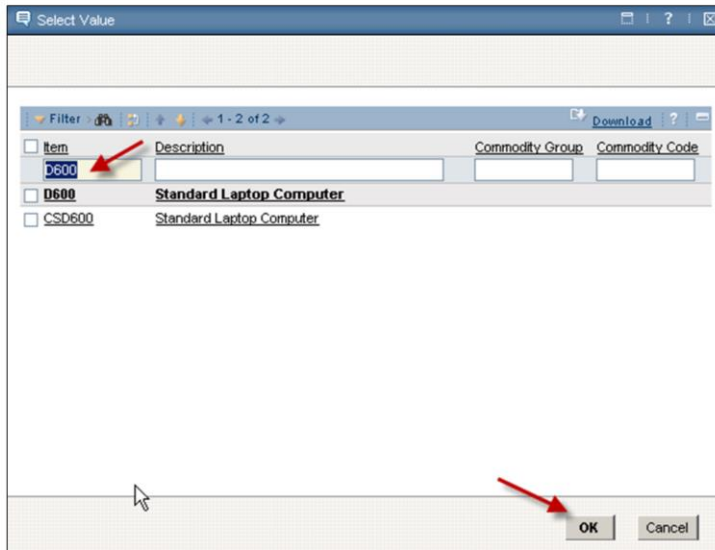
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In the More Search Fields Current Query window, click the arrow to the right of the field that you want filter, and click the **Select Value** option. This action opens a list in the Rotating Items window.

## Selecting the value for the filter

Select the value that you want to filter



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You can select an item value from the list by clicking it.

You can also type an item value into the item field, and click the **OK** button to confirm the selection.

Optionally, you can use the search field for helping find the required value.

## Adding a second filter

Use the same method to add a second filter

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Location	Description	Type	Site
<input type="checkbox"/> HWSTOCK	IT Hardware Cage	OPERATING	BEDFORD
<input type="checkbox"/> HWMCLEAN		STOREROOM	BEDFORD
<input type="checkbox"/> STHFLHWSTOCK	7900 West Park Drive - 5th Floor Hardware Stock	OPERATING	MCLEAN

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You can choose another field to filter by using the same method:

1. Click the arrow next to the relevant field.
2. Choose the select value option.
3. Pick the required value to use as an additional filter.

## Running the query

Click **Find** to run the query

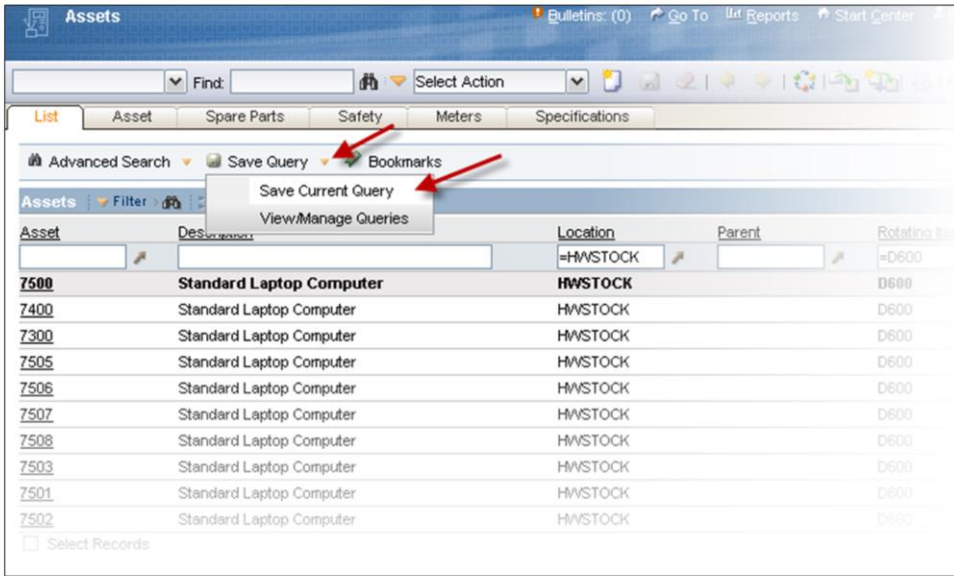
The screenshot shows a window titled "More Search Fields Current Query:" with a search interface. The interface is divided into two columns of search fields. The left column includes: Asset, Parent, Search Asset Hierarchy, Location (with a dropdown menu showing "HAWSTOCK"), Location Type, Search Location Hierarchy, Rotating Item (with a dropdown menu showing "D600"), Meter Group, Usage, Vendor, Manufacturer, Classification, and Service Group. The right column includes: Type, Status, Site (with a dropdown menu showing "BEDFORD"), Priority, Moved?, Serial #, Bin, User, Custodian, Failure Class, GL Account, Calendar, and Service. Below the search fields is a "Dates" section with "From" and "To" input fields. At the bottom of the window, there is a "Find" button with a red arrow pointing to it, along with "Restore Application Defaults", "Revise", and "Cancel" buttons. The footer of the window contains the number "8", the text "Creating and using a query by example", and the copyright notice "© 2011 IBM Corporation".

