PM Coordinator

Computerized Maintenance Management System v8 NET

SIMPLICITY SOFTWARE TECHNOLOGIES INC.

This is part of the Maintenance Coordinator System
But is sold seperately

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Table of Contents

Getting Started

The procedures presented herein assume that the purchaser of this product has basic computer skills and has used the Windows environment in the past. Many of the functions such as file open, file save, run option and the like can change depending on the operating environment the application is executed in. In such cases please refer to the user's manual for that environment (supplied by that vendor).

Administrator Rights

Throughout the documentation we talk about logging into the system as a user with Admin or Administrator rights. In PM Coordinator, and the lack of user accounts, all users have Administrator rights.

Installing the Application

PM Coordinator can be supplied to you a few different ways. We can send you a compact disk (CD), DVD, and the software can be downloaded.

> ***IMPORTAND NOTE: If you already have a demo of the software installed, re-installation may not be required. Just activate the demo.***

To install PM Coordinator onto your computer:

FROM DOWNLOAD

- Create a directory or folder on your local hard drive to download the file to.
- From the web-site, click on the appropriate download link to begin the download.
- Save the file to the directory you created above.
- Run the downloaded application to start the installation process.
- Follow on screen instructions.

FROM CD OR DVD

- Insert the CD or DVD into an available reader. If your computer is setup correctly, the program should run automatically.
- If the program doesn't start automatically:
    - Click the **Start** menu and choose the **Run** option.
    - Click the Browse button and navigate to your media reader.
    - Select the **Setup.exe** application on the root directory of the CD/DVD.
    - Click **Open**.
    - Click **OK**.
- Click the Install Products option.
- Click on the option that best describes the application you want to install.

- Follow on screen instructions.

Installing for Network Use

Please note that a Network/Site License must have been purchased to use the routines outlined in this section. If such a license has not been purchased then your databases must reside on the local **C:** drive.

To install the program for use on a network, please follow these steps:

- Install the program on each client computer as you would as if it was a single user setup (previous section).
- Activate the software on each computer it's installed to. ***If not activated, network paths will not be allowed.***
- Copy the databases used by the program to a sharable network drive. These are the files with an .mdf file extension.
- Also copy the database's associated transaction log file. This file will have an extension of .ldf, and shares most of the same name as the database file it's associated with.
- Set up the database connections to use the copied databases.

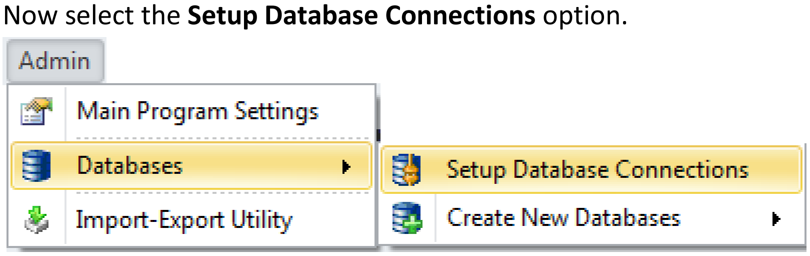
Setting up Database Connections

By default, the databases used by the **PM Coordinator** system are installed to the **C:\PM Coordinator NET** folder. It is highly recommended that you leave a set of these databases in this location. However, there are occasions when you want them to reside in other locations, such as on a network drive or share. When moving the databases, we recommend copying the databases to the new location.

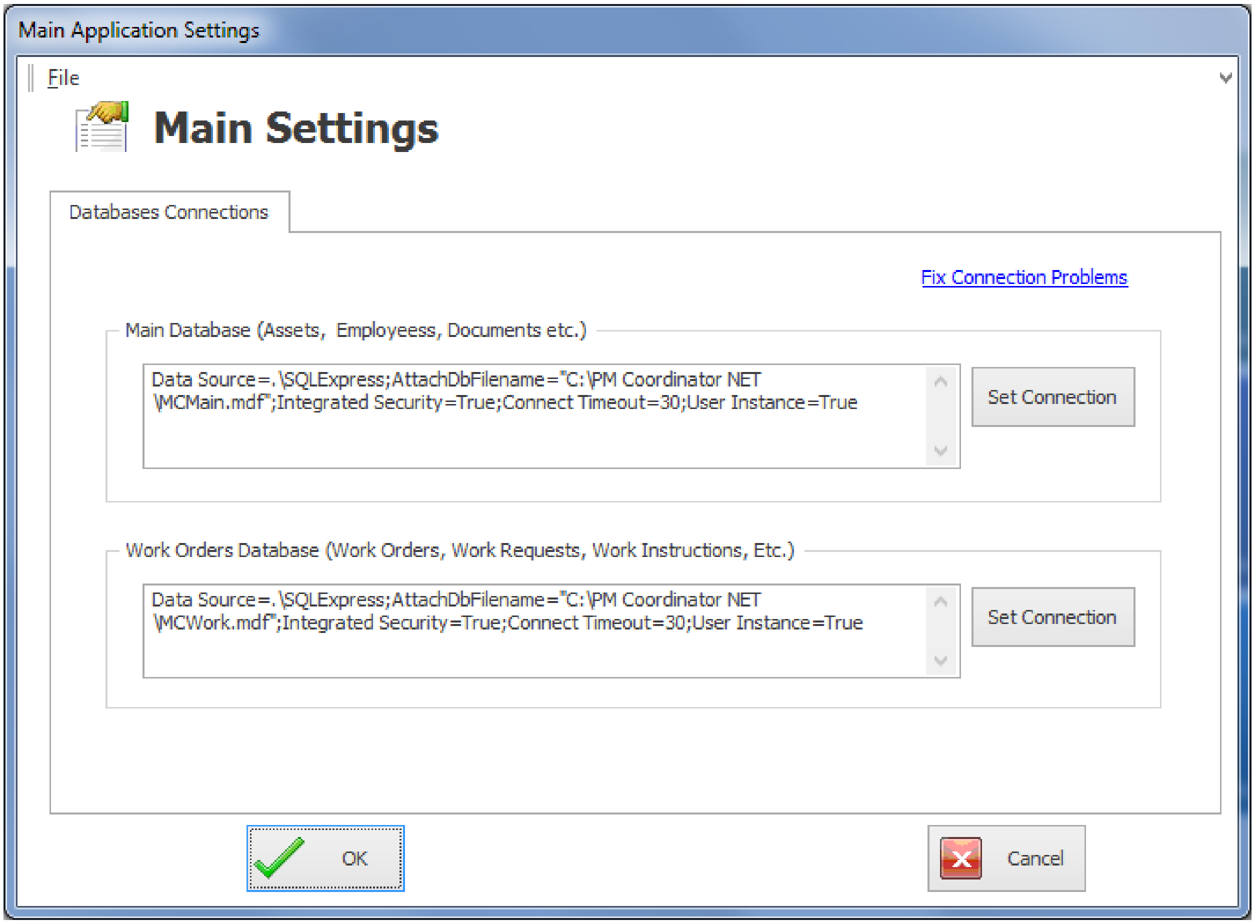
> ***Please note that a Network/Site License must have been purchased to network the databases.***

To setup your database connections:

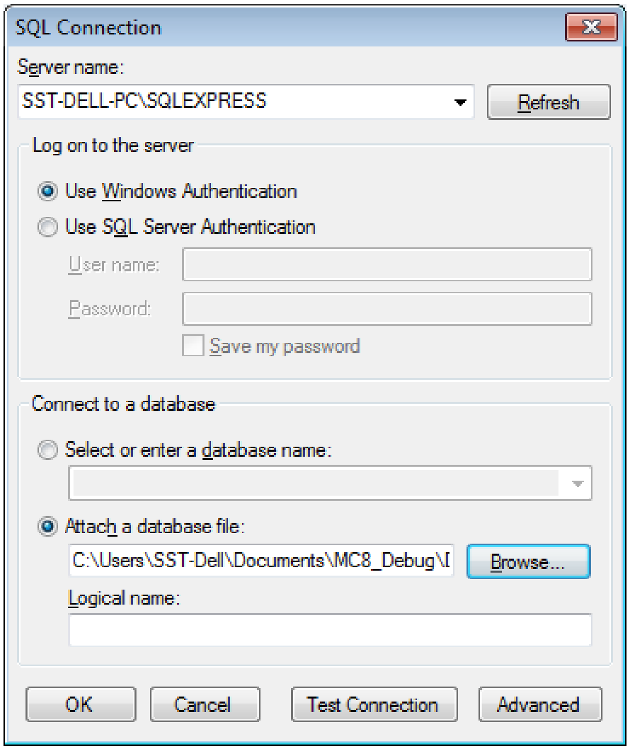
- Log in to the program as a user with administrator rights.
- From the main start menu, open the **Admin** drop down menu and select the **Databases** option.
- Now select the **Setup Database Connections** option.



- From the invoked **Settings** dialog, move to the **Main Database** group and click on the **Set Connection** button.



- This will invoke the **SQL Connection** dialog screen as shown in the following illustration:

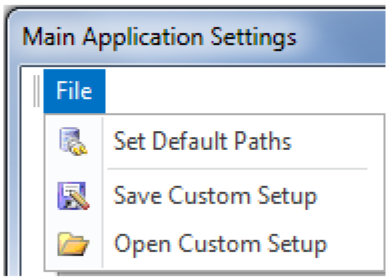


- Move to the **Sever name** drop down box and select the name of your instance of the SQL server you're using. If the server is not listed, try clicking on the **Refresh** button.
- Move to the **Log on to the server** group and setup your log on authentication information.
    - **Using SQL Express** - If you are using the Express database engines as supplied by us, you'll probability want to check the **Use Windows Authentication** option.
    - **SQL Server** - If you are connecting to full blown SQL Server then complete the **SQL Server Authentication** information.
        - Check the **Use SQL Server Authentication** option.
- Fill in the **User Name** and **Password** fields.
- Next move to the **Connect to a database** group to connect to the actual database.
    - **SQL Server**:
        - Check the **Select or enter a database name** option.
        - Move to the drop down found here and either select or enter the name of the database you are connecting to.
    - **SQL Express**: (Attached database file)
        - Check the **Attach a database file** option.
        - Either use the **Browse** button here to select the database file, or type in the full path to the database (mdf) file in the space provided.
- **Test Connection** – Move to and click on the **Test Connection** button to ensure you have a good connect. If it fails, you may want to click on the **Advanced** button to further define you connection properties.
- Click on the **OK** button.
- Repeat the above steps for the remaining databases that require setup.

Using Multiple Database Configurations

Saving and Opening Database Settings

You can create different database setups to be used at different times. For example, if you use a laptop you could have a setup saved for use at home and one for work.



To save the current setup

- Setup all the connections for all the databases as you would like to save.
- Open the **File** menu and select the **Save Custom Setup** option.
- Use this **Save As** dialog as normally found in Windows. Make the file name something like Home, Office or Work, and click the **Save** button.

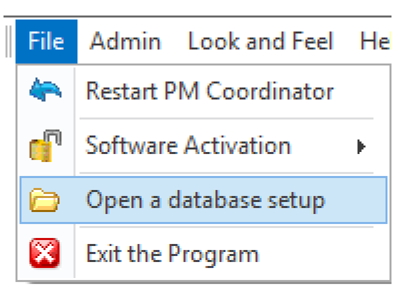
To open a saved setup

- Move to the **Connection Settings** dialog.
- Open the **File** menu and select the **Open Custom Setup** option.
- Use the invoked **File Open** dialog as you would any File Open dialog found in Windows, locating the setup file you wish to open.
- Click on the **Open** button.

Opening Different Databases Connections at Startup

Once you have saved various database connection setups, you can open one of these setups from the main menu of the application. This feature can come in handy for a variety of reasons. A couple of good examples are when you have database setups for either different clients, or different plant locations.

To open a saved database setup:



- Start **PM Coordinator** in your normal manner.
- Open the **File** drop down menu from the main menu of the program, and then choose the **Open a database Setup** option.
- Use this file open dialog to select one of your saved setups.
- Click open and the program will restart with the new setting applied.

Brief Description of the Databases

- **Main Database** - This database holds the main information or tables dealing with **PM Coordinator**. Some of the included tables are HR (Employees), Inventory and Parts, Contacts and Vendors, Maintenance Documents, Main Programs settings and User Accounts.
- **Work Orders Database** – This database hold everything dealing with work orders and PMs. This also includes work instructions and time tracking information.

Running the Program

Once the program has been successfully installed onto your computer, you can now begin using it by following the next instructions:

- Click the **Start** button for Windows XP or later.
- Click **SST** then the **PM Coordinator** option to start the program.
  OR
- Click the **PM Coordinator** icon on your desktop.

Activating or Validating the Software

The primary way the software is validated or activated is through email, the general procedure for this is as outlined next:

To activate the application from an email message (Outlook example):

1. Open the Email in **Microsoft Outlook**.
2. Open the **File** menu and select the **Save Attachments** option.
3. The **Save Attachment** dialog opens.
4. Browse to the following directory:
   Documents/PM Coordinator
5. Click on the **Save** button, replacing any existing files.
6. Run the program and it should turn into a full working version.

Validating from Demo Mode

To unlock a demo version into a full working version please follow these steps:

- The application must first be purchased and an activation file supplied by Simplicity Software Technologies Inc. The name of the activation file is: **MC_Act.lic**.
- Run the application in your normal manner.

- From the **Running In Demo Mode** screen, move to and click the **Activate Software** button.
- From this common **Open** file type dialog, browse to where you saved the activation file as supplied from Simplicity Software Technologies. The file name should be: **MC_Act.lic**
- Select the file and click **Open.**
- The program should now be a full working version.

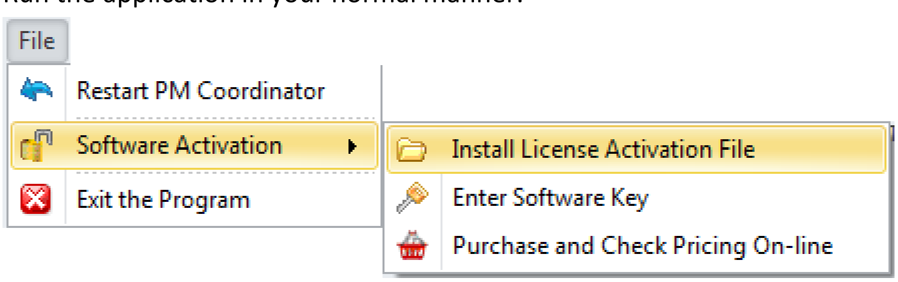
Validating from within the Application

To activate the software from within the application, please follow these steps:

> ***Note this procedure can also upgrade the application with newly purchased features.***

The application must first be purchased and an activation file supplied by Simplicity Software Technologies Inc. The name of the activation file is: **MC_Act.lic**.

- Run the application in your normal manner.



- Open the **File** menu and expand the **Software Activation** sub menu.
- Click on **Install License Activation File** option.

- From the common **Open** file type dialog, browse to where you saved the activation file as supplied from Simplicity Software Technologies. The file name should be: **MC_Act.lic**
- Select the file and click **Open.**
- Restart PM Coordinator.
- The program should now be a full working version.

Activation Files

Please note that this activation file can be distributed to you through email or on other computer media. This file must be kept in a safe location and will be needed to activate the software on any computer or terminal it will be installed on. Feel free to make a single copy of this activation file for safeguarding.

> ***Be aware that sharing the Activation file with persons or organizations other that who it licensed to is strictly prohibited, and is in violation of federal and international copyright laws. Both parties could be prosecuted.***

IMPORTANT NOTE – Please note that validating the software is only part of the activating procedure. This step will only unlock a demo for a period of at least 45 days. In order to continue to use the software a **Software Key** must also be entered. Also note that the software will function without any limitations whatsoever within this 45 day period.

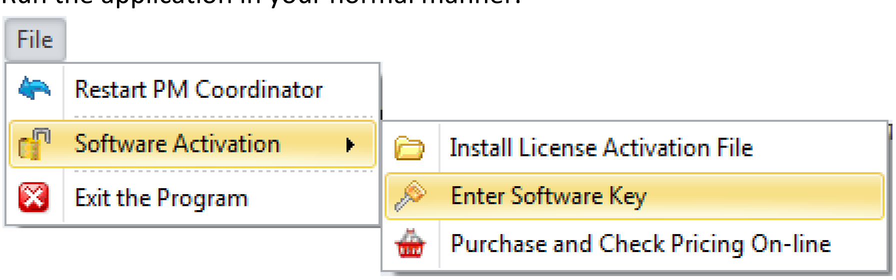
Entering a Software Key

Once the inspection period (30 day return policy)has expired and full payment has been secured by Simplicity Software Technologies Inc. you will be supplied a software key. Once the software key has been supplied we recommend that you enter it immediately. If not entered within 45 days of the activation date, the software will lock you out.

Also note that we normally use first class mail to deliver these software keys to you, so please be on the lookout for this letter.

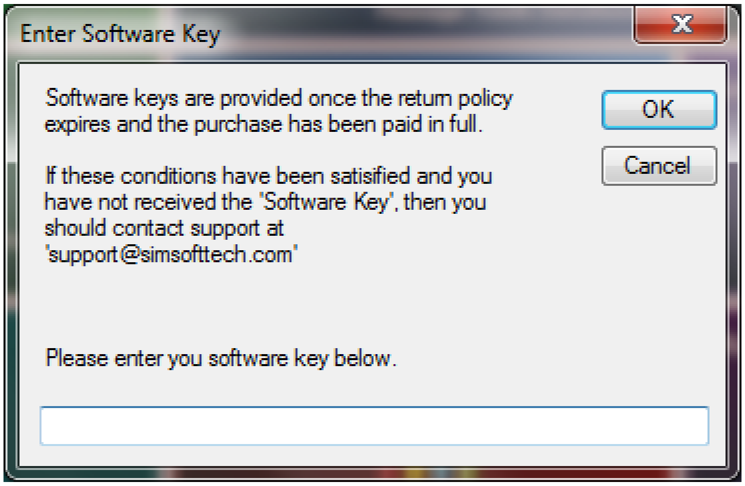
To enter your software key:

- Run the application in your normal manner.



- Open the **File** menu and expand the **Software Activation** sub menu.

- Click on **Enter Software Key** option.



- Enter the key in the space provided and click **OK**.

Why Software Keys

Software keys are our way of extending credit to our customers. When the software is waiting for a software key to be issued, it operates without limitation for a period of not less than 45 days. Most, if not all our software offerings carry a 30-days money back guarantee, and also have a net due with the same time period. Software keys allow us to honor both of these conditions.

INPORTANT NOTE: As with validating the software, the software key must also be used for each installation. Please keep the software key information and the activation file in a safe place.

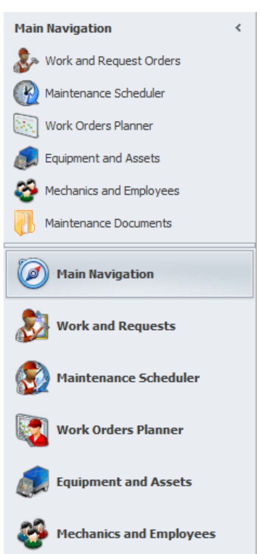
Moving Between Modules

The Maintenance Coordinator program is arranged in modules, with each module providing its own functions and features. The modules are accessed mainly through the use of the program's Main Menu screen.

To navigate between program modules:

Option One

- Move to the main menu and click on a button that best describes the module you want to access.



Option Two – Using the Navigation Bar

The navigation bar is located on the left side of the screen, and can be used to navigate through the components of this program.

- Click on a group within the **Main Navigation** Bar to expand the group and expose its contents. The groups are the larger of the available items shown, with larger text and icons.
- Once a group is expanded, you can click on one of the available options to branch to that component or feature.
- Also note that clicking on a Main Group will normally open that module. The main expection to this rule is the Maintenance Documents option.

Main Program Settings

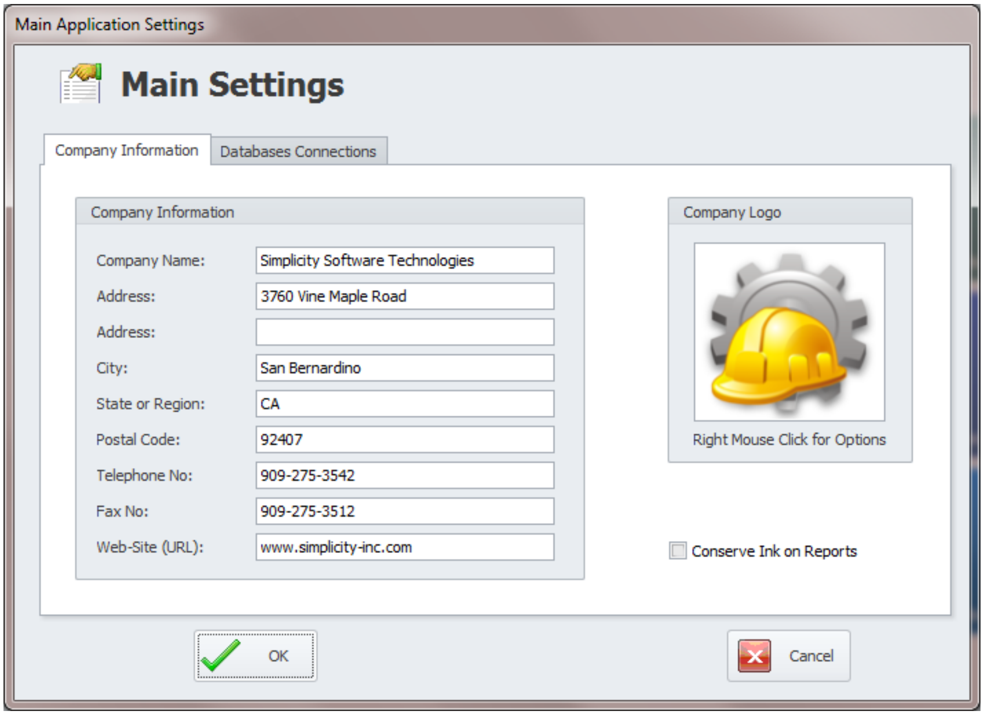
The **Program Setting** allows you setup general features that will be pretty much global to the application. Many of the individual modules in the system can also have other settings that pertain to that module only and in many cases maybe local the activate computer only.