The More Search Fields Current Query window shows the two filters that you entered. Click the **Find** button to start the query.



## Saving the query

The query results are now viewable. To save the query, click **Save Query > Save Current Query**



The screenshot shows the IBM Assets management interface. The top navigation bar includes 'Assets', 'Bullets: (0)', 'Go To', 'List Reports', and 'Start Center'. Below this is a search bar with 'Find:' and a 'Select Action' dropdown. The main content area has tabs for 'List', 'Asset', 'Spare Parts', 'Safety', 'Meters', and 'Specifications'. A 'Save Query' button is highlighted with a red arrow, and a dropdown menu is open, showing 'Save Current Query' and 'View/Manage Queries', with 'Save Current Query' also highlighted by a red arrow. Below the menu is a table of assets.

Asset	Description	Location	Parent	Rotating Inventory
7500	Standard Laptop Computer	HWSTOCK		D600
7400	Standard Laptop Computer	HWSTOCK		D600
7300	Standard Laptop Computer	HWSTOCK		D600
7505	Standard Laptop Computer	HWSTOCK		D600
7506	Standard Laptop Computer	HWSTOCK		D600
7507	Standard Laptop Computer	HWSTOCK		D600
7508	Standard Laptop Computer	HWSTOCK		D600
7503	Standard Laptop Computer	HWSTOCK		D600
7501	Standard Laptop Computer	HWSTOCK		D600
7502	Standard Laptop Computer	HWSTOCK		D600

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The results of the query are displayed. To save the query for later, click the **Save Query** list menu, and click the **Save Current Query** option.

## Naming the query

1. Enter a Query name and a description
2. Select check boxes for making the query public, default, or both
3. Click **OK**

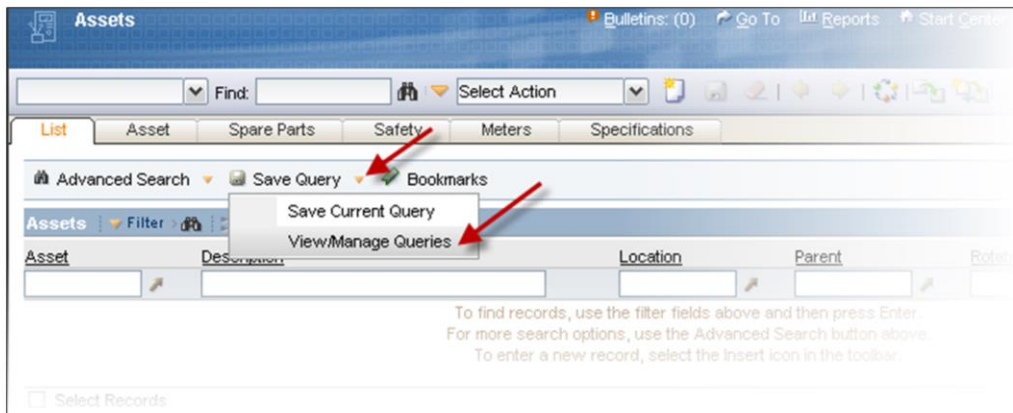


The screenshot shows a dialog box titled "Save Current Query". It has a "Query Name" field with the text "Assetsquery1" and a "Description" field with the text "First saved query for assets". Below these fields are two checkboxes: "Public?" and "Default?", both of which are unchecked. At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

Enter a Query Name for the saved query. Entering a description is optional. Next, you select public if you want the query to be generally available to all. You select default if the query should be run when entering the application. You do have the option to select both public and default. After making your selection click the O K button to save the query.