To configure the program settings:

- Login to program with Administrator rights.
- Move to the **Main Menu** screen of the program.
- Open the **Admin** drop down menu and select the **Main Program Settings** option.

Company Information and Logo

The information found on this tab can be used on various documents generated by the application.



To setup your company information and logo:

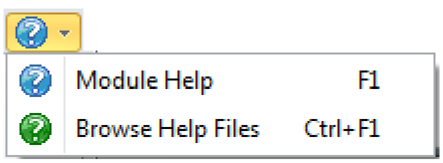
- Move to the **Company Information** tab.
- Move through the various fields of this tab, and enter the appropriate information for each of the fields. The following explains the fields on this tab:
    - **Company Name** – This alpha/numeric field can contain up to 50 characters and is used to maintain your company's name.
    - **Address** – These two alpha/numeric fields can contain 50 characters each. Use these fields to record street and PO Box information.
    - **City** - This alpha/numeric field can contain up to 50 characters and is used to maintain the city your company is located in.
    - **State or Region -** This alpha/numeric field can contain up to 50 characters and is used to maintain the state or region your company is located in.
    - **Postal Code -** This alpha/numeric field can contain up to 12 characters and is used to maintain your postal or zip code.

- **Telephone No** - This alpha/numeric field can contain up to 20 characters and is used to maintain your telephone number.
- **Fax No** - This alpha/numeric field can contain up to 20 characters and is used to maintain your fax number.
- **Web-Site** – There is no size limitation to this alpha/numeric field and is used to store company's web site or URL.
- **Company Logo** – This image should measure approximately 1 inch by 1 inch, and supports the following formats: bmp, gif, jpg, ico, png and tif.

Getting Instant Help

Most, if not all the modules in the system have **Help** documents associated with them. These are accessible from the **Help** drop down menus, normally located on a module main screen.

The following illustrates a typical help menu. These are also normally located on the right side of the ribbon control.



Pressing **F1** from a screen that help is available on, will pull up the main help file associated with the module you are currently working with.

Pressing **F2** will allow you browse and open any of the available help documents.

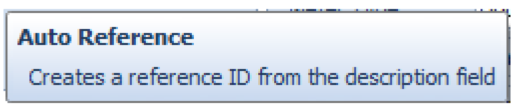
Common Use Features

This section outlines features that are in common use throughout the software system. Some of the features explained here may apply to every module in the system, whereas others may only apply to a couple of modules. By placing common features together we have reduced the documentation size, and hopefully at the same time helped to reduce the learning curve.

Procedures outline in this, and all other chapters assumes the user has basic computer skills and has worked in the Windows environment before. Also note that features such as opening and saving files can change by operating systems and because of this will not be discussed here.

Tool Tips

Many of the controls on a screen or within a ribbon control have what are known as *Tool Tips*. What these actually are, are little help screens that provide information on what a button or control does. The image shown is an example of a tool tip message.



To activate a Tool Tip just place your mouse over a control that supports this feature. If supported, the *Tool Tip* message will be displayed for a few seconds.

Tile Controls

Tile Controls are used though-out the application to provide options to the end user. Introduced with the release of Microsoft’s Windows 8 OS, these graphical buttons work much in the same way as a standard button. We use them with our main menu to allow the user to navigate to the various modules of the system. We also use them with our documents to help represent the document types and access options.

When all the buttons will not fit on a screen, you can click on a non-button area to scroll the control. This is done by clicking and holding the left mouse button and then moving the mouse in the direction you wish to scroll.

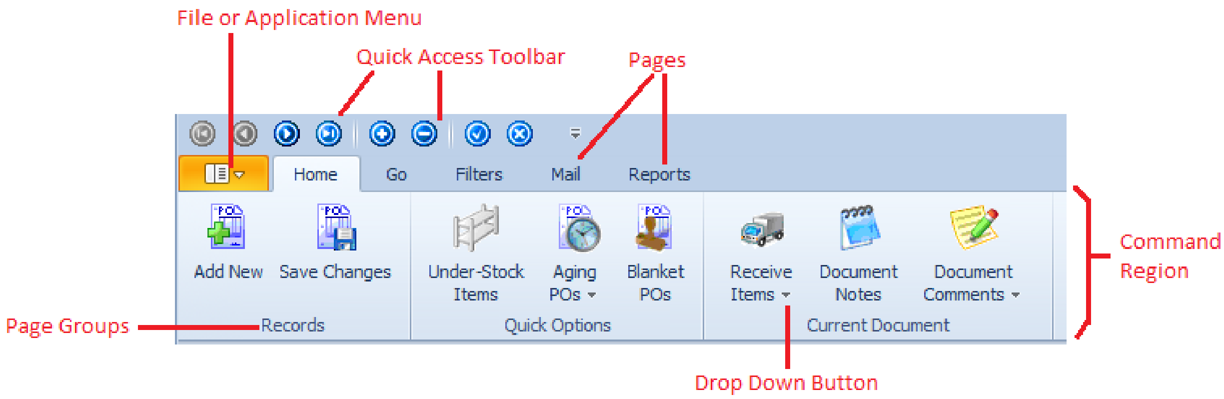
The keyboard **arrow keys** can also be used to navigate through the **Tile Control** buttons. A slight highlight around the button will be displayed to show the selection. Once a button is selected, pressing the **Enter** key will activate the selection.

Using the Ribbon Control

Throughout the application you'll find the state-of-the-art **Ribbon Control**. This is the replacement for the conventional menu control that has been used in applications for years. We have based our control on the most modern Office styles, which is also part of the Microsoft Office Fluent user interface.

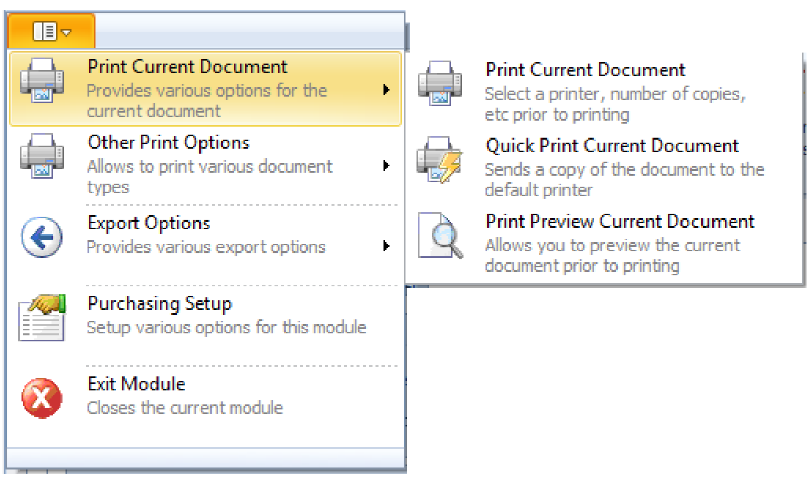
NOTE: This control as with many of the controls used by this system can have their appearances change somewhat by the selected theme in use.

The following illustration outlines the elements of the basic Ribbon Control:



Application Menu (File)

In the upper left hand corner of ribbon control is the Application or File menu button. Clicking on this button opens a drop down that closely resembles the old *File* menu. Once clicked, the user can then click on the various other buttons or options found there.



Please note that in most cases, the Application button is a direct replacement for the File menu.

Quick Access Toolbar

The Ribbon control has a Quick Access Toolbar associated with it. This toolbar normally contains features that are widely used throughout the system. One set controls you'll find in wide use are the data controls that are used to scroll through the records of the database.

Changing Ribbon Pages

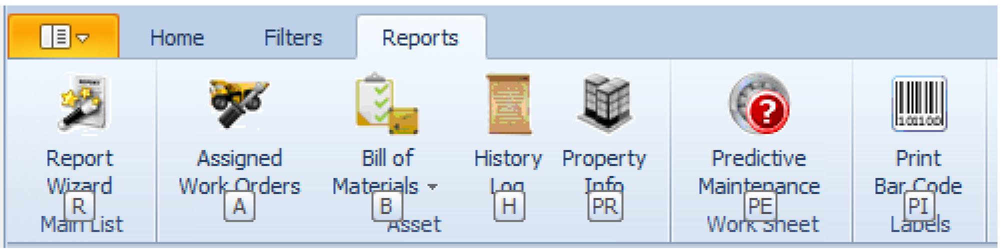
Controls on a ribbon are grouped in Pages. Pages appear on the ribbon with the same look as a conventional tab control. To access controls on different pages simply click on the page header, and then click on the appropriate control.

Command Region

The command region of the ribbon control can contain a variety of different other controls. Examples of controls that may be placed there are buttons, drop drown list, color and font pickers and others. The most common controls found here would be buttons. Clicking a button control normally launches some specific function of the application.

Ribbon – Keyboard Access

The options available on a ribbon control can be accessed by using your keyboard in place of your mouse. This is done with a combination of the 'Alt' and some other combination.



To access options of the ribbon control using your keyboard:

- Press and release the '**Alt**' key. This action will display the available key combinations that can be used.
- To activate an option press the assigned key or keys as displayed. In the example showing, pressing the H key would activate the History Log report option.

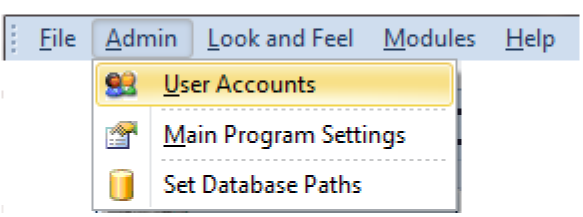
Ribbon – Hot Keys

Like the traditional program menus, ribbon items can be assigned hot key shortcuts. These are keyboard key combinations that access commonly used features. Normally these hot key assignments use the 'Ctrl' key and another key to access a feature. However, other key combinations may also be used.

Some examples of hot key assignments: **Ctrl + N** for new, **Ctrl + S** for save**, Ctrl + C** to copy text, **Ctrl + X** to cut text, **Ctrl + V** to paste text, and many others.

Program Menus

In various places throughout the application are pull-down or program menus that are located directly beneath the screen header or title bars. You'll also notice that these menus will change depending on the screen or module that is currently displayed.



These menu options allow for easy access of many features and functions the program has to offer to the user.

There are a couple of different methods in which the user can access the contents of pull down menus and are outlined next.

- Press the ALT key along with the highlighted letter to access the pull down menus.
- Press the highlighted letter to access the options of that menu.
- Use the arrow keys to highlight the desired menu option and then press ENTER.
- Put the mouse pointer on the desired option, and then click on the menu option of your choice with the left mouse button.

If the menu option of your choice has a HOT KEY assignment, you can use that to select the menu option. Some of the HOT KEYS used by the program are CTRL + X for cutting text, and CTRL + V for pasting text.

Data Controls

Located in various areas of the program are **Data Controls**. These controls allow the user to move through records in a database and when available add, remove, save, and cancel changes to the database.

The two images shown are the two data controls used by the application. The first one is normally found in the ribbon's quick access toolbar, and is normally used to function with a module's main database. The second control is normally used with support databases. Attachments database is a good example.

Not all elements of a data control will be present at all locations it's used. Factors that can affect an element's existence could be a user's rights, or whether the functions are needed.

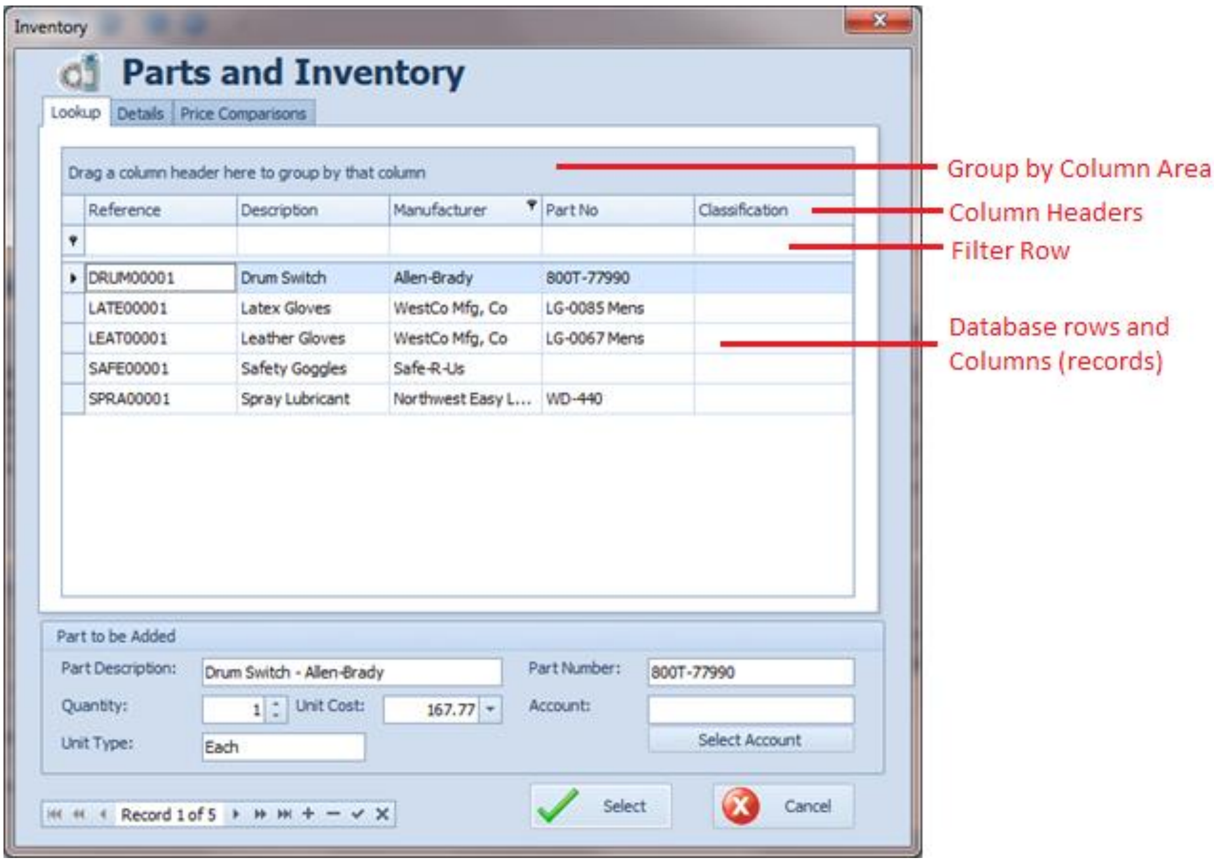
The following are the elements of the data control, reading left to right.

- **Move First** – Moves to the first record in the database.
- **Previous Page** – Moves a page of records at a time (not available in the quick access toolbar).
- **Move Previous** - Moves to the previous record in the database.
- **Move Next** – Moves to the next record in the database.
- **Next Page** – Moves a page of records at a time (not available in the quick access toolbar).
- **Move Last** – Moves to the last record in the database.
- **Add/Append** – Adds a new record to the database.
- **Delete/Remove** – Removes the selected record from the database.
- **Post/Save** – Post or saves recent changes to the database.

- **Cancel Edit** – Cancels recent changes and restores information.

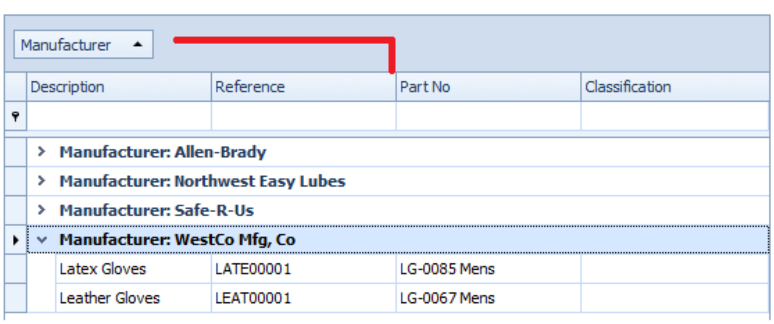
Using the Lookup Grids

Throughout the application you'll find 'Lookup Grids'. These are found on the Lookup tabs of the majority of the modules, they're also found on the majority of assignment dialog screens. The picture provided is an example of a typical Lookup Grid as found on a Lookup (assignment) dialog screen.



Grouping Items

You can group items in the Lookup grid by any of the available columns. Just click and hold the column and then drag and drop it into the area just above the columns headings.



Once grouped, you can expand or collapse a group by clicking on the appropriate symbol adjacent to the group. Also note that you can create a tree type structure with these groups, and you are not limited to a single group.

Filtering Records

To help facilitate the easy lookup of items, most of the lookup grids employ a Filter row. So if you know what you're looking for you can type in this row to filter out unwanted records and narrow down your search.

Drag a column header here to group by that column

Description	Manufacturer	Reference	Part No	Classification
	wes			
Latex Gloves	WestCo Mfg, Co	LATE00001	LG-0085 Mens	
Leather Gloves	WestCo Mfg, Co	LEAT00001	LG-0067 Mens	

To filter records

- Move to the column you want to filter records by and click in the empty row just below the column header.
- Start typing in your filter and watch the grid begins to shrink as you go. Effectively filtering out non matching records.

Resorting the Information

The majority of the Lookup grids used by the application allow you to resort the information by any column of your choosing.

Drag a column header here to group by that column

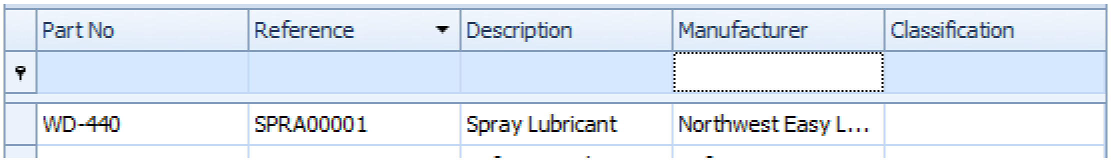
Description	Manufacturer	Reference	Part No	Classification
Drum Switch	Allen-Brady	DRUM00001	800T-77990	
Spray Lubricant	Northwest Easy L...	SPRA00001	WD-440	
Safety Goggles	Safe-R-Us	SAFE00001		
Latex Gloves	WestCo Mfg, Co	LATE00001	LG-0085 Mens	
Leather Gloves	WestCo Mfg, Co	LEAT00001	LG-0067 Mens	

To resort the records

- Move to and click on the column header.
- To resort in the other direction, click the header again.

Moving Columns

The majority of the Lookup grids allow you to rearrange the columns found on the grids, thereby allowing you to customize the grid layout to your liking.

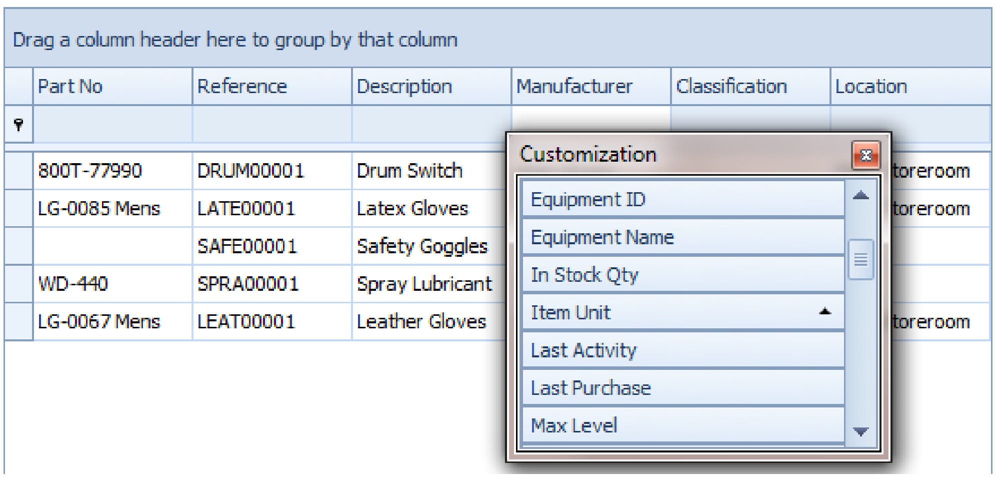


To rearrange columns:

- Just click and hold the column of your choice.
- Drag the column to its new location and release the mouse button.

Adding Columns

The majority of the Lookup grids allow you to add database columns to the grids. This is especially useful when we left out a particular column that you just must have.



To add a database column:

- Right mouse click in the column headers area to pull up a context menu.
- Click on the **Column Chooser** option.
- Double-click on the column or columns you want to add.
- Click on the **Close button** in the upper right corner when done.

Please note that some of the available fields may not display information that the average user will understand. Many of these fields are used internally by the application and are not meant to show data directly to the user.

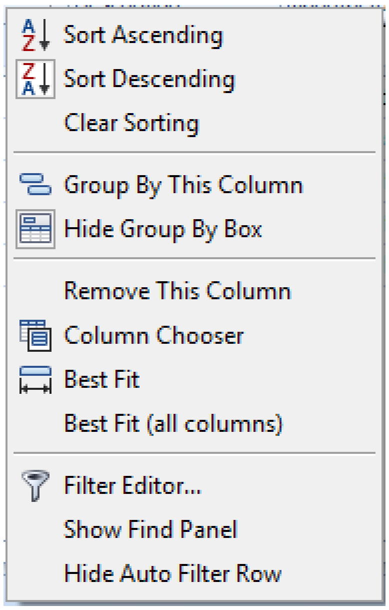
Removing Columns

Just as we allow the user to add columns to a grid, you can remove them as well. To remove a column:

- Right mouse click on the column header that you want to remove.
- Click on the **Remove this Column** option

Other Options

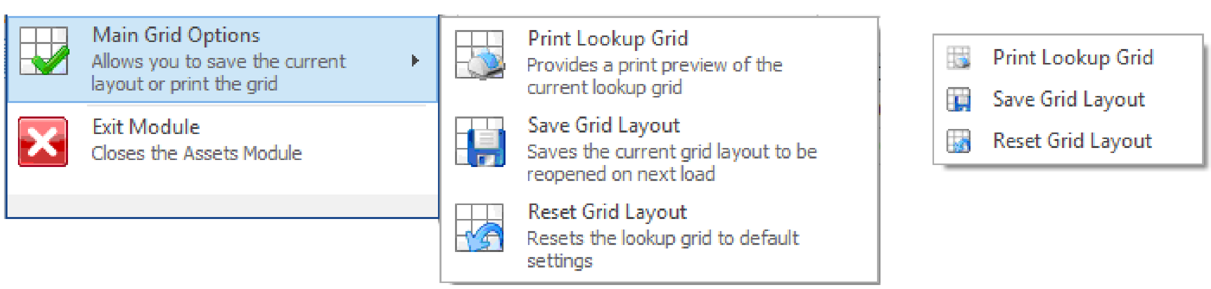
There are other options available to the Lookup Grids that the user can explore on their own. To access these options just right click within the grid's header area.



Save Grid Layouts

Most of the settings we just discussed will reset themselves when the screen is closed and reopened. The exception to this rule is found when the **Lookup** grid is saved by the user. In most cases we made this grid savable via the **File** menu. When a **File** menu is not available, you may also be able to save the grid by right mouse clicking in the rows part of the grid. This will invoke a popup menu. Once your grid is customized to your liking, save the grid and the settings so they will be reapplied when reopened.

The following illustrations shows both of the **Main Grid Options** as found in the **File** menu or the **Popup** menu attached to the lookup grid:



Accessing the Main Grid Options (when available)

To access the **Main Grid Options**:

- Move to and click on the ribbon's **File** menu.
- Click on the **Main Grid Options** button to expand the pop out sub menu. Options on this sub menu include:

- **Print Lookup Grid** – This action will invoke a print preview of the main grid.
- **Save Grid Layout** – This option saves any customization you may have applied to the grid. Once saved, these customizations will be reapplied when the module or lookup screen is next shown.
- **Reset Grid Layout** – This option will reset the grid back to the settings that was supplied by us. You will see the results of this once the module or lookup screen is next shown.

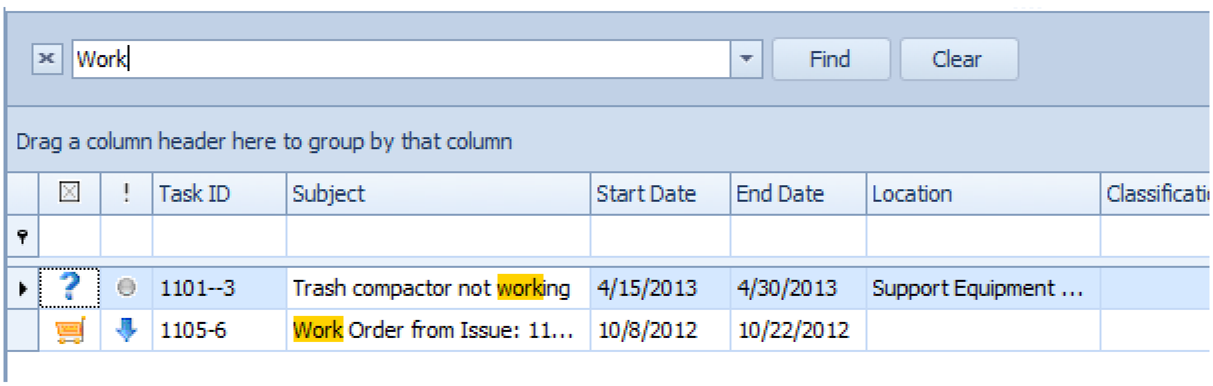
Accessing the Main Grid Options from the Popup Menu (when available)

When the **File** menu is not available, we have provided (in most cases) a popup menu that allows for the same options. To access the Main Grid options via the popup menu:

- Move to the **Lookup** grid.
- Right mouse click in the database rows part of the grid. This will invoke the popup menu. Options available here mirror those found on the **File** menu.

Searching

The built-in **Search Panel** provides an easy way of searching against multiple columns. It is displayed above the Group Panel. The Search Panel contains a search box and control buttons.



To access the Search Panel, click on the Search button in the ribbon. You can close the panel by clicking this button again or clicking the X button from within the panel. When the Search button is not available in the ribbon, you can open the Search Panel by first clicking with in the grid and then clicking CTRL+F. Clicking **ESC** - Clears the search box. If the search box is empty, pressing **ESC** closes the Search Panel.

In its simplest form, search criteria consist of a single word. To search for a string containing a space character, specify this string in quotation marks. Without quotation marks, words separated by the space character are treated as individual conditions (using the OR logical operator by default

To search against a specific column, precede a search string with the column's display name plus a colon character.

Precede a condition with "+" to select records that match this condition. Other records will be excluded from the result. The "+" specifier allows you to implement the logical AND operator.

Precede a condition with "-" to exclude records that match this condition from the result set.

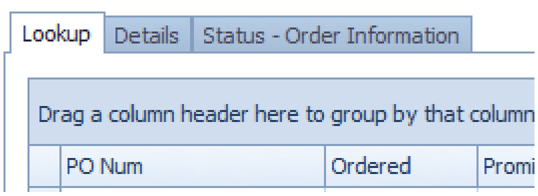
Examples:

Search Criteria	Description
register	Selects records that contain the "register" string in any search column.
check register Dave	Selects records that contain either "check" or "register" or "Dave" strings in any search column.
"check register"	Selects records that contain "check register" in any search column.
screen +"Richard Fisher"	Selects records that contain both "screen" and "Richard Fisher" in search columns.
data +entry -mark	Selects records that contain both "data" and "entry" in search columns, excluding records that contain "mark".
menu mask -file	Selects records that contain "menu" or "mask", excluding records that contain "file".

Note: Searches performed using the **Search Panel** is case insensitive.

Tab or Folder Controls

Tab or Folder Controls are used throughout the application. The main purpose of these tabs is to group information and to enable more information to fit on the screen. The following picture displays a typical Folder control with 3 tabs. These folder controls are often just referred to as tab controls.

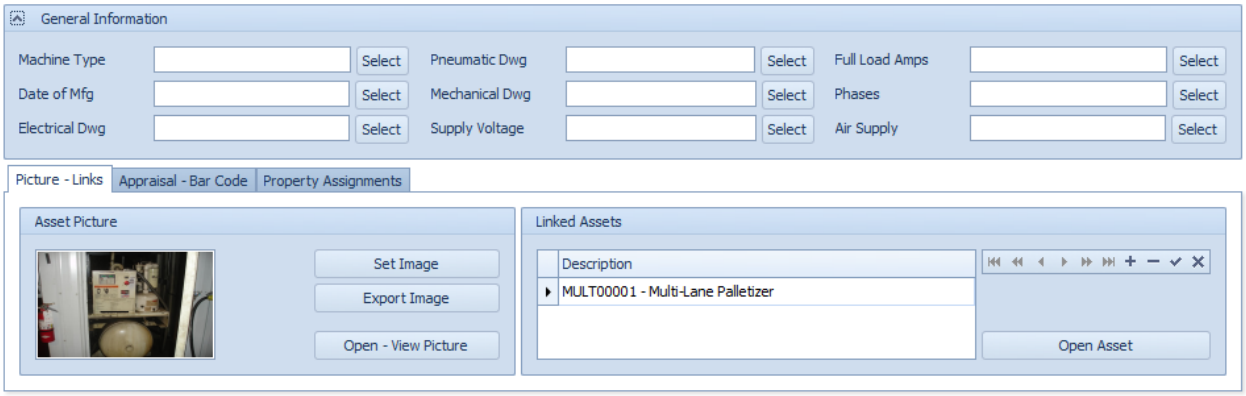


To move from one tab to another simply click on the preferred tab.

Group Controls

Group Controls are used throughout the application. Their primary purpose is to tie information together into logical groups. This grouping facilitates a better understanding of items by the end user.

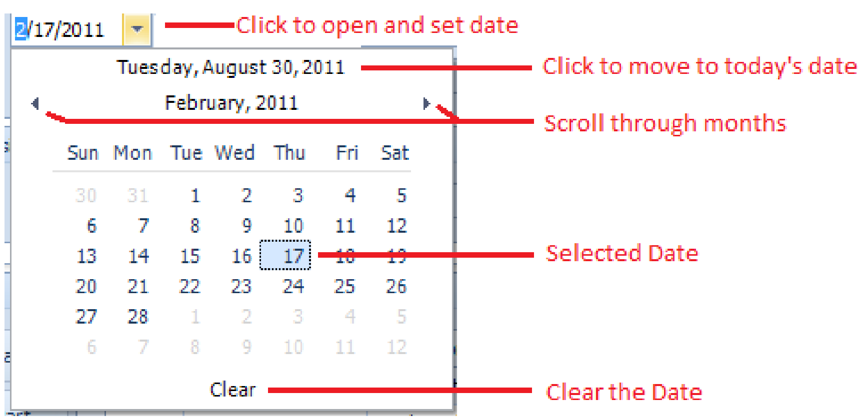
The following illustration show a typical group control along the top. The lower half of the image shows a tab control with two tabs. The active or selected tab also contains two more group controls.



Selected **Group Controls** can be opened and collapsed by the user. The controls that you can open and collapse have an arrow icon in their upper left hand corners. You just click on these arrows to open and collapse these controls.

Date Controls

Date Controls are used throughout the application for the purpose of setting or selecting dates.



To display the date control:

- Click on the Down Arrow along the right side of the control.

To select a date:

- Click on the date within the control.

To move to today's date:

- Click on today's date near the top of the control.

To scroll through the months:

- Click on the forward or back arrows within the control.

To clear the entered date:

- Click on the word **Clear** near the bottom of the control.

Editing Values, Selecting Text and Using the Clipboard

Select and Deselect Editor's Contents

To select all text within an editor, you can invoke the Editor Context Menu and choose Select All. To select a part of the edit value, click on a position where the selection should start, drag the pointer to the end position and then release the mouse button.

Additionally, the following keyboard shortcuts allow you to manage selections.

Shortcut	**Description**
CTRL+A or F2	Select all within an editor.
SHIFT+ARROW	Extends or shrinks the selection by one character.
CTRL+SHIFT+ARROW	Extends or shrinks the selection by one word.

Clipboard Operations

Clipboard operations are supported for editors that support caret moving.

To copy selected text into the clipboard, do the following.

- Press CTRL+C or CTRL+INSERT.
- Open the Editor Context Menu and select Copy.

To paste text from the clipboard, do the following.

- Press CTRL+V or SHIFT+INSERT.
- Open the Editor Context Menu and select Paste.

To cut some text from an editor into the clipboard, do the following.

- Press CTRL+X or SHIFT+DELETE.
- Open the Editor Context Menu and select Cut.

Delete Selected Text

To delete the selected text within an editor, do one of the following:

- Press DELETE or BACKSPACE.

- Open the Editor Context Menu and select Delete.

Undo

To undo the last text editing operation, do one of the following:

- Press CTRL+Z.
- Open the Editor Context Menu and select Undo.

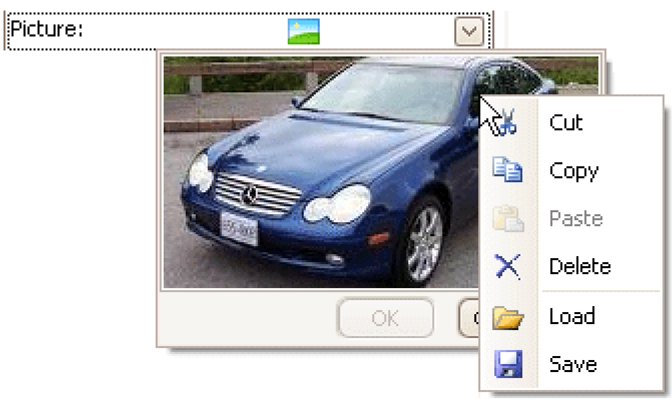
Note: After you've undone an operation, you can return to the previous edit value by executing the Undo command once again.

Change Numeric Values

To increment a value, press UP ARROW. To decrement the value, press DOWN ARROW. Or, use the mouse wheel.

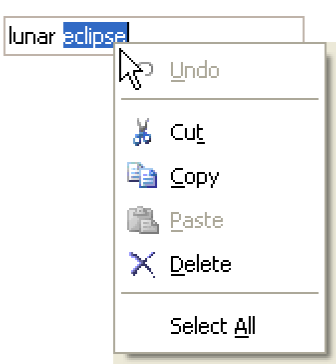
Edit Images

To copy, cut, paste, load and save images in image editors, right click the image and select the required command via the context menu:



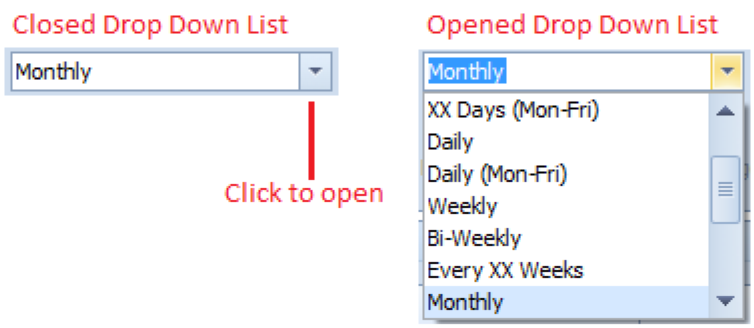
Editor Context Menu

Text editors support a context menu providing common commands. To open the menu, right-click on an editor.



Drop Down List Boxes

Used throughput the application are drop down list boxes. The purpose of these controls is to allow the user to select an item from a list of choices.



To use a drop down list box:

- Click on the down arrow on the right side of the control.
- Use the arrows on the scroll bar to move through the list.
- Once located, click on the item of your choice to use it.

Data Quick Entry

One time saving feature we have installed in most of the data input screens used by the application are what we call "*Data Quick Entry*" routines. These routines are used to store information that you would use repeatedly. The idea behind this feature is to allow you to type in commonly used information just once. The next time you need it you just call up the routines, select the text from a list, and have it automatically inserted for you.

Each text field in the application that works with these routines has their own filtered databases. For example, if you call up the listing while in the "Classification" text field, you'll get a different list of items than if you were in the "Project" field.

Using Data Quick Entry 'Drop Down' Lists

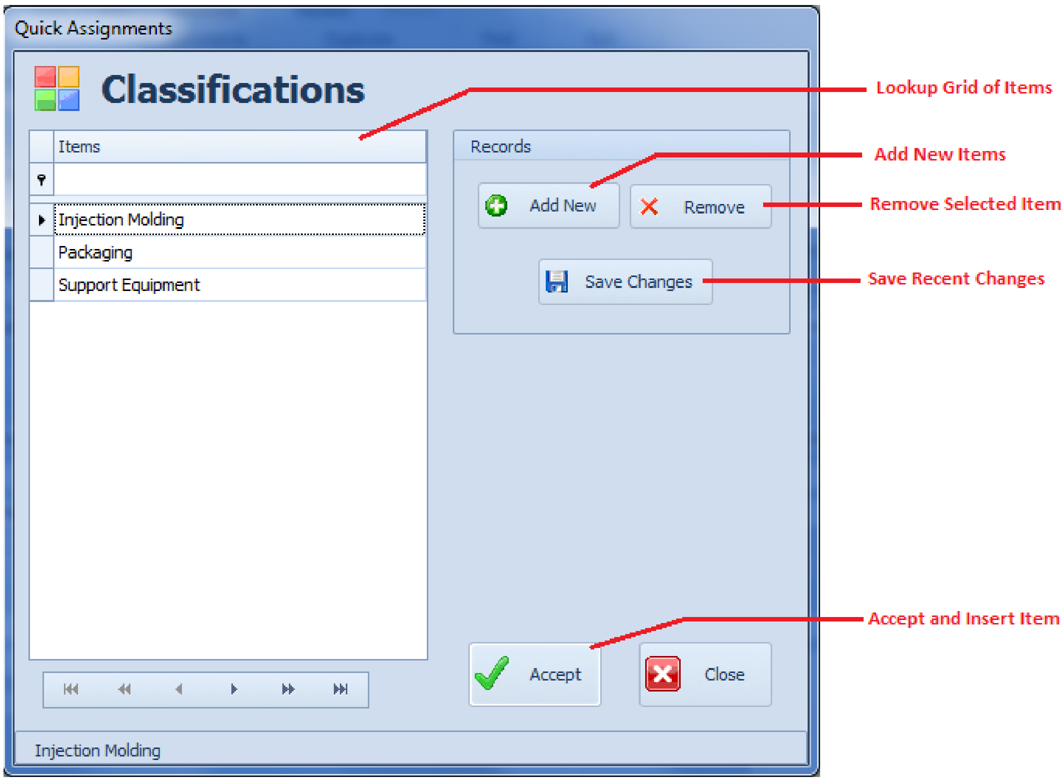
In many cases you access the items of the **Quick Data Entry** from drop down lists. When used in this way these lists are also 'Auto Complete' enabled. This is to say that as you type, the program will suggest an item that's already in the list.

You add and delete items in these drop downs by click on the **Manage** button adjacent to these fields.

Calling Up the Data Quick Entry Screen

To call up the Data Quick Entry list from one of the supported text input fields:

- Click on the ellipse (**…**) button, click on the **Manage** button or click the **Select** button adjacent to the field that you want to make an assignment to.



Adding New Quick Entry Items

Before you can begin using the Quick Entry option, you'll need to add information into the listing. Once the list has been populated the information will then be available for insertion.

To add information to the Quick Entry list, you must:

- Click on the **Add New** button.
- Type in the information you want included in the listing. This text can be any combination of text characters and numbers and have a maximum length of 30 characters.
- Press or click on the **OK** button to accept the text and add it to the list.
- Click on the **Save Changes** button to save your changes.

Selecting Text for Insertion

Once you have information installed into the Quick Entry listing, you can use and reuse this text any countless number of times.

The procedure for selecting text from the Quick Entry list and inserting it into the appropriate field:

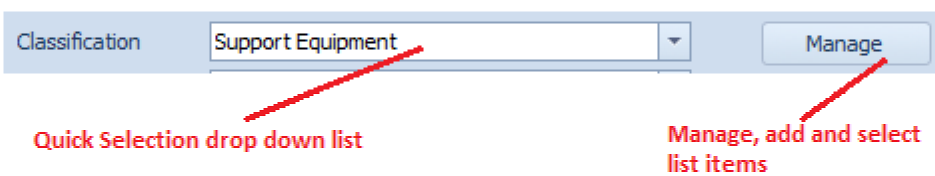
- Click on the ellipse (**…**) button, click on the **Manage** button or click the **Select** button adjacent to the field that you want to make an assignment to.
- Move to the **lookup grid** and click on the selection of your choice.
- Click on the **Accept** button.

Deleting Item from the Quick Entry List

If you have information in the Quick Entry list box that you no longer feel is valid; you can delete it by following these steps:

- Click on the ellipse (**…**) button, click on the **Manage** button or click the **Select** button adjacent to the field that contains the list you want to edit.
- Move to the **lookup grid** and click on the selection of your choice.
- Click on the **Remove** button.
- When prompted if you want to continue, click **YES**.
- Click on the **Save Changes** button to save your changes.

Data Quick Entry: Drop-Down Lists



Many of the quick entry routines are also have a drop down list box associated with it. In this case you would just select an item from within the list. This list also employs an auto complete feature where the program will try to bring up the item you need as you type in the edit area of the drop down.

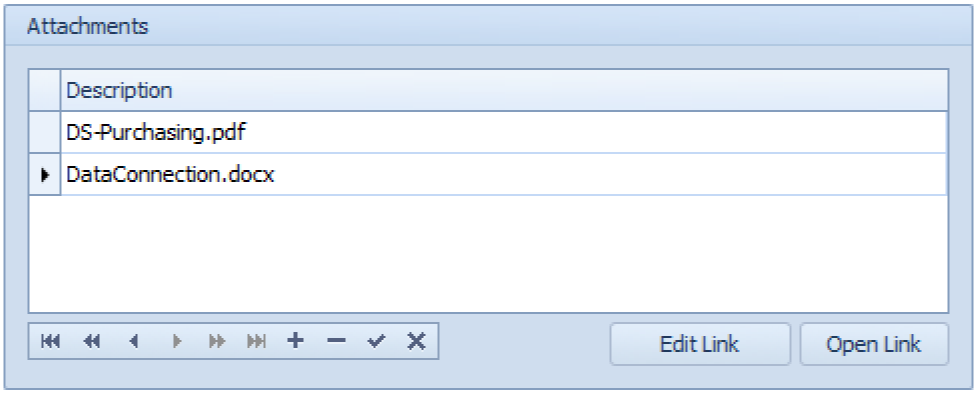
If the item you want is not within the list, you can click on the **Manage** button adjacent to the entry field to add the item as described in the previous section.

Attachments

Many of the modules within the system use the **Attachments Feature**. This feature allows you to attach items to various records such as work orders, equipment records, employee records and more.

Basically any type of document or path that can be accessed through the Windows' *Start – Run* option can be used as an attachment. Normally you just point to a file, and when opened that file will open itself within with the appropriate or associated application. These can include, but not limited to pictures, CAD drawings, documents, web-sites and more.