## Running the saved query (1 of 2)

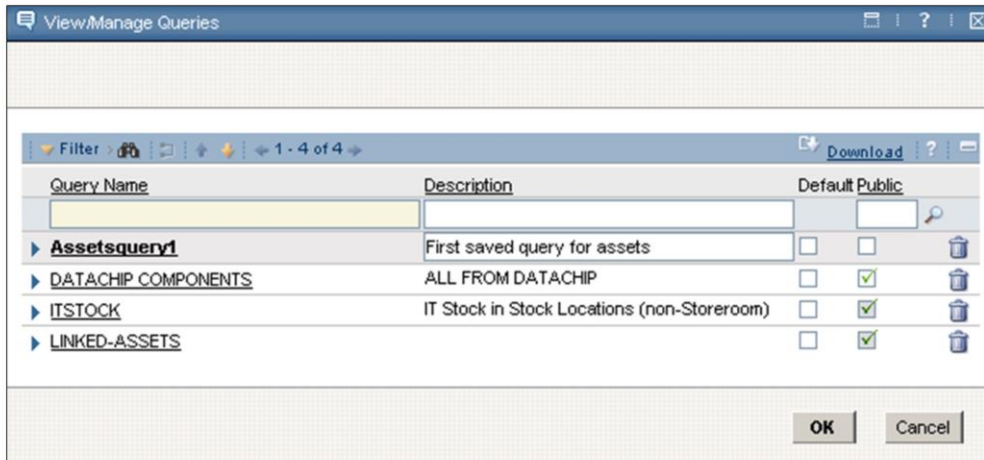
Click the **Save Query** list menu, and click the **View/Manage Queries** option



To run the saved query, click the **Save Query** list menu as before, but this time, click the **View Manage Queries** option.

## Running the saved query (2 of 2)

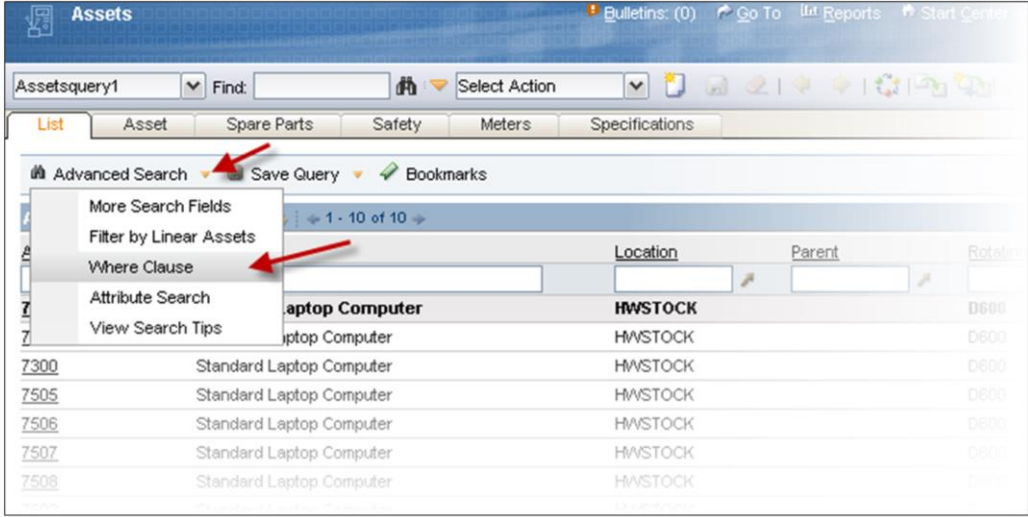
Click **OK** to run it



Run the saved query and display the results.

## Manipulating the 'where' clause

Modify the where clause of the query that you ran by clicking **Advanced Search > Where Clause**



The screenshot shows the IBM Assets application interface. At the top, there is a navigation bar with 'Assets' and 'Bulletins: (0)'. Below this is a search bar with 'Assetsquery1' and a 'Find:' field. A 'Select Action' dropdown menu is also visible. The main content area has a 'List' tab selected, and a table of assets is displayed. The 'Advanced Search' menu is open, showing options: 'More Search Fields', 'Filter by Linear Assets', 'Where Clause', 'Attribute Search', and 'View Search Tips'. The 'Where Clause' option is highlighted with a red arrow. The table below shows columns for 'Asset', 'Location', 'Parent', and 'Rotation'. The first row is 'Laptop Computer' at 'HWSTOCK' with a rotation of 'D600'. Subsequent rows show 'Standard Laptop Computer' at 'HWSTOCK' with rotations 'D600', 'D600', 'D600', 'D600', and 'D600'.