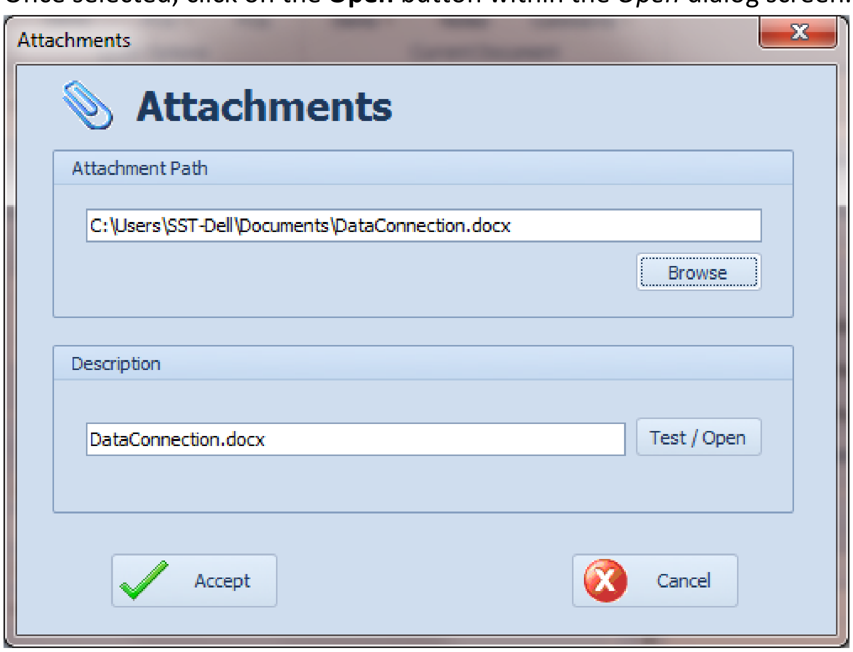
When using pictures, we highly recommend using this feature as opposed to importing them into the database. Picture or image files can use a lot of database space in a short amount of time. This could both consume database space and effect database performance. Links to image files on the other hand use very little space, and actually provide better support.



The image provided is what the Attachment feature typically looks like. This appearance can change somewhat from module to module, but in general it has the same general look and features no matter where used.

To add an attachment

- Locate and select the record you want to add an *attachment* to.
- Move to the **Attachment** section and click on the plus sign (**+**) in the data control located in this section.
- From the invoked *Attachments* dialog, use the **Browse** button to search and select the file or document you want use as an attachment.
- Once selected, click on the **Open** button within the *Open* dialog screen.



- If the default description for this file is not descriptive enough, then move to the **Description** text box in the **Description** group and edit its contents.

- To test if the link actually works, click on the **Test/Open** button.
- To accept everything and use the attachment click on the **Accept** button.

To open and view an attachment

- Move to the grid and click on the attachment you want to open.
- Click on the **Open Link** button.

To delete an attachment

- Move to the grid and click on the attachment you want to delete.
- Move to the data control and click on the remove (**-**) button.
- Click '**Yes**' to the deletion prompt.
- Click the '**End Edit**' or **Post** button in the data control (check).

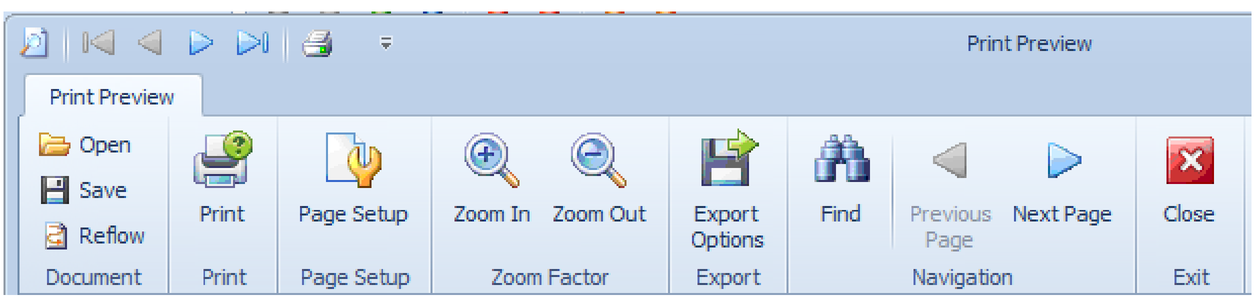
Using Attachments on More Than One Computer

When using attachments with more than one computer, say with a Network configuration for example, we suggest using mapped drives. Using a mapped drive will allow you to create the same path for each PC in use. If this is not done the path could change from computer to computer and the attachment will not always be found. For more information on mapped drives, search Windows help from My Computer.

Print Preview

Just about every module in the system will output some form of a printed document. Sometimes these documents can go straight to the default printer, but in almost every case you have the option to Preview the documents before actually printing them. The application actually makes use of few different preview screens, the most common one of these will be outlined here.

The following elements are found on the Print Preview ribbon control:



QUICK ACCESS TOOLBAR

- The first arrow control moves to the first page of the document.
- The second arrow control moves to the previous page.
- The third arrow moves to the next page of the document.
- The fourth arrow moves directly to the last page of the document.
- The printer icon prints the document.

PRINT PREVIEW TAB

- **Open** – Opens a document that was saved to file.
- **Save** – Saves the current document to file.
- **Reflow** – Redraws the document to screen.
- **Print** – Allows you to select the printer to use, and other options prior to printing.
- **Page Setup** – Allows you to setup the documents margins, origination and paper types.
- **Zoom In** – When clicked, zooms in on the present document.
- **Zoom Out** – When clicked, zooms out on the present document.
- **Export Options** – Works in the same way as the **Save** option above.
- **Find** – Allows you to search the document for matching text.
- **Previous Page** – Moves backwards through the document, one page per click.
- **Next Page** – Move forwards through the document, one page per click.
- **Close** – Close and exit the Preview Screen.

Open Document

To open a save document:

- Click on the **Open** option in the ribbon.
- Use the File Open Dialog as explained by the current operating system.
- With the file selected, click the **Open** button. The following file types are supported: c1dx, c1d, c1db and c1mdx.

Save or Export Document

To save or export a document

- Open the **File** menu.
- Click on the **Save** or **Export Options** buttons in the ribbon.
- Use the *Save As Dialog* as explained by the current operating system.
- Enter a name for your file in the **File Name** area and click the **Save** button.

The following export formats are supported: Proprietary formats (c1dx, c1d, c1db, and c1mdx), pdf, xlsx, xls, rtf, docx, htm, emf, tiff, png, jpg, gif, bmp and xps.

Print Document

To print the document:

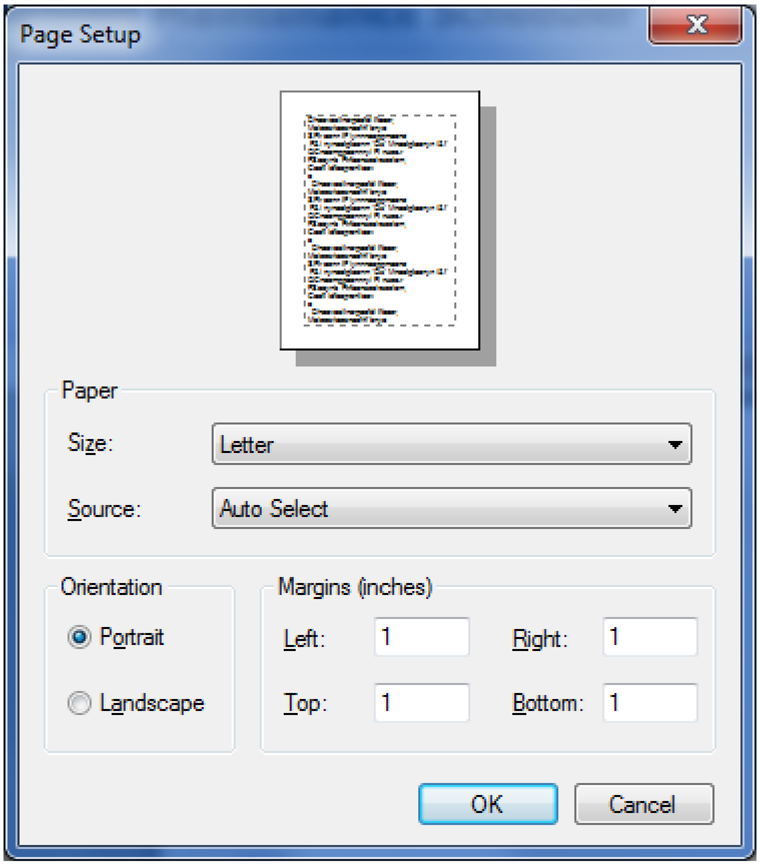
- Click the **Printer** icon in the quick access toolbar or click on the **Print** option in the ribbon.
- From the *Print* setup the print options to your liking.
- Click the **OK** button.

Page Setup

The page setup allows you to setup the paper size, source, orientation and page margins.

To setup the current document:

- Click on the **Page Setup** button in the ribbon.
- Setup the options on the *Page Setup* dialog to your liking.
- Click on the **OK** button.



Searching the Document

You can search the document for matching text by:

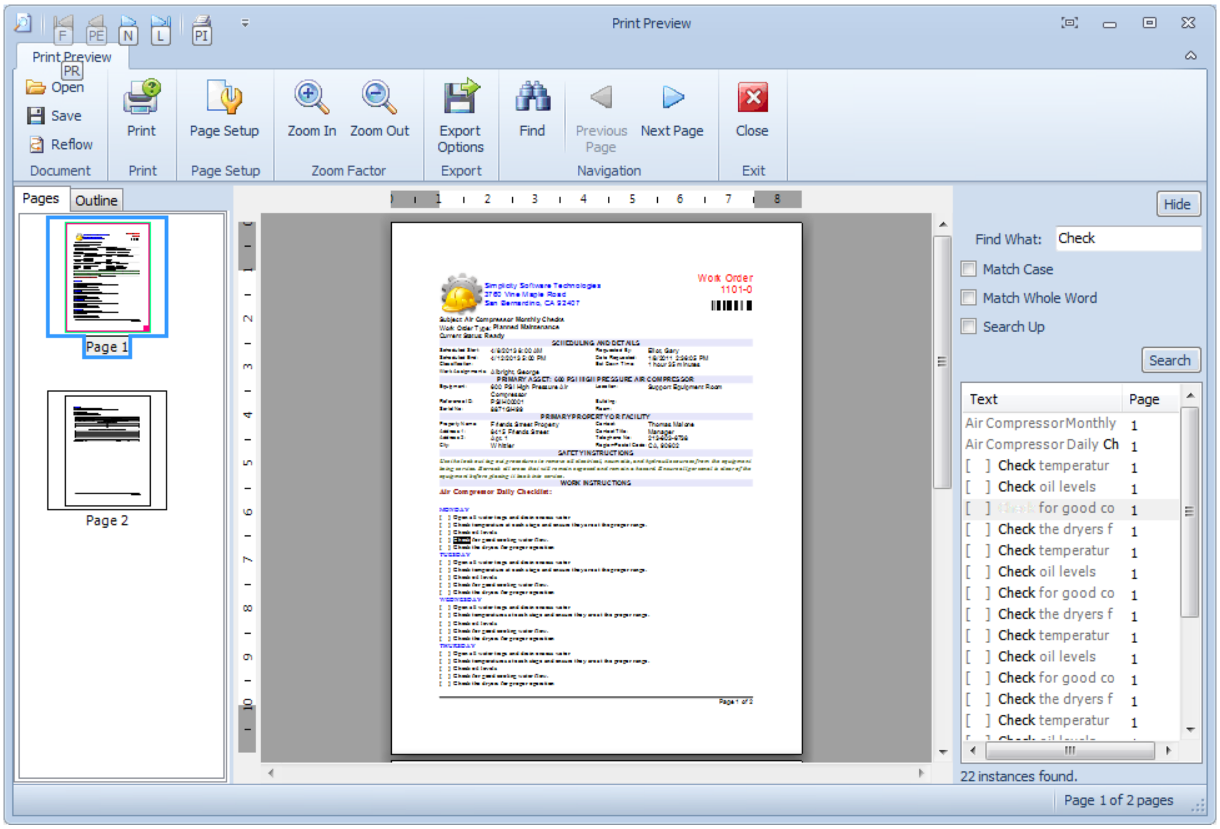
- Move to and click on the **Find** button in the ribbon. This will cause a search dialog to be displayed on the right hand side of the *Preview* screen.
- Move to the **Find What** text box, and type in the text to search for.
- Place a checkmark in the options you want to apply to your search:
  - Match Case
  - Match Whole Word
  - Search Up
- Click on the **Search** button.

To highlight the text that was found, from within the list:

- Click on the item found from the displayed list.

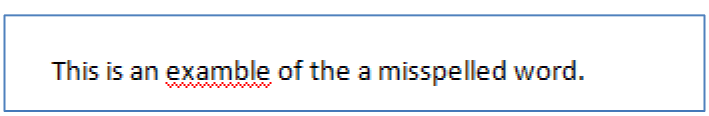
To close the search panel:

- Click on the **Hide** button.



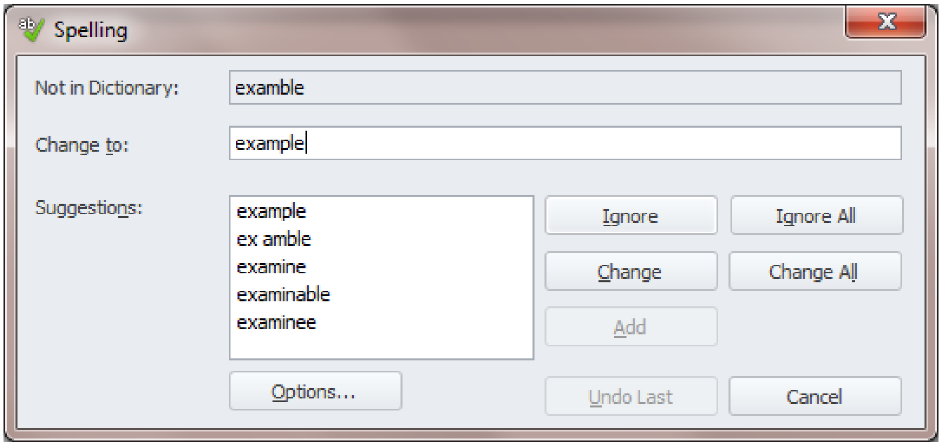
Spell Checker

The Spell Checker can be found in the majority of the major editors used by the system. This includes such editors as the Rich Text Editor, Text Editor, Tasks Editor and the Email Composer.



When the Spell Checker component finds a word that is not contained in the dictionaries associated with the current culture, the **Spelling** dialog can be used for making corrections. This dialog is invoked when a spell check is started on demand (for example, when the end-user clicks a button, or the Check Spelling item is selected from the context menu, displayed when the end-user right-clicks the incorrect word.

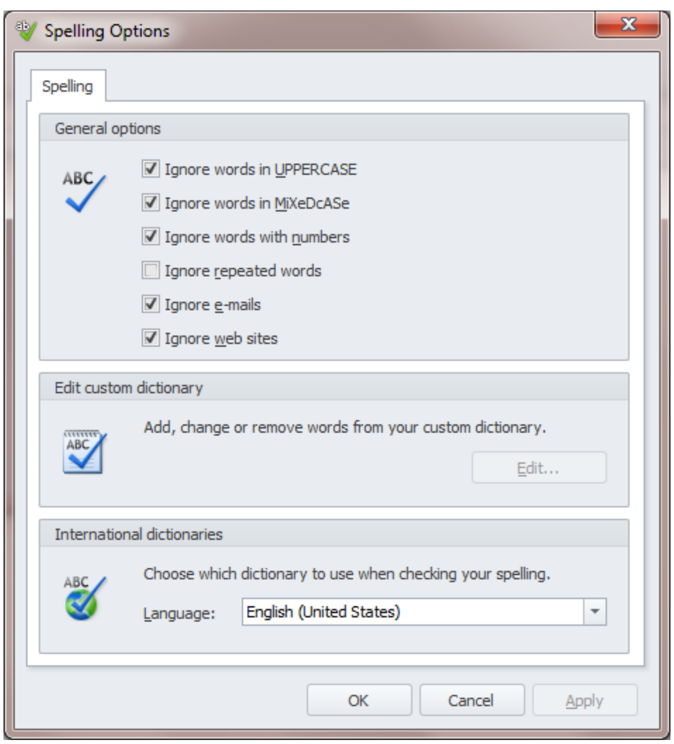
Spell Checker Dialog



This dialog enables the end-user to do one of the following:

- Select one of the suggested corrections to replace the misspelled word (once or all occurrences in the text)
- Skip the word (Ignore)
- Ignore the word and all its future occurrences in the text.
- Add the word to a custom dictionary of the Spell Checker (when available).

The Options... button invokes the Spelling Options Dialog. The Undo button allows cancelling changes, step by step.



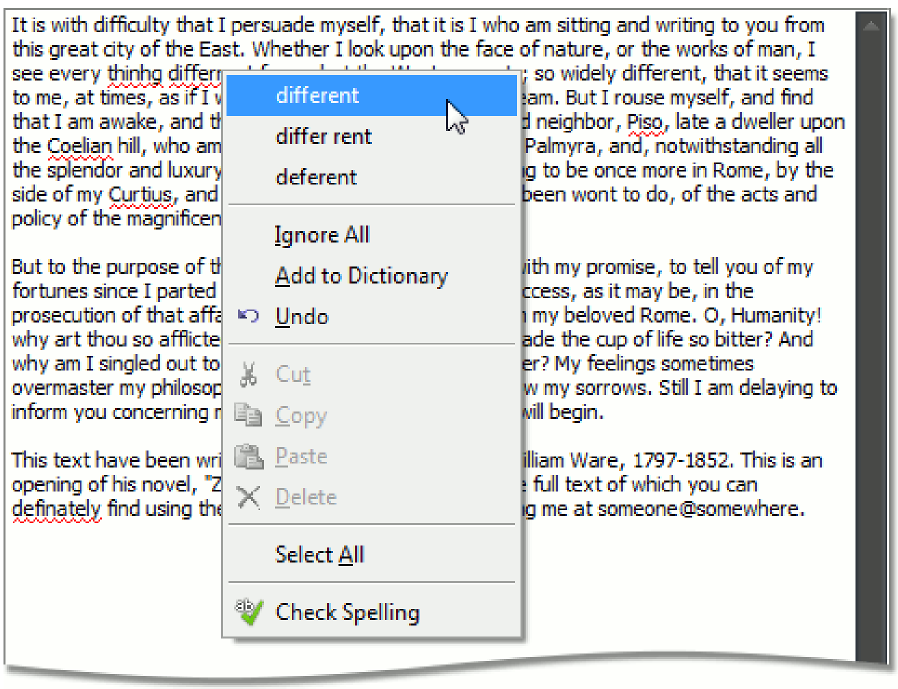
Finding Misspelled Words as you Type

With some of the editors, misspelled words will be highlighted from within the editor itself. Misspelled or unrecognized words will have a wavy red underline below them. When supported, you can right-click over these words to invoke a popup menu.

From this popup you can:

- Replace the word with one of the supplied suggestions.
- Ignore All word with the same misspelling.
- Add the Word to the Dictionary.
- Or invoke the Spell Check Dialog

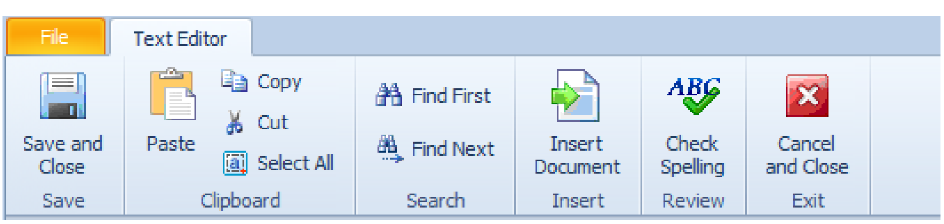
The popup may also show other, non-spell checking related options.



Text Editor

The Text Editor has been installed throughout the system where the user may need to create or edit large amounts of text.

The following elements are found on the **Text Editor** tab, reading left to right:



- **Save and Close** – Saves the current text back to the call-up control and closes the editor.
- **Paste** – Inserts any clipboard text into the document, and at the current cursor location.
- **Copy** – Copies selected text and places it into the clipboard.
- **Cut** – Deletes selected text and places it into the clipboard.
- **Select All**– Selects all the text in the document.
- **Find** – Helps to find matching text.
- **Find Next** – Helps to find the next match.
- **Insert Document** – Inserts a text document saved to file.
- **Check Spelling** – Reviews the document checking for spelling errors.
- **Cancel and Close** – Closes the editor without applying any changes.

Insert Document

The Insert Document feature works much like the Open Document feature. However, instead of replacing the current document, it inserts it at the current cursor location.

To insert a text document:

- Click in the document where you would like the insertion to occur.
- Click on the **Insert Document** button in the ribbon.
- Use the File Open Dialog as explained by the current operating system.
- With the file selected, click the Open button.

Open Document

If wanted, you can create your text documents in other applications such as Windows Notepad, save the file as a text file, and then import it here.

To import a text file, replacing any currently loaded document:

- Open the **File** menu.
- Click the **Open Document** option.
- Use the *File Open Dialog* as explained by the current operating system.
- With the file selected, click the **Open** button.

Save Document

If wanted you can write text documents using this editor and then save this document to file.

- Open the **File** menu..
- Click the **Save Document** option.
- Use the *Save As Dialog* as explained by the current operating system.
- Enter a name for your file in the **File Name** area and click the **Save** button.

Print Preview the Text Document

To print preview the loaded document:

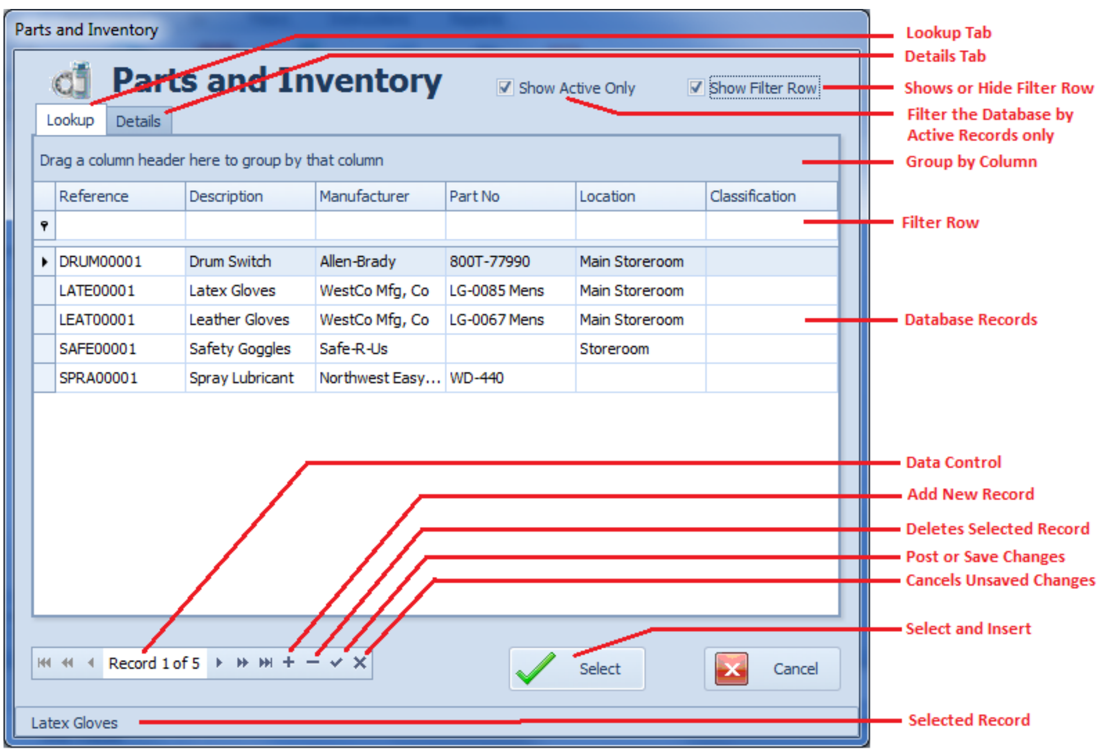
- Open the **File** menu.
- Click the **Print Preview** option.

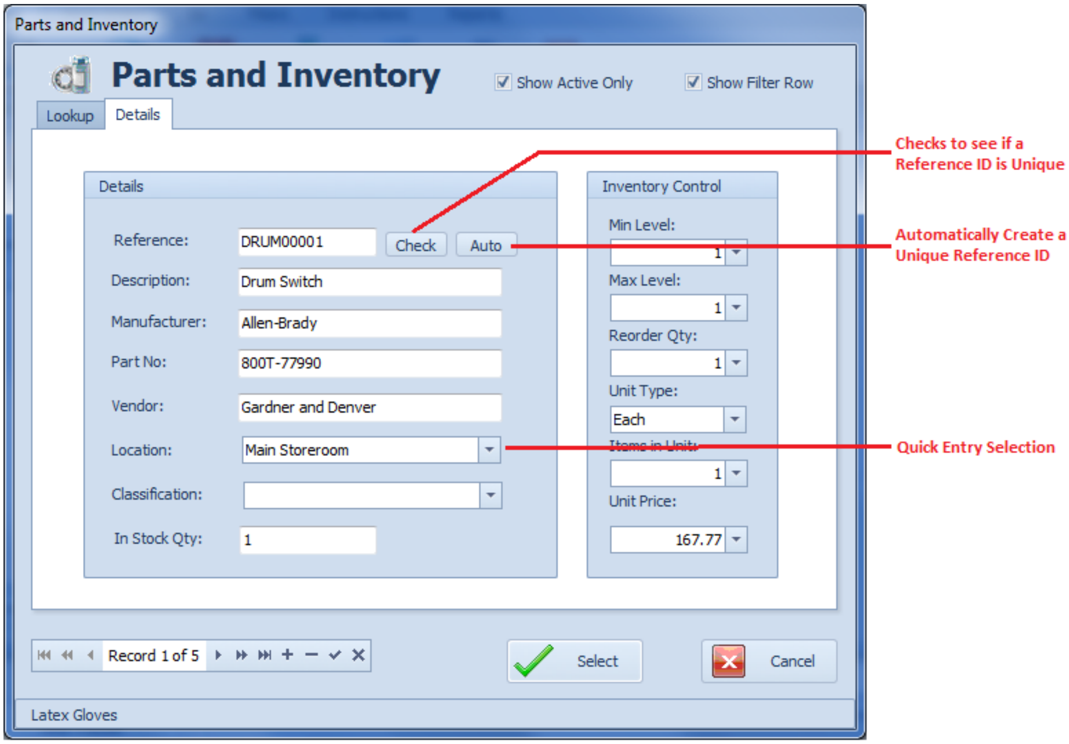
Lookup Dialog Screens

There are many *Lookup Dialog screens* used by the application that were designed for lookup and assignment purposes. As these lookups may represent information from different database tables, we have tried to design them so they will function in a similar manner regardless of what information or table is being presented.

Also be aware, that not all the functionality of these lookups will always be available to the user. Options can be hidden or disabled by a user's assigned rights and from where these looks are being activated from.

The following images outline the common elements of most *Lookup Dialogs*. The provided illustration shows the *Parts and Inventory* lookup dialog, but the same general features are available to the *Equipment and Assets, Vendor and Contacts, Mechanics and Employees*, and other *Lookup dialogs* screens found in the system.





Again, we want to emphasize that depending on the rights being assigned at the time, there will be many occasions where these *Lookup Dialogs* will function as '*Lookup Only'* type dialogs where the controls on the Details tab will be disabled or even invisible. At other times you may be allowed to add and edit the information without restrictions.

To select a record for insertion or assignment:

- From the *Lookup Dialog*, move to the **Lookup** tab.
- To view all currently active records, ensure that the **Show Active Only** checkbox is checked. To view all records uncheck this checkbox.
- If you know a value of one of the fields, you can move to the **Filter Row** of the column you want to filter by.
- Typing in the **Filter Row** will filter the grid with the criteria you typed in.
- You can also scroll through the records until the one you want is located and selected.
- Once you find the record you're looking for, move to and click on the **Select** button.

To add a new record using the Lookup Dialog:

- Move to the **Data Control** and if available click on the plus sign (**+**) in the control.
- Move to and click on the **Details** tab.
- Move to the various fields on this tab and edit the information found there.
- Chick on the check (**post**) button in the data control to save your changes.

To edit a record (when available):

- Move to the **Lookup** tab.
- Located and select the record you want to edit from those listed.
- Move to the various fields on this tab and edit the information found there.
- Chick on the check (**post**) button in the data control to save your changes.

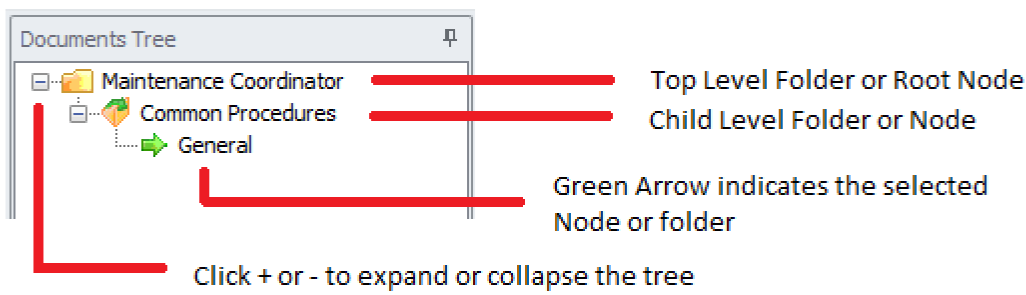
To delete a record (when available):

- Move to the **Lookup** tab.
- Located and select the record you want to delete from those listed.
- Click in the **minus sign** (**-**) button on the data control,
- Chick on the check (**post**) button in the data control to save your changes

Documents Trees

The *Documents Tree* is used through-out the system, and its features are duplicated in each place it is used. Examples of areas it can be found is in the *Documents Features* found in many of the modules, the *Procedures and Solutions* module, and the *Repair Procedures Editor* used with work order instructions.

Understanding and Using the Documents Tree



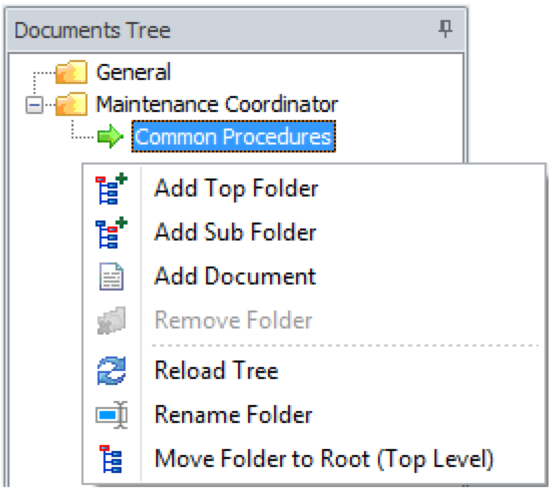
The **Documents Tree** allows for the organization of your documents in **Folders** or nodes. Basically you are not limited to the number of folders you can create and use. You can also create as many levels of these folders as maybe needed (parent – child folders). The supplied illustration shows the elements of a typical tree control.

IMPORTANT NOTE: Most of the procedures outlined in this section refer to the use of pop-up menus, however many of these procedures can also be duplicated and be found in the ribbon control as well.

Create a Document Folder

Each document in the system will be assigned to a folder or tree node in the **Documents Tree**. Once a folder is created documents can be added to it.

To create a new Document "Root" or "Top Level" folder:



- **Right mouse clicking** within a **Documents Tree** section will invoke a popup menu.
- Click on the **Add Top Folder** option.
- From the invoked dialog enter the name you want to use for this folder and click **OK.**

To create a new "Sub Folder" or "Child Node"

- Move to the **Documents Tree** and click and select the folder that you want to add a new sub folder to.
- **Right mouse click** within the **Documents Tree** section to invoke a popup menu.
- Click on the **Add Sub Folder** option.
- From the invoked dialog enter the name you want to use for this folder and click **OK.**

To Remove a Folder

- Move to the **Documents Tree** and click on the folder you want to remove.
- Ensure there are no child folders or documents assigned to this folder. If there are items then either move and reassign these items or delete them. *You cannot remove a folder if anything is assigned to it.*
- **Right mouse click** on the folder you want to remove to invoke a popup menu.
- Click on the **Remove Folder** option.

To Rename a Folder

- Move to the **Documents Tree** and click on the folder you want to rename.
- **Right mouse click** on the folder you want to remove to invoke a popup menu.
- Click on the **Rename Folder** option.
- From the invoked dialog edit the folder name to the way you want it and then click **OK**.

To move a Folder to the Top Level or Root position

- Move to the **Documents Tree** and click on the folder you want to move.
- **Right mouse click** on the folder you want to move to invoke a popup menu.

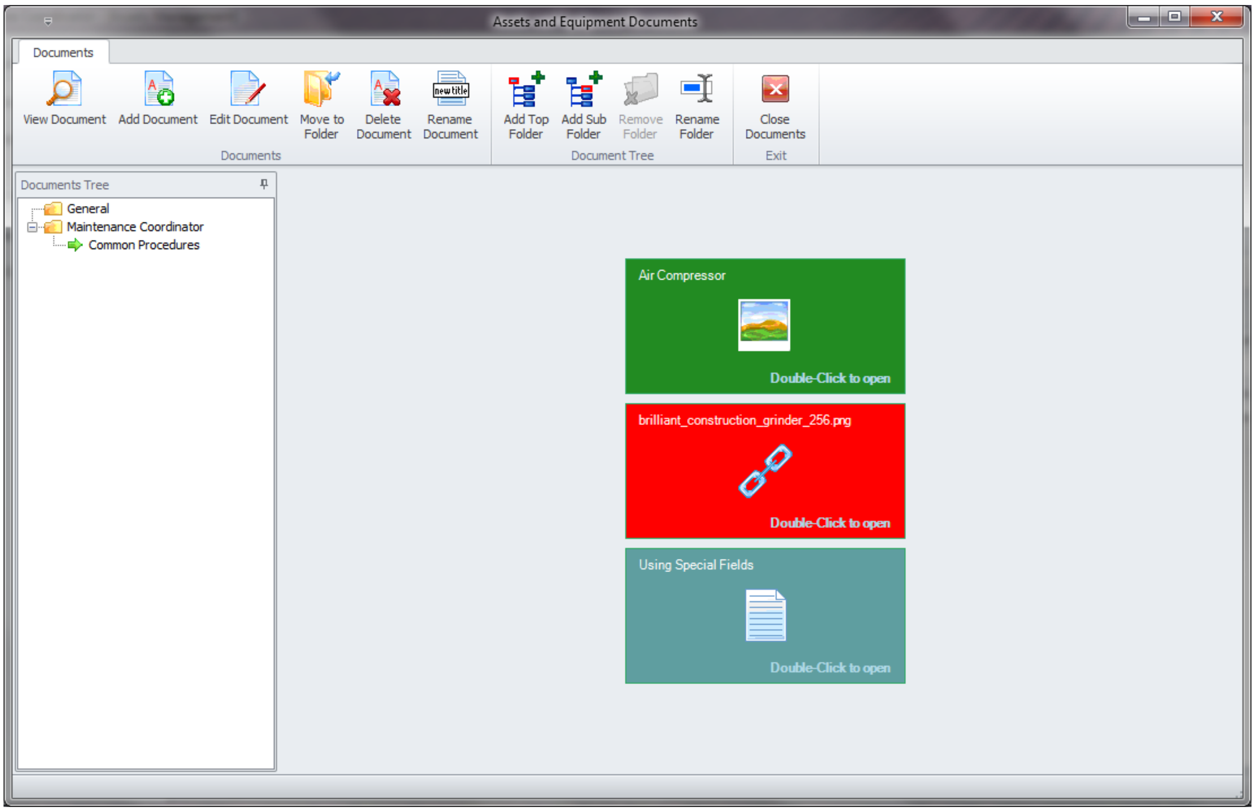
- Click on the **Move Folder to Root (Top Level)** option.

To move a Folder and Reassign its position in the tree

- Move to the **Documents Tree** and click on the folder you want to move.
- **Left mouse click** and hold on the folder you want to move.
- **Drag** the folder over the folder you want to move it to.
- Release the mouse button to **drop** the folder in to its new location.

Maintenance Documents

Any maintenance operation is sure to accumulate a wide variety of documents. Examples of these documents could be warranty information, information about your equipment, notes about your mechanics, MSDS and the list goes on and on. These documents can also be proven to be very important to the day-to-day operation of your maintenance department. For these reasons we have included the **Documents Database** feature.



The **Documents Database** is included in many of our modules where we felt it would be useful. You can find this feature in the **Maintenance Scheduler**, **Equipment module, Purchasing module, Contacts** module, and **HR** module. The **HR** module differs from the others as it's attached to each individual record. This allows you to maintain various documents on a single employee.

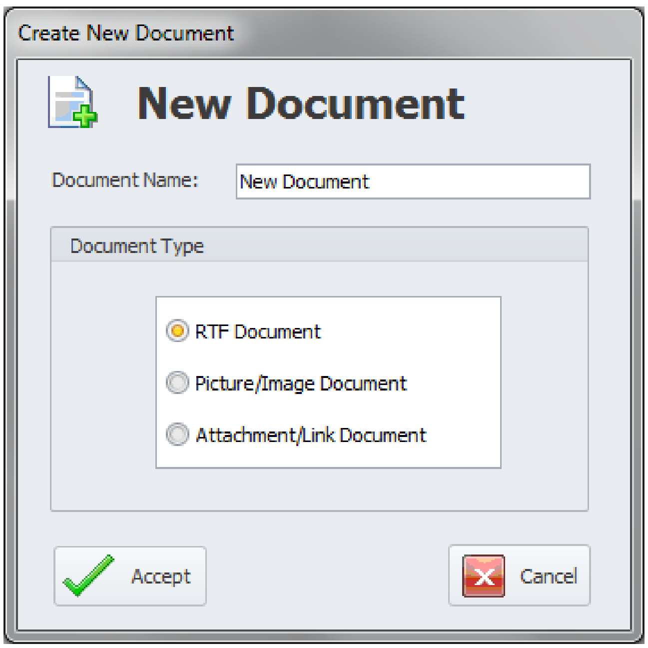
You can create three different types of documents with this feature. One is a picture document, which can be in the GIF, JPG, BMP, PNG, TIF and ICO formats. The next type of documents can be the rich-text editor type. These editor type documents features the use of our built-in Rich Text Editor. This editor supports many professional features such as multiple fonts, colors, paragraph formatting, the use of tables and more. Documents created in our Rich Text Editor are compatible with almost all windows based word processors such as Word and Word Perfect or any that support the RTF format.

The third type of available documents is the Attachments type of documents. Attachments point to other files store on hard drives, or other locations such as web-sites or folders. We recommend that you use this document type for pictures too. You can point to a picture stored on a hard drive as opposed to storing it directly in the database. This saves database space and improves database performance by keeping the database at a reasonable size.

Working with Documents

There are three types of documents that can be used by this feature. Build-in Rich-Text Editor types, Image or picture types and links to external documents. Each document must be assigned to a folder to either create or use them.

To create a new Internal Rich-Text document



- Move to the **Documents Tree** and select the folder that you want to assign the new document to.
- Click on the **Add Document** option in the ribbon control
- From the invoked **Create New Document** dialog, move to the **Document Name** text box and enter a name for your new document. This title can contain up to 30 characters.
- Move to the **Document Type** section and select the **RTF Document** option.
- Click on the **Accept** button and the Rich-Text editor will open with your new document ready for editing.

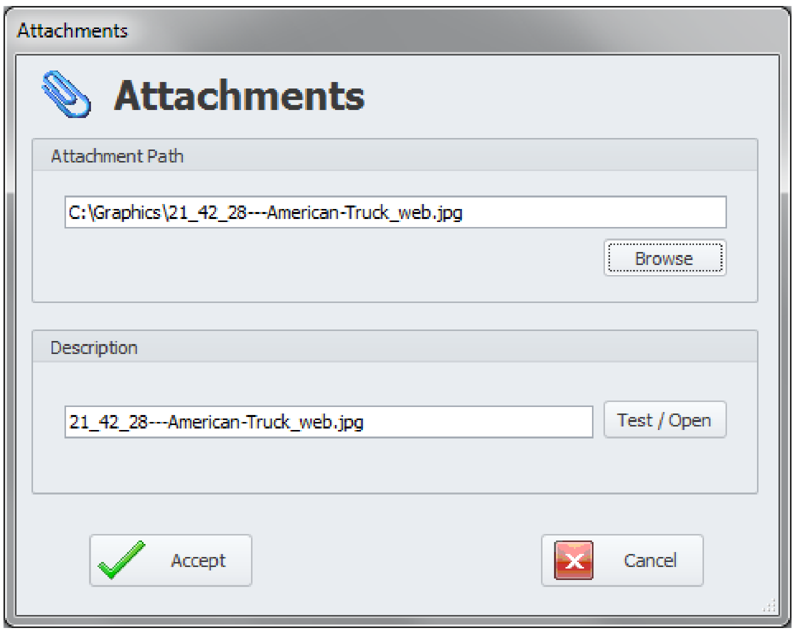
To create a new Picture/Image document

- Move to the **Documents Tree** and select the folder that you want to assign the new document to.
- Click on the **Add Document** option in the ribbon control

- From the invoked **Create New Document** dialog, move to the **Document Name** text box and enter a name for your new document. This title can contain up to 30 characters.
- Move to the **Document Type** section and select the **Picture/Image Document** option
- Click the **Accept Button** to invoke a file open dialog box.
- Browse to where the images file is store and select the image by clicking on it.
- Click on the **Open** button to assign the image.

To create a new Link document

- Move to the **Documents Tree** and select the folder that you want to assign the new document to.
- Click on the **Add Document** option in the ribbon control.
- From the invoked **Create New Document** dialog, move to the **Document Name** text box and enter a name for your new document.
- Move to the **Document Type** section and select the **Attachment/Link Document** option
- Click the **Accept Button** to invoke the Link Setup dialog.

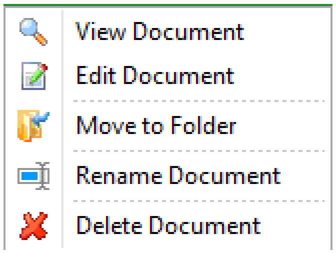


- Move to the **Attachment Path** section and click on the **Browse** button.
- Navigate to where the file you want to use is stored. Select the file and click **Open.**
- The program will ask if you want to replace the current description with one based on the file's name. To accept the new description reply by clicking on the **OK** button.
- You can edit the document's description by editing the text in the **Description** section.
- You can test the link by clicking on the **Test/Open** button.
- When everything is set to your liking, click on the **Accept** button.

To open or view a document

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.

- To open the document:
  - **Right click** on the document to invoke a pop up menu. Select the **View Document** option. Or…
  - **Double click** on the document to open it.

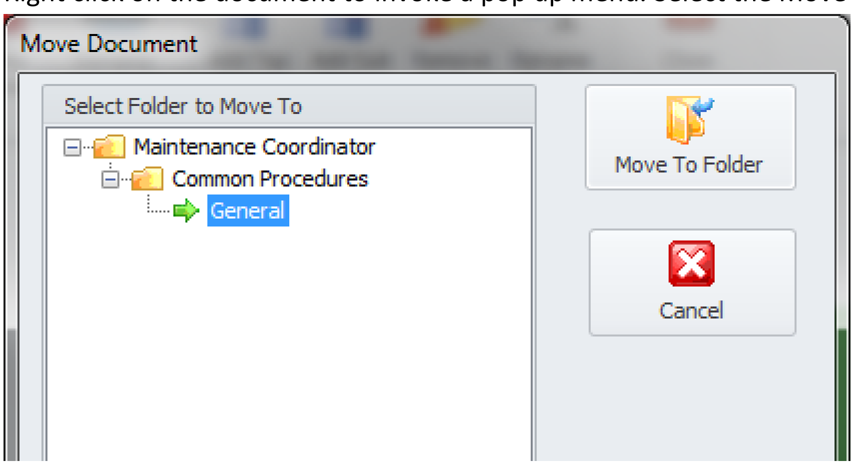


To edit a document

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- **Right click** on the document to invoke a pop up menu. Select the **Edit Document** option.
- For the Rich-Text type documents the document will be displayed in the **Editor**. For the other two document types you will edit a document's properties in the same manner it was created.