Asset	Location	Parent	Rotation
Laptop Computer	HWSTOCK		D600
Laptop Computer	HWSTOCK		D600
7300 Standard Laptop Computer	HWSTOCK		D600
7505 Standard Laptop Computer	HWSTOCK		D600
7506 Standard Laptop Computer	HWSTOCK		D600
7507 Standard Laptop Computer	HWSTOCK		D600
7508 Standard Laptop Computer	HWSTOCK		D600

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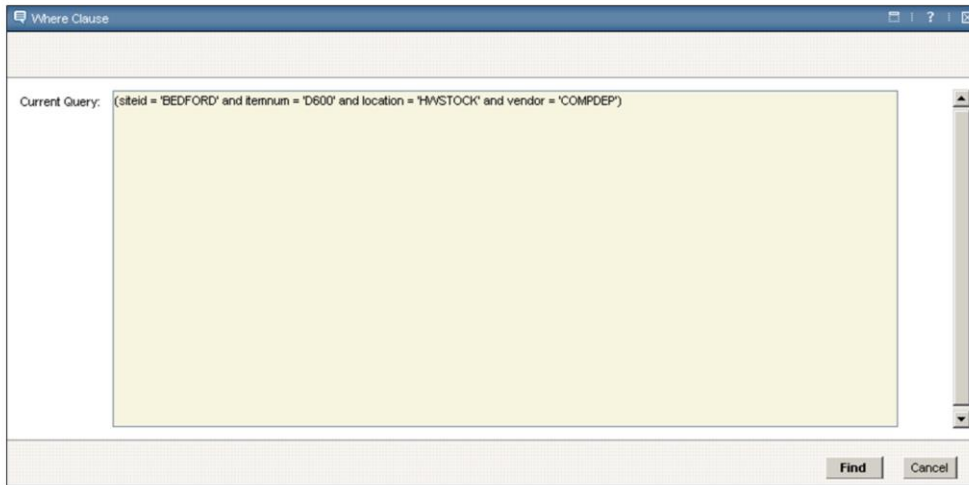
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To alter the where clause of the query that just ran, click the **Advanced Search** list menu and click the **Where Clause** option.

## Querying by example (1 of 2)

Make required changes to the where clause, and click **Find**

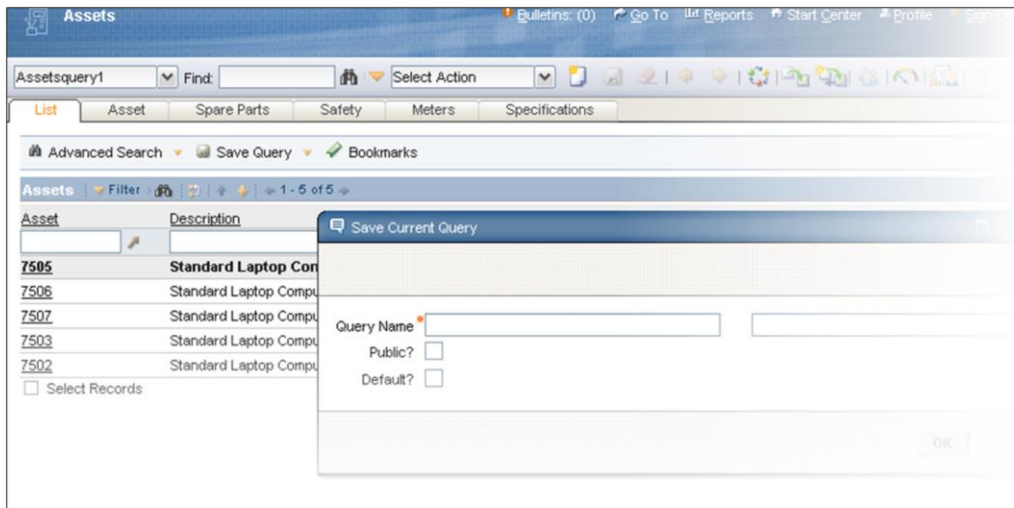


Make required changes to the where clause and click the **Find** button to start the new query.

In this example, an additional filter, *vendor equals COMPDEP*, has been added to the query.

## Querying by example (2 of 2)

Save the new query the same way that you saved the first query with **Save Query**



You can save the new query the same way you did the original query by using the **Save Query** option. You should give an appropriate name to the new query.

## Summary

Now that you have completed this unit, you can perform these tasks:

- Create a query by example
- Run a query by example
- Save a query by example
- Run a saved query by example
- Update the 'where' clause of a query

You have completed the training module. You should now be able to perform these tasks:

- Creating a query by example
- Running a query by example
- Saving a query by example
- Running a saved query by example
- Updating the where clause of a query



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