To move or reassign a document to different parent folder

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- Right click on the document to invoke a pop up menu. Select the Move to Folder option.



- From the **Move Document** dialog move and select the **folder** you want to move the document to from the displayed tree.
- Once the **Folder** is selected click on the **Move to Folder** button.

To rename a document

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- **Right click** on the document to invoke a pop up menu. Select the **Rename Document** option.
- From the **Rename Document** dialog edit or rename the document's title in the space provided.

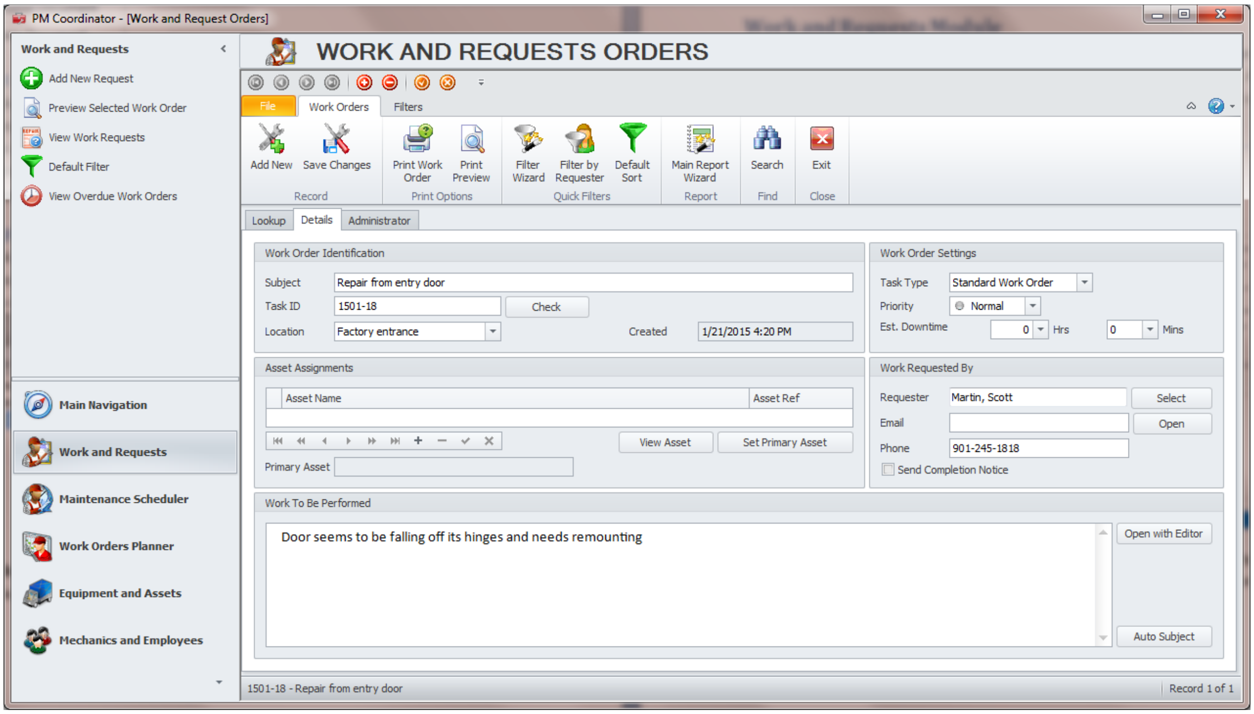
- Click **OK** to apply the changes.

To delete a document

- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- **Right click** on the document to invoke a pop up menu. Select the **Delete Document** option.
- When prompted about deleting the document, click the **Yes** button.

Work and Requests Module

This module was primarily designed for use as a '**Work Requests**' module where the users only needs to fill out the information on a single page in the creation of new work requests. As this is already considered a very simple process, you can also use a **Work Order Wizard** that simplifies the process even further.



This module is designed for use with standard work orders, which includes 6 types with user definable titles, and one fixed, Standard Work Order type. We believe you'll find this module much easier to use for these types of work orders than the **Maintenance Scheduler** module. With that said however, the system power users, or administrators would normally want to use **the Maintenance Scheduler** module. The **Maintenance Scheduler** module can handle all work order types available and provides many additional features over this module, and overall is considered more powerful.

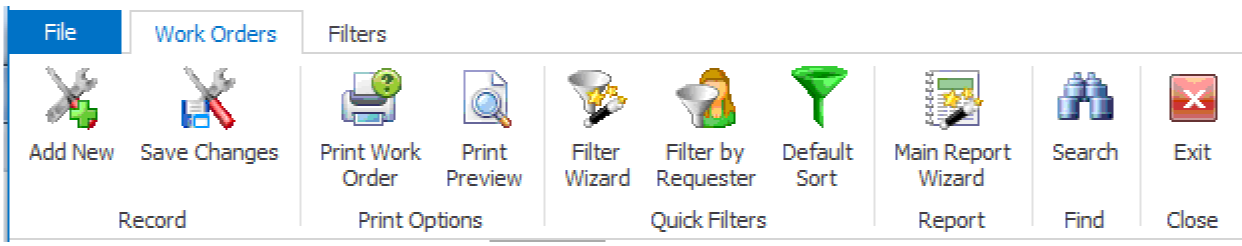
You also want to use the **Maintenance Scheduler** module to add items, such as Classification assignments, Projects and the like to the database for use with both of these modules. You can setup and customize the work order print settings with the **Maintenance Scheduler** module, along with the custom user defined titles.

All works orders when first created are assigned a status of *Work Requests*. Your system coordinator needs to only sort the database by this status to quickly find all work requests. He can then perform whatever action he wants with these tasks.

Ribbon Control

The comprehensive functionality of the *Work and Request* module is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

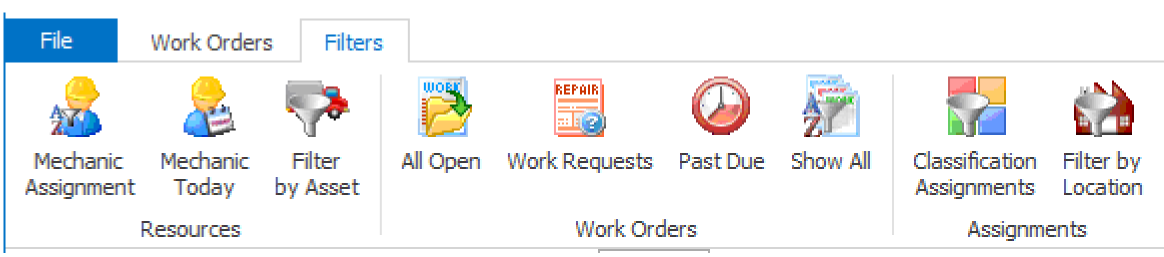
WORK ORDERS TAB



The following are the elements on the **Work Orders** ribbon tab, reading left to right:

- **Add New** – Creates a new work order document through the use of a wizard, or directly on screen.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Print Work Order** – Allows selecting a printer, number of copies, etc. prior printing the current work order.
- **Print Preview** – Provides a print preview for the selected work order.
- **Filter Wizard** - Launches the **Custom Filter Wizard** dialog that allows specific criteria to be setup to filter the database by. Please refer ***Main Report – Filter Wizard*** section in this chapter.
- **Filter by Requester** - Filters the database by a selectable, assigned employee as it applies to Requester's field.
- **Default Filter** – Re-filters the database by default values (all open).
- **Main Report Wizard** - This report uses a Wizard that allows the user to setup the criteria to use for the report creation. Please refer ***Main Report – Filter Wizard*** section in this chapter.
- **Search -** Invokes the search/find routine on the Lookup Grid.

FILTERS TAB



The following are the element of the **Filters** ribbon tab, reading left to right:

- **Mechanic Assignment** - Filters the database by a selectable, assigned mechanic or employee.
- **Mechanic Today** - Filters the database by a selectable, assigned employee with work orders with a scheduled start date of today.

- **Asset** - Filters the database by a selectable, assigned asset.
- **All Open –** Filters the database by all work orders that do not have a status of 'Completed'.
- **Work Requests** – Filters the database to view only those records with a status of Work Request.
- **Past Due** – Filters the database by all records with a scheduled completion date prior to today, and a status of still being open.
- **Show All**- Shows all work orders regardless of status.
- **Classifications Assignments –** Filters the database by a selectable, assigned classification.
- **Filter by Location –** Filters the database by a selectable, assigned location.

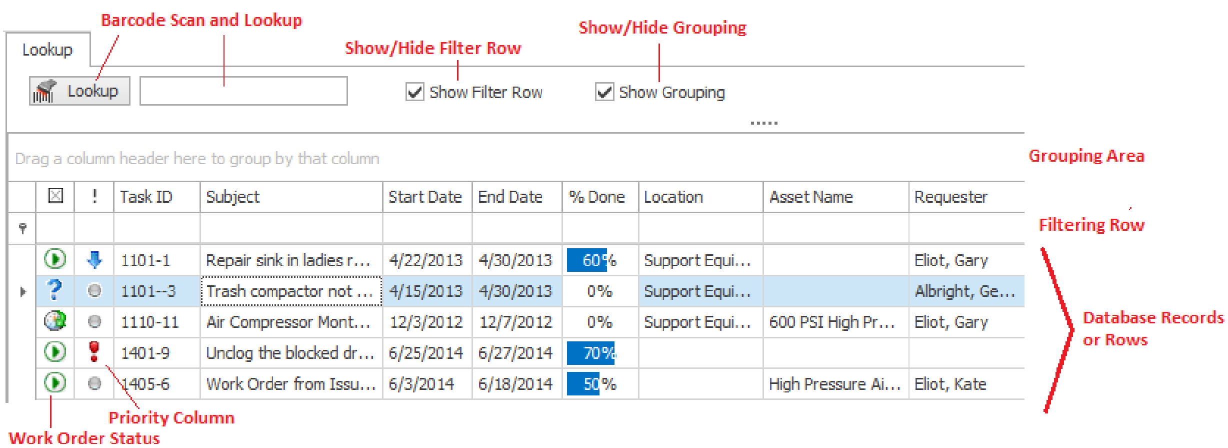
Features of the Work Requests Module

There are many features of the **Work and Requests** module, with the majority of these features found on either the tabbed pages found there, or within the tabbed ribbon control. We are going to explain the use of these features as we move through the tabbed pages.

Lookup Tab

This tab helps in locating work orders by grouping, filtering and sorting them. All the work orders in the current filter are located in the grid found there. To select a work order and make it the active record, the user needs only to click on the work order from within the grid. Once selected the user can click on the other tabs to view or edit the work order itself.

The following image illustrates the features available on the **Lookup** tab:



The functions of the **Lookup** tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab. Pay special attention to the following:

- Using the Lookup Grids
- Searching
- Scanned Lookups (Barcodes Support)

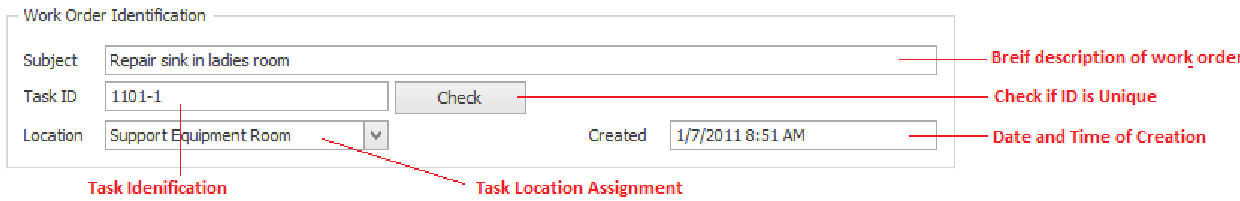
Details Tab

Under the Details tab you can setup your scheduling information, equipment, classification assignments, labor resources and other work order specifics.

Work Order Identification

This section allows you to specify a subject for your work order, a task ID, and the location to be used in the execution of the work order.

The following image illustrates the elements of the section:



Subject

This field can contain up to 100 alpha/numeric characters. Used for identification purposes, this should provide a brief description of the work order as it relates to the work to be performed.

Task ID

This field can contain up to 20 alpha/numeric characters and is normally created for you by the application. It uses the following format: YYMM-###, where YY is the year of work order creation, MM for the month of creation, and ### a sequential number.

If wanted, this field can be overwritten, but this is not advised. Also having a unique ID is not enforced. However, to verify that it is unique you can click on the **Check** button adjacent to this field.

Location

This field can contain up to 50 alpha/numeric characters and is used to describe the physical location of where this work order is to be performed.

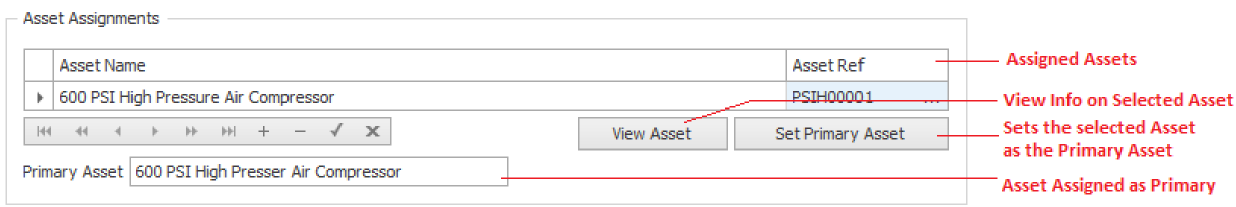
Created

This is set when a new work order is created.

Assigned Assets

You can assign an unlimited number of assets to a work order. However, only one of these will be used as the **Primary Asset**. Most of the available reports will be based on the **Primary** assignment.

The following image illustrates the elements of this section:



To assign an asset to the work order:

- Move to the **Assigned Assets** section and click on the **Append** (**+**) button in the data control found there.
- From the invoked lookup dialog, click on the asset record you want to assign.
- Click on the **Select** button.
- Click the **Post (check)** button in the Assets' data control to save your changes.

To set which asset to assign as the primary asset:

- Click on the asset you want to assign from those listed.
- Click the **Set Primary Asset** button.
- Click **Yes** to the prompt about setting the primary asset.
- The asset should be displayed in the **Primary Asset** field.

To remove an asset from the current work order:

- Click on the asset you want to remove from those listed.
- Click on **Remove (minus sign)** button in the Assets' data control.
- When prompted about the removable, click on the **Yes** button.
- Click the **Post (checkmark)** button in the Assets' data control.

To use the Auto Subject feature in this section:

- Click on the **Auto Subject** button found in this area.
- When prompted about accepting this new **Subject** title, click **OK**.

The auto subject feature combines the assigned work order type with information about the assigned primary asset to create a **Subject** title for the current work order, replacing any existing title.

Work Order Settings

The section allows you to setup the **Task Type** of the work order, the priority indicator, and the estimated downtime.

The following image illustrates the elements of the section:

Task Type (Work Order Type Assignment)

There are 7 possible task types available, with 6 of these having user definable titles. See the ***Work Orders Setup*** section of the ***Maintenance Scheduler*** chapter for more information.

To assign a **Task Type** to your work order:

- Click on the down arrow attached to this field.
- Click on the value you want to assign from those listed.

Priority

You can assign your work orders a priority indicator. Options include: Urgent, High, Normal and Low.

To assign a **Priority** to your work order:

- Click on the down arrow attached to this field.
- Click on the value you want to assign from those listed.

Estimated Down Time

You can record the estimated time you feel will be needed to completed a work order. This information shows on the work order itself, and can be used with reports.

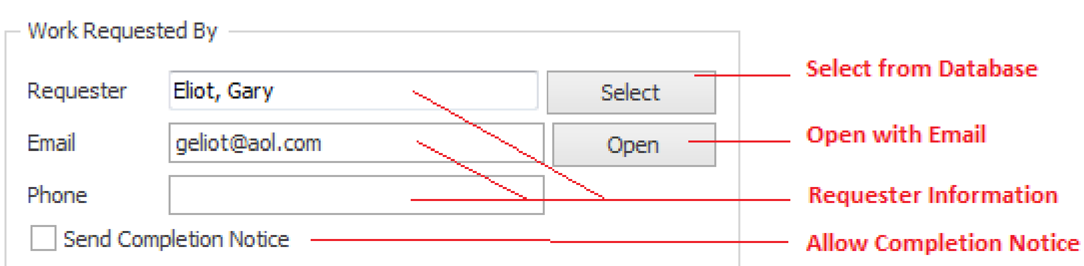
To assign the **Estimated Downtime** for your work order:

- Click on the down arrows adjacent to the **HRS** and **MINS** fields.
- Click on the value that you want to assign from those listed.

Work Requested By

This section allows you to specify who requested this work to be performed.

The following image illustrates the elements of this section:



To assign who request this work order:

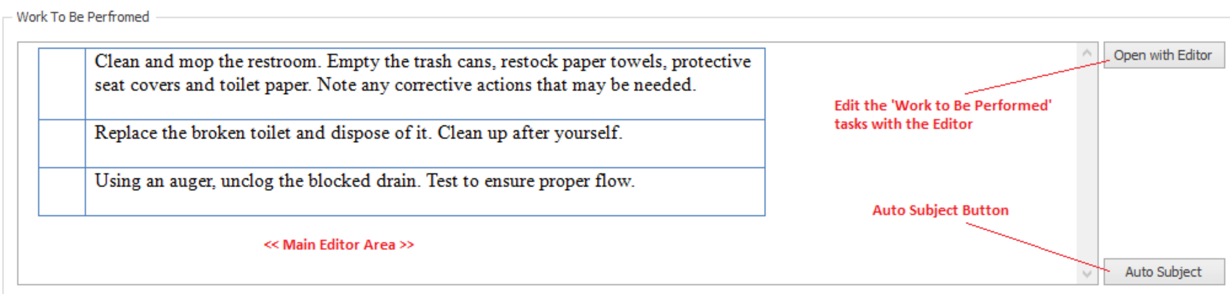
- Move to the **Work Requested By** group and click on the **Select** button.
- From the invoked lookup dialog, select the mechanic you want to assign and click on the **Select** button.

To email the requester:

- Move to the **Work Requested By** group and click on the **Open** button

Work to Be Performed

This section allows you to create tasks instructions to be used with Repair types of work orders. The following illustration shows the elements of this section.



To edit repair instructions or comments

- Select the work order you want to edit instructions for.
- Move to the **Details** tab.
- Move to the **Work to be Performed** group.
- Perform one of the following:
  - Type in your instructions or comments in the editor found there.
  - Click on the **Open with Editor** to edit your instructions or comments with the invoked ***Repair Procedures Editor***, clicking on the **Save and Close** button in the ribbon when done.

For more information on the editor, please refer to the ***Repair Procedures Editor*** in the ***Maintenance Scheduler*** chapter.

To use the Auto Subject feature in this section:

- Click on the **Auto Subject** button found in this area.
- When prompted about accepting this new subject title, click **OK**.

This auto subject is based on the Work to be Performed text as entered in the section editor.

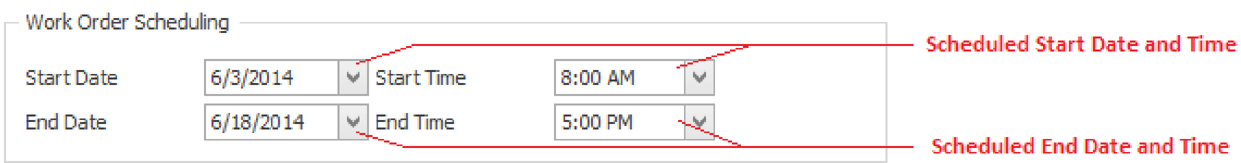
Administrator Tab

The **Administrator** Tab does not need to be accessed by the person requesting work to be done. They really only need to fill in the information on the **Details** tab. Your system administrator would use this tab to accept and make assignments for the work order.

Work Order Scheduling

This area sets up the work order scheduling criteria.

The following image illustrates the elements of this section:



Start Date and Time

These values would indicate the Scheduled date and time you would like work to commence on the work order.

To set these values:

- Click on the down arrows attached to these fields.
- Click the value you want to use from the drop down list.

End Date and Time

These values would indicate the Scheduled date and time you would like work to be completed by.

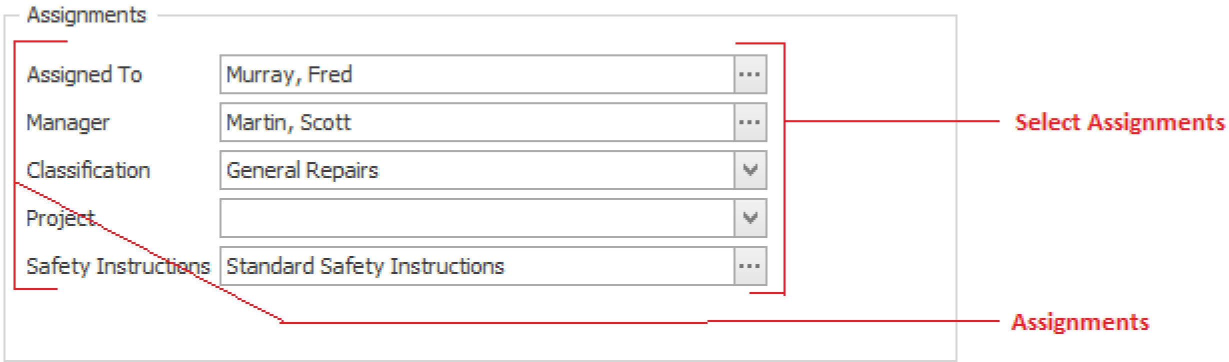
To set these values:

- Click on the down arrows attached to these fields.
- Click the value you want to use from the drop down list.

Assignments

This section allows you make some general type assignment to your work order. These assignments help with the creation of reports.

The following image illustrates the elements of this section:

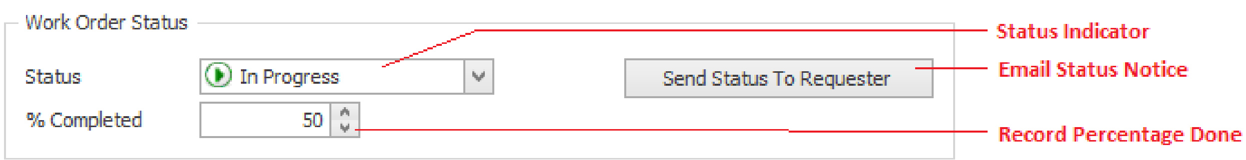


To make the assignments in this section:

- Move to the appropriate field with ellipse (...) buttons and click on the button.
- From the invoked lookup dialog, move to the grid and click on the record of your choice.
- Click on the **Select** button. Or
- Move to the appropriate field and click on the down arrow on the drop down list.
- Make your selection by clicking on it.

Work Order Status

The following illustrates the elements found in this section:



To change the Status of the current work order

- From the **Administrator** tab, move to the **Work Order Status** group.
- Select the status indicator your want to assign from the drop down list. Available options include:
  - New Request
  - Waiting Approval
  - Waiting on Parts
  - Waiting on Labor
  - Waiting on Production
  - Waiting on Contractor
  - On Hold (General)
  - Ready
  - In-Progress
  - Completed
  - Disapproved
- Move to the **% Completed** field to record this information.

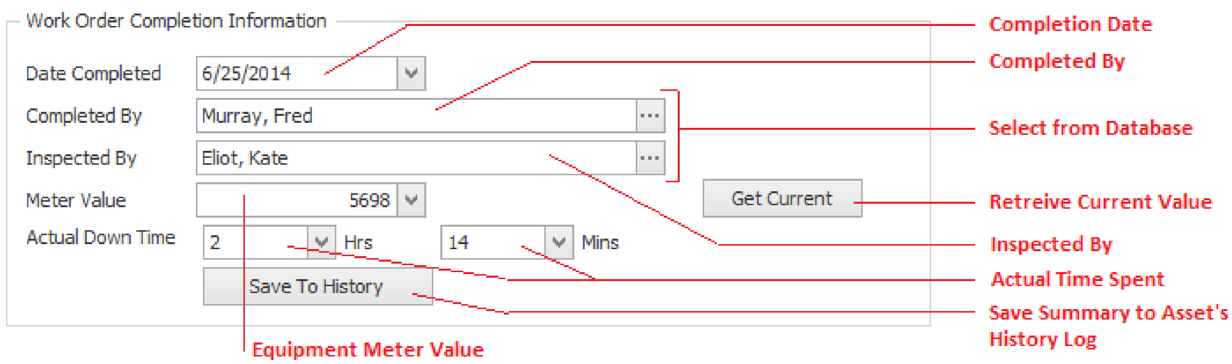
To Send Status to Requester

- From the **Administrator** tab, move to the **Work Order Status** group.
- Click on the **Send Status to Requester** button.
- When prompted about sending the email, click **Yes**.

Work Order Completion Information

This section allows you to record completion information as it relates to the currently selected work order.

The following illustrates the elements found in this section:



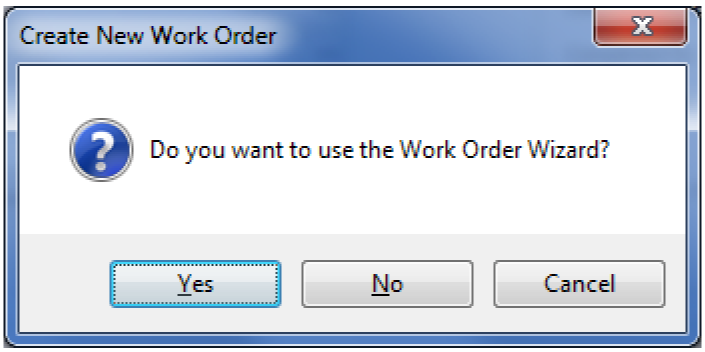
- **Date Completed** – Use the drop down calendar adjacent to this field to set the date the work order status was changed to 'Completed'.
- **Completed By** – Use the **Select** button adjacent to this field to assign an employee to this field.
- **Inspected By** – Use the **Select** button adjacent to this field to assign an employee to this field.
- **Meter Value** – This field would indicate the meter value, if applicable, of the primary asset at the time the work order was completed.
- **Get Current** – Clicking this button will cause the program to read the Primary Asset's record and retrieve its current meter value and insert it in to the **Meter Value** field.
- **Actual Down Time** – Use the **Hours** and **Minutes** fields found here to record the actual time it took to complete the selected work order.
- **Save to History** – Clicking this button will save a summary of the completed work order to **Primary's Asset History Log.**

Completion Notes and Delays

Use the editor found in this area to record any information as it applies to completion notes and delays. You can also click on the **Open with Editor** button to edit this information with a text editor.

Add New Work Order

To add a new work order:



- Move to the ***Work and Requests*** *module*.
- Move to the **Work Orders** tab in the ribbon and click on the **Add New** button.
- When prompted about the operation, click on the response of your choice.
  - **Yes** – Launches the ***Work Order Wizard*** that steps you through the creation process. This wizard will be explained later in this chapter.
  - **No** – Creates a new work and returns you to the **Details** tab where you can move through the fields editing and adding information as necessary.
  - **Cancel** – Backs out of the creation process.

Save Changes

To save changes to the main work order record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's ***Quick Access*** toolbar.

To save changes to the main work order record and all the underlying records (assets, etc.), click on the **Save Changes** button found on the **Work Orders** tab of the ribbon control.

Export the Current Work Order

To export the currently selected work order:

- Select the work order you want to export.

- Open the **File** menu and select the **Export Work Order** option.
- Browse and select the folder you want to export to.
- Type in a name for the export file in the **File name** text box.
- Move to the **Save as type** drop down and select the export file type of your choice.
- Click the **Save** button.

Printing the Current Work Order

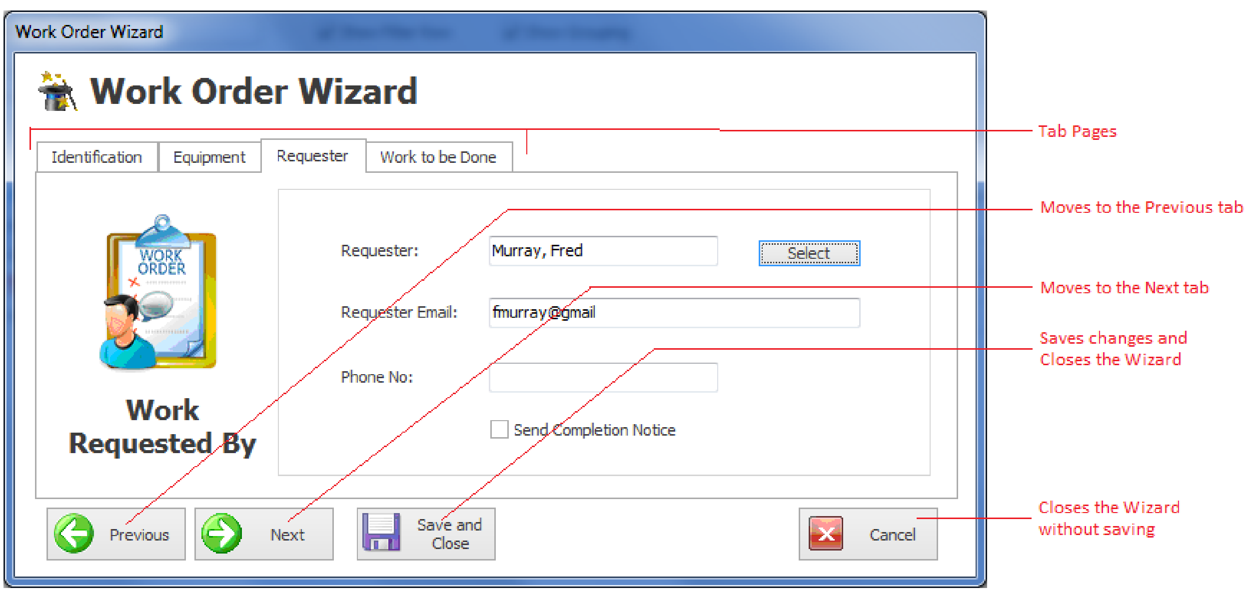
To print the current work order:

- Open the **File** menu and expand the **Print** sub-menu by clicking on it.
- Select the print option of your choice.

Work Order Wizard

The ***Work Order Wizard*** when accessed from this module will help ease in the work order creation by stepping you through the process. This wizard is also accessible from the ***Issues Tracking Modules***, ***Safety Management*** and the ***Personal Manager***.

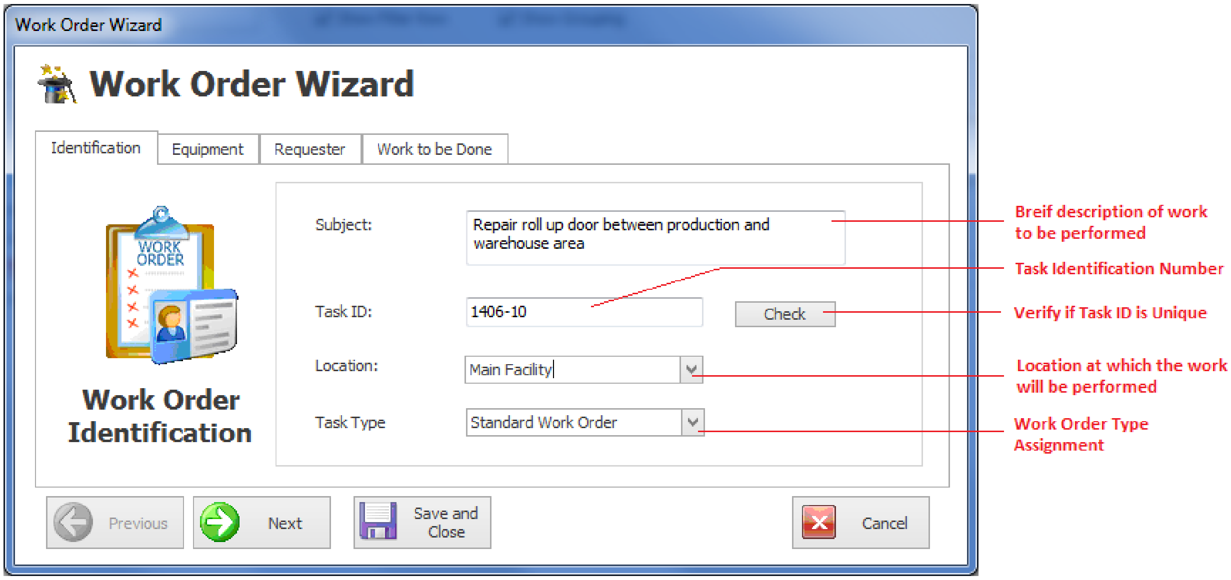
The following illustration shows the general or shared features of the Wizard:



- **Tab Pages –** This is a logical way of grouping controls by function.
- **Previous** – Clicking this button moves you to the previous tab.
- **Next** – Clicking the button moves you to the next available tab.
- **Save and Close** – Clicking this button saves any changes you may have made, and closes the Wizard.
- **Cancel** – Clicking this button closes the wizard without applying any changes made.

Wizard Identification Tab

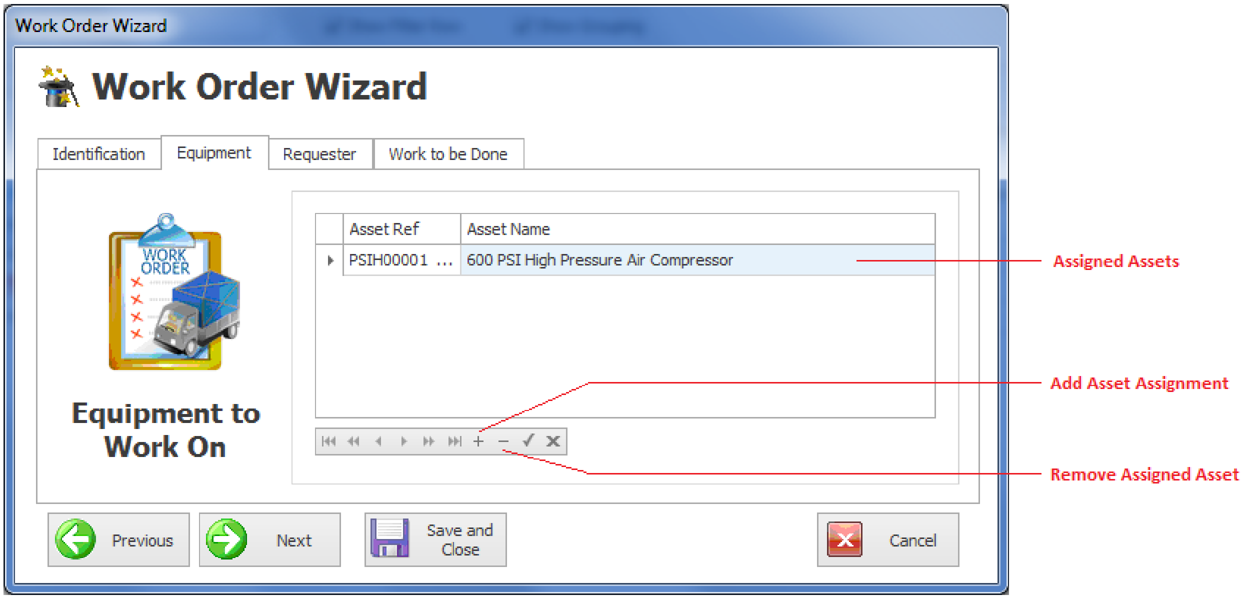
The following illustration shows the elements on this tab:



- **Subject** – This is a brief description of the work order. It can contain up to 100 alpha/numeric characters.
- **Task ID** – This is generated for you by the program. You are allowed to edit this value, but it is not recommended.
- **Check** – This checks to ensure that the supplied **Task ID** is unique in the database. If it was generated by the program then is already known to be unique.
- **Location** – This specifies the location at which the work order will be performed, and is selectable from the drop down list.
- **Task Type** - There are 7 possible task types available, with 6 of these having user definable titles. See the ***Work Orders Setup*** section of the ***Maintenance Scheduler*** chapter for more information.

Wizard Equipment Tab

You can assign an unlimited number of assets to a work order. The following image illustrates the elements of this section:



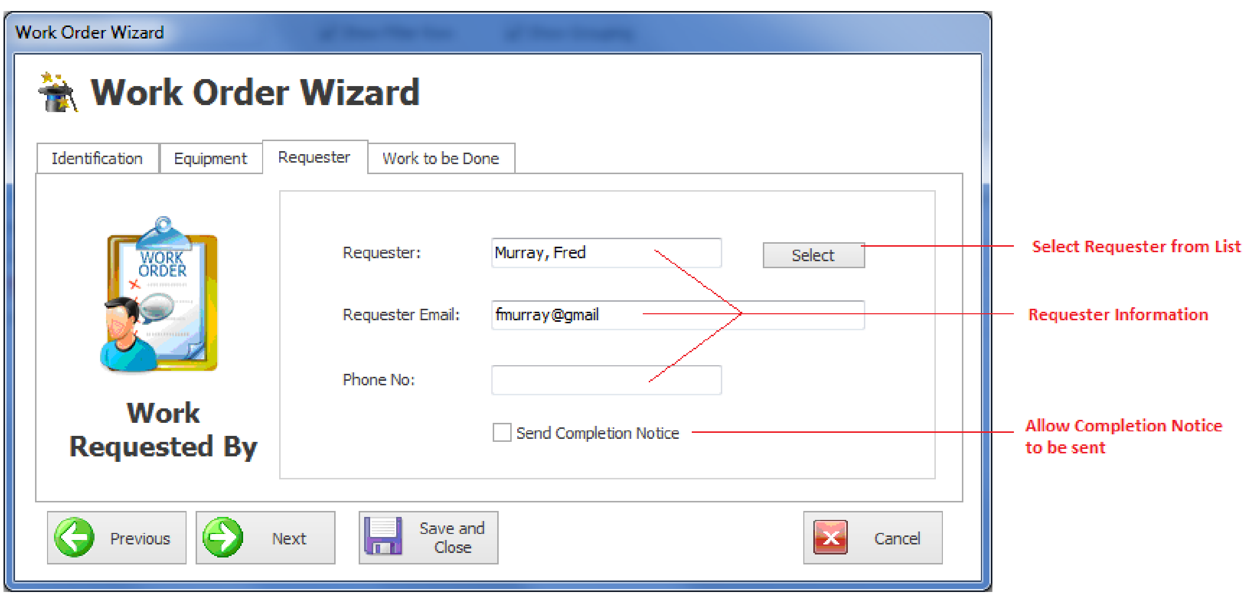
To assign an asset to the work order:

- Move to the **Assigned Assets** section and click on the **+** (plus sign) in the data control found there.
- From the invoked lookup dialog, click on the asset record you want to assign.
- Click on the **Select** button.

Wizard Requester Tab

This section allows you to assign the person requesting the work to be performed.

The following image illustrates the elements of this section:



To assign who requested this work order:

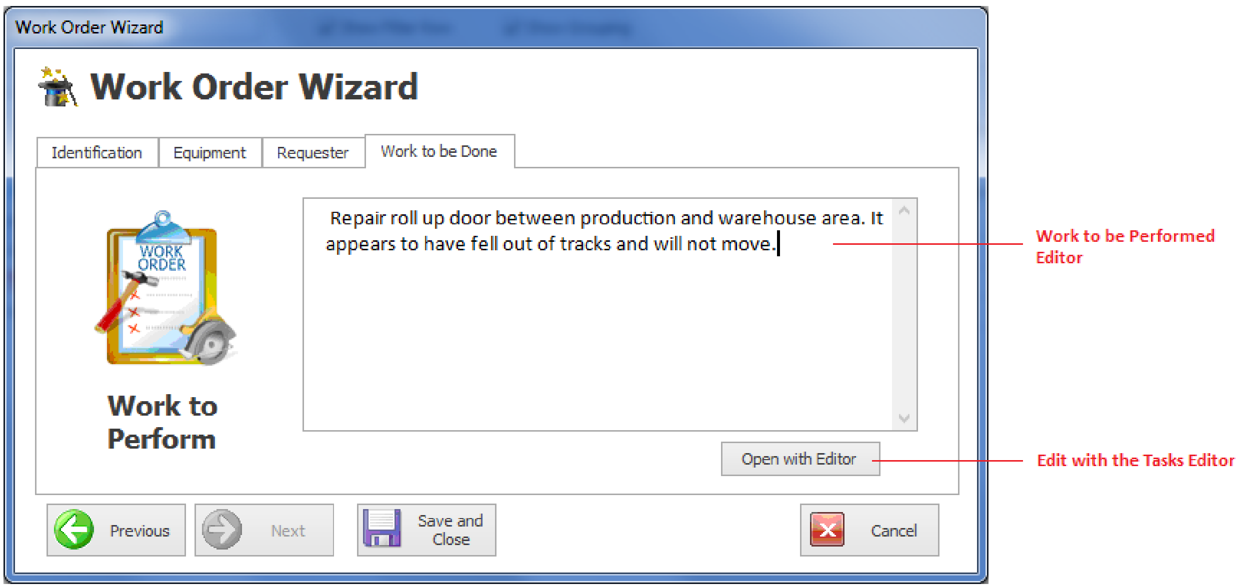
- Move to the **Requester** field and click on the **Select** button.
- From the invoked lookup dialog, select on the employee you want to assign and click on the **Select** button.

To allow a Completion Notice to be sent to the requester:

- Check the **Send Completion Notice** checkbox

Wizard Work to be Done Tab

The following illustration shows the elements on this tab:



To include work instruction for repair types of work orders

- Move to the **Work to be Performed** section and edit your instructions in the editor found there. You can also click on the **Open with Editor** button found in this area and use the ***Repair Procedures Editor*** discussed in the ***Maintenance Scheduler*** chapter.

Wizard – Save and Close

Whenever you either make changes to work orders, or create a new one with **Work Order Wizard**, ensure to save your changes.

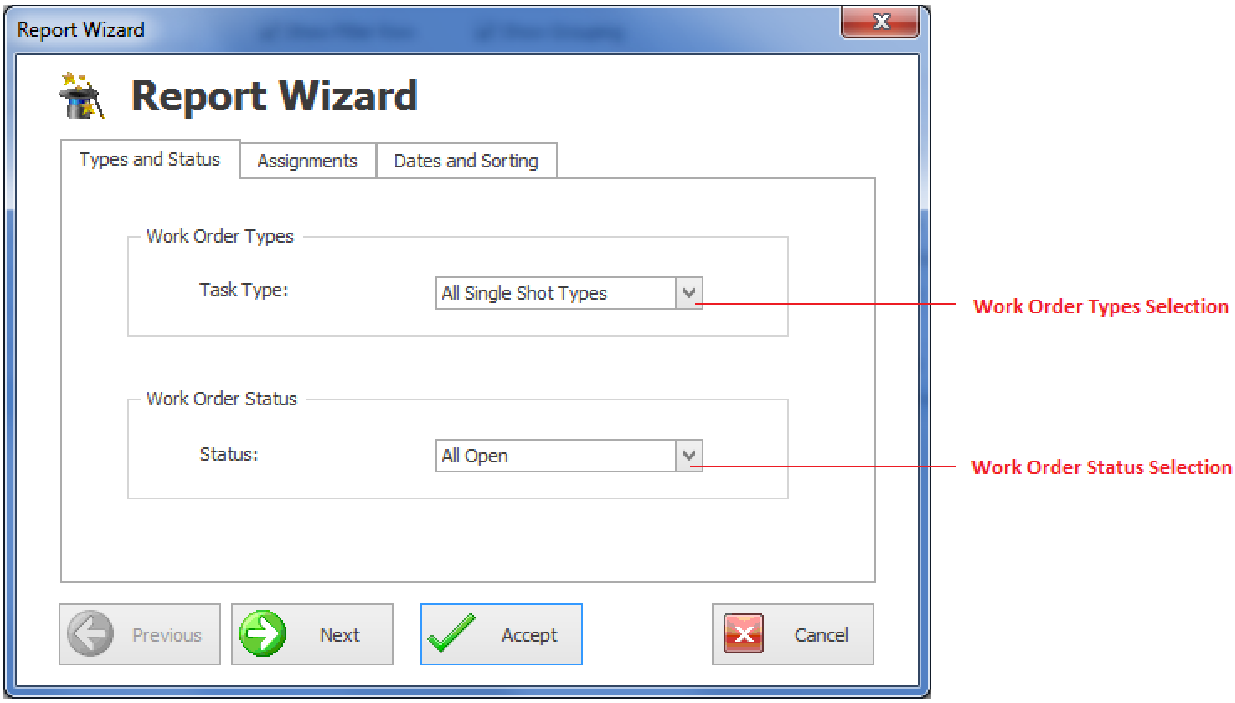
- Click on the **Save and Close** button to save and apply your changes.

Main Report – Filter Wizard

This Wizard is used or both the **Filter Wizard** and **Main Report Wizard** of the ***Work and Request Orders*** module. When used for either filtering or reporting purposes, the resulting items will be returned by the choices or criteria as setup with this wizard.

Types and Status tab

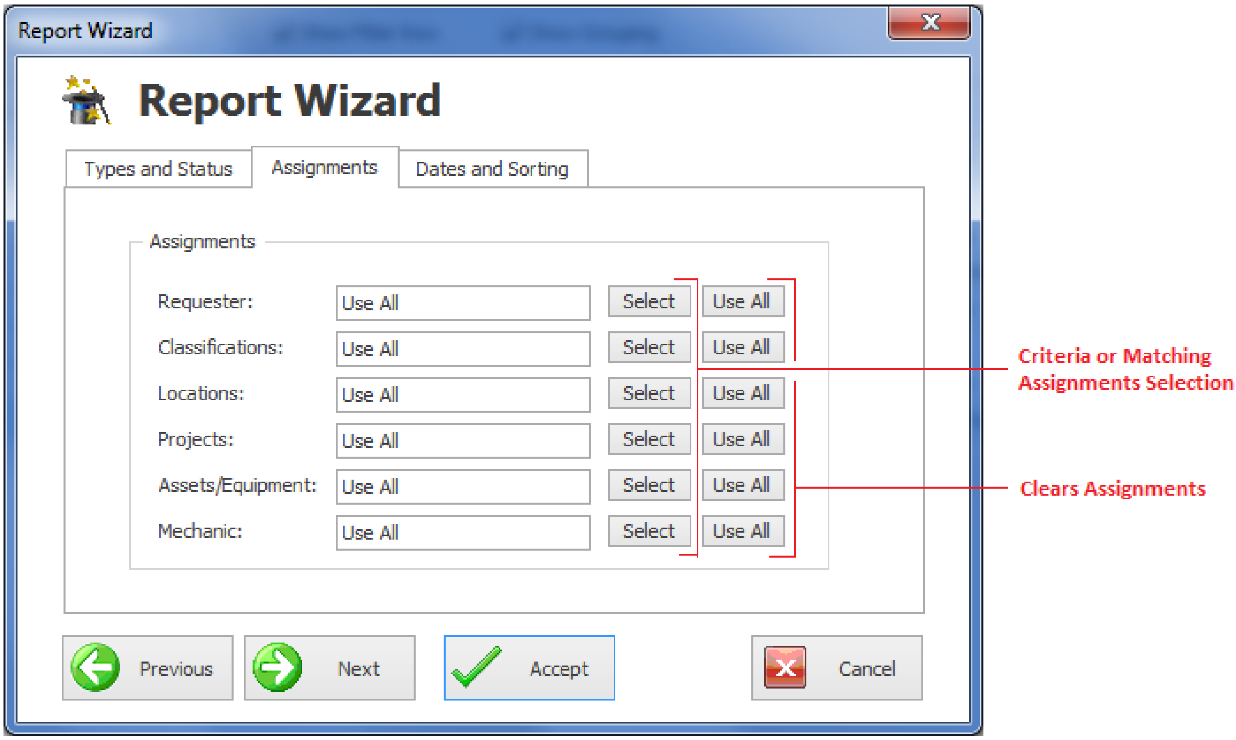
The following illustrates the elements found on this tab:



- **Work Order Types** – This drop down allows for the selection of the types of work orders to be included. Make your selection by clicking on an item in the drop down list.
- **Work Order Status** – This drop down allows for the selection of the work orders status indicator to be included. Make your selection by clicking on an item in the drop down list.

Assignments tab

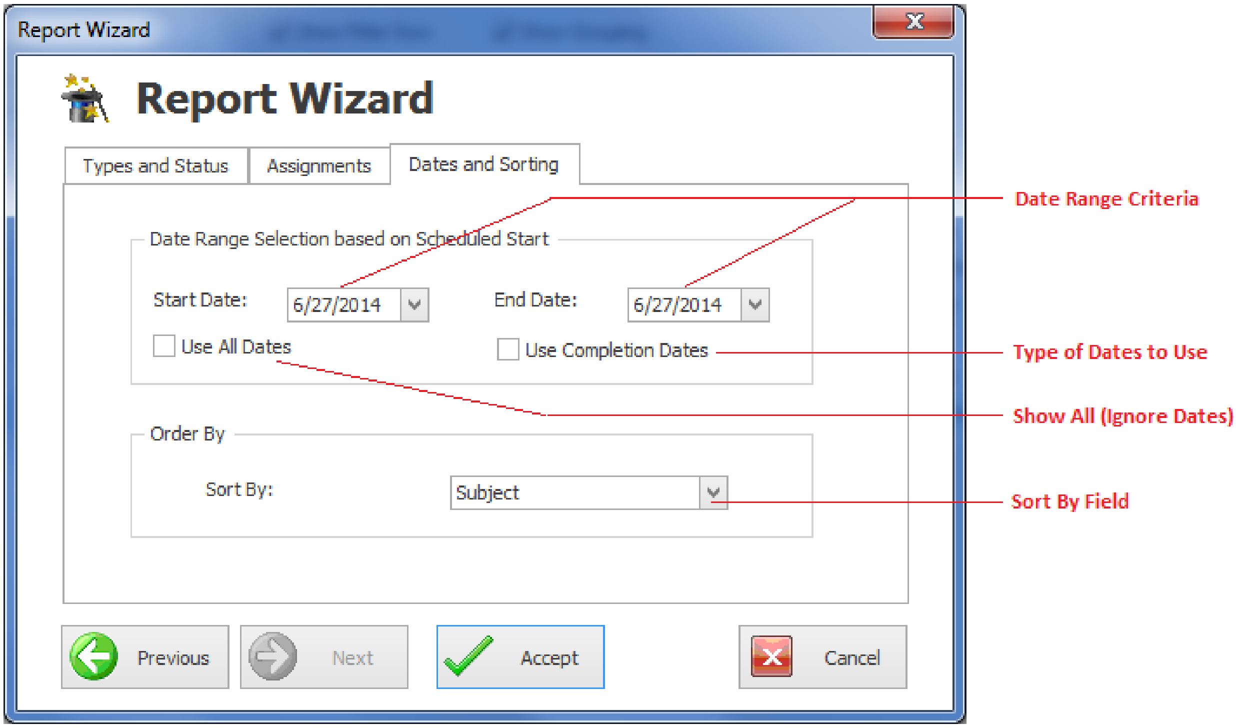
The following illustrates the elements found on this tab:



- To assign values to these fields:
  - Move to the appropriate fields and click on the **Select** button adjacent to them. Available options include:
    - Requester
    - Classifications
    - Locations
    - Projects
    - Assets/Equipment
    - Mechanic (Employee)
  - From the invoked dialogs, move to the displayed grid and click on the record of your choice.
  - Click on the **Select** button.
- To clear the assignments:
  - Move to the appropriate field and click on the **Use All** button adjacent to them.

Dates and Sorting Tab

The following illustrates the elements found on this tab:



To assign date values:

- Move to the **Start Date** field and using the drop down calendar, select the starting date of your filtering criteria.
- Move to the **End Date** field and using the drop down calendar, select the ending date of your filtering criteria.
- To ignore or use all available dates, check the **Use All Dates** checkbox.
- To use completion dates, place a checkmark in the **Use Completion Dates** checkbox. Otherwise, Scheduled Start Dates will be used.
- Move to the **Sort By** drop down, and select how you want things sorted by.
- With everything setup as wanted, move to and click on the **Accept** button.

Main Report Wizard

This report uses the ***Main Reports – Filter Wizard*** for the creation of report criteria. Please refer to the ***Main Reports – Filter Wizard*** section of this chapter for more information. The only elements of this wizard that is not explained with this wizard is outlined next.

These options are found on the **Dates and Sorting** tab of the wizard.

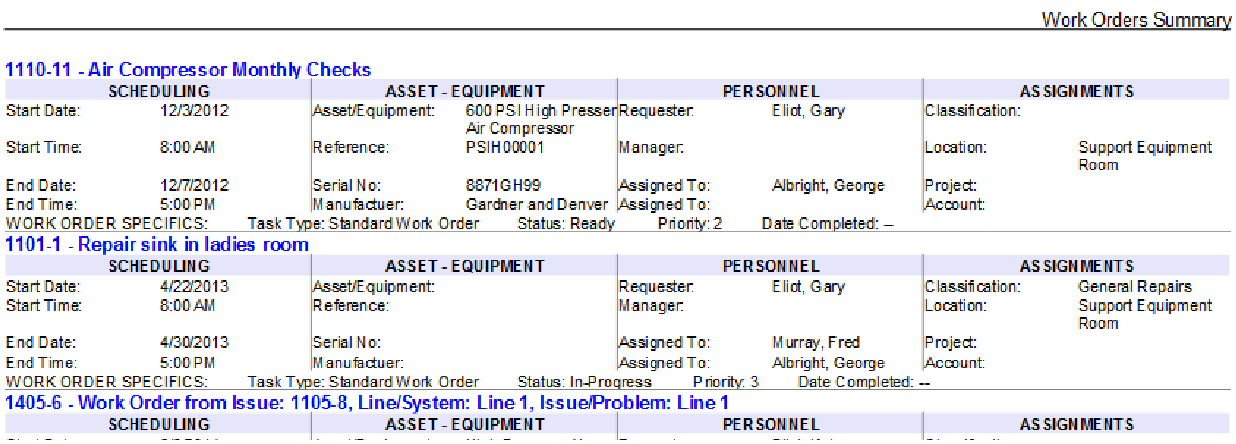
- **Include Task Instructions** – When checked, the report will include all task instructions as assigned to each of the reported work orders.

- **Include Delays and Completion Comments** – When checked, the report will include all **Delays and Completions comments** that were recorded for each of the reported work orders.

To create a ***Work Orders Summary Report***:

- Move to the **Work Orders** tab in the ribbon.
- Click on the **Main Report Wizard** option.
- Follow the instructions as outlined in the ***Main Reports – Filter Wizard*** section of this chapter.

The following illustration shows a preview of a *Work Orders Summary Report*:



Work Orders Summary

1110-11 - Air Compressor Monthly Checks

SCHEDULING		ASSET - EQUIPMENT		PERSONNEL		ASSIGNMENTS	
Start Date:	12/3/2012	Asset/Equipment:	600 PSI High Presser Air Compressor	Requester:	Eliot, Gary	Classification:	
Start Time:	8:00 AM	Reference:	PSIH00001	Manager:		Location:	Support Equipment Room
End Date:	12/7/2012	Serial No:	8871GH99	Assigned To:	Albright, George	Project:	
End Time:	5:00 PM	Manufactuer:	Gardner and Denver	Assigned To:		Account:	

WORK ORDER SPECIFICS: Task Type: Standard Work Order Status: Ready Priority: 2 Date Completed: --

1101-1 - Repair sink in ladies room

SCHEDULING		ASSET - EQUIPMENT		PERSONNEL		ASSIGNMENTS	
Start Date:	4/22/2013	Asset/Equipment:		Requester:	Eliot, Gary	Classification:	General Repairs
Start Time:	8:00 AM	Reference:		Manager:		Location:	Support Equipment Room
End Date:	4/30/2013	Serial No:		Assigned To:	Murray, Fred	Project:	
End Time:	5:00 PM	Manufactuer:		Assigned To:	Albright, George	Account:	

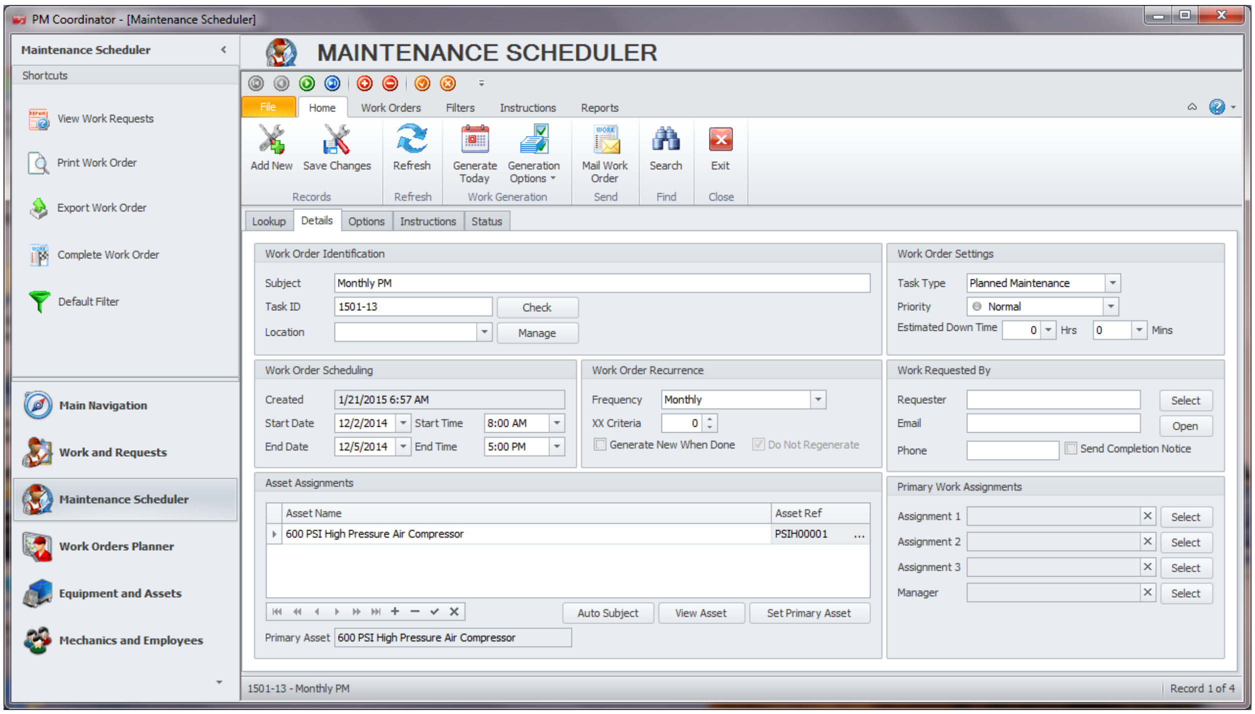
WORK ORDER SPECIFICS: Task Type: Standard Work Order Status: In-Progress Priority: 3 Date Completed: --

1405-6 - Work Order from Issue: 1105-8, Line/System: Line 1, Issue/Problem: Line 1

SCHEDULING	ASSET - EQUIPMENT	PERSONNEL	ASSIGNMENTS

Maintenance Scheduler

The **Maintenance Scheduler** module is the heart of all CMMS type programs, and you'll find ours to be extremely powerful, feature rich, and easy to use. The **Maintenance Scheduler** module was designed to handle all work order types. These include recurring and one time, or repair types of work orders.



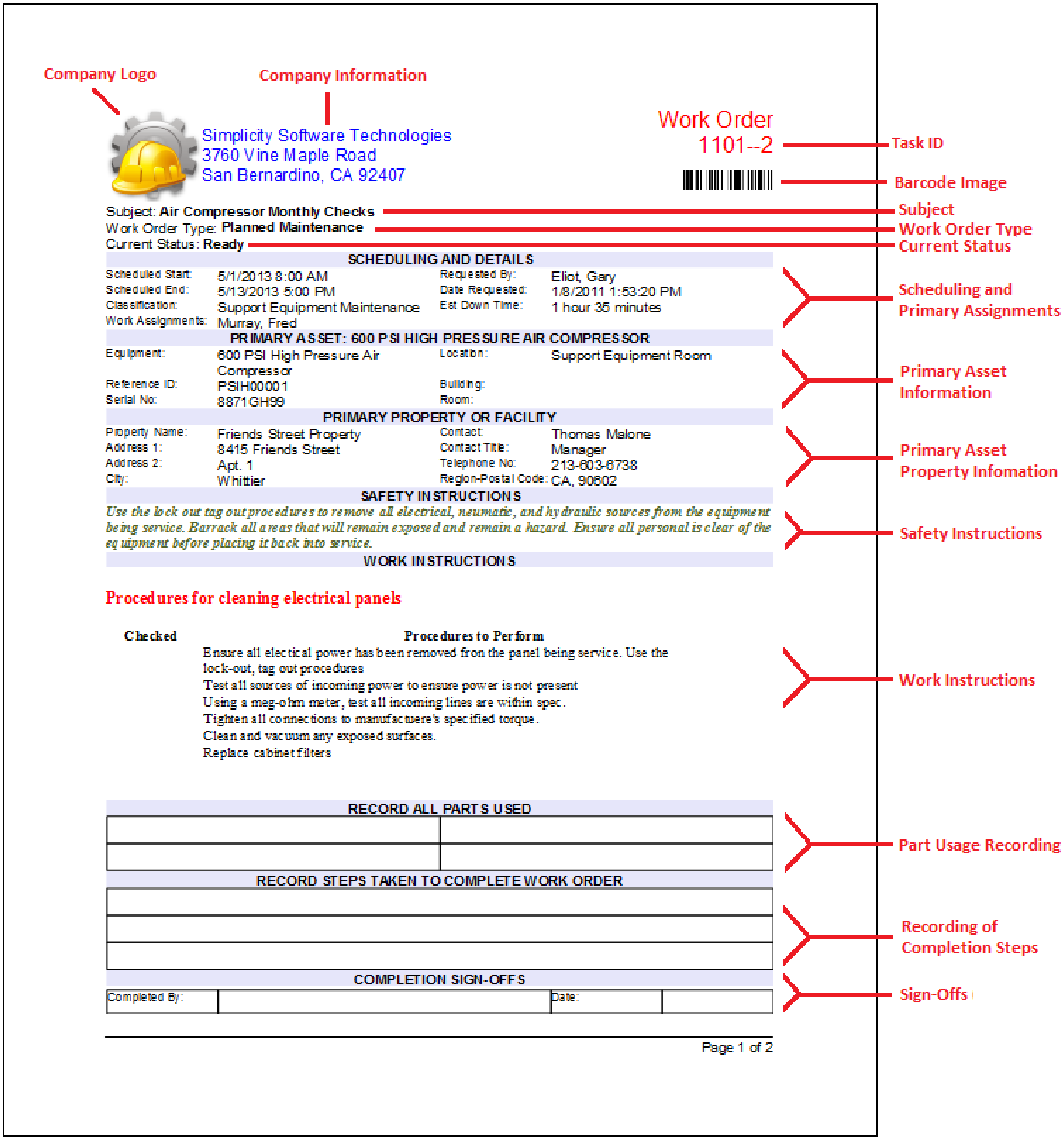
One of the most valuable features of this module is found in its ability to create and use recurring work order type tasks. Once a work order has been setup, the program will handle the responsibility of keeping track of when the work order is next due to be performed, and will schedule it accordingly, and automatically as the module is opened.

This module also accommodates for the easy creation of reports, and when possible, it employs the use of report wizards. With the wizards you can create some fairly custom reports, specifying the criteria needed for the report creation. These reports will allow you to view and analyze information in a way that is right for you and your organization.

The system supports 5 recurring work order types, 4 of these have user definable titles. There are 7 standard, or repair types of work orders, with 6 of these having user defined titles. Out of these 11 work order types, 2 are designated as Contractor/Vendor types, with 1 belonging to the repair, one-time group, and the other one belonging to the recurring, PM types group.

Printed Work Order Documents

The next illustration outlines the elements on a printed work order document. Most of these elements can be turned on or off and further customized through the **Work Orders Setup**.



Simplicity Software Technologies
3760 Vine Maple Road
San Bernardino, CA 92407

Work Order
1101--2

Subject: **Air Compressor Monthly Checks**
Work Order Type: **Planned Maintenance**
Current Status: **Ready**

SCHEDULING AND DETAILS

Scheduled Start:	5/1/2013 8:00 AM	Requested By:	Eliot, Gary
Scheduled End:	5/13/2013 5:00 PM	Date Requested:	1/8/2011 1:53:20 PM
Classification:	Support Equipment Maintenance	Est Down Time:	1 hour 35 minutes
Work Assignments:	Murray, Fred		

PRIMARY ASSET: 600 PSI HIGH PRESSURE AIR COMPRESSOR

Equipment:	600 PSI High Pressure Air Compressor	Location:	Support Equipment Room
Reference ID:	PSIH00001	Building:	
Serial No:	8871GH99	Room:	

PRIMARY PROPERTY OR FACILITY

Property Name:	Friends Street Property	Contact:	Thomas Malone
Address 1:	8415 Friends Street	Contact Title:	Manager
Address 2:	Apt. 1	Telephone No:	213-603-6738
City:	Whittier	Region-Postal Code:	CA, 90602

SAFETY INSTRUCTIONS

Use the lock out tag out procedures to remove all electrical, neumatic, and hydraulic sources from the equipment being service. Barrack all areas that will remain exposed and remain a hazard. Ensure all personal is clear of the equipment before placing it back into service.

WORK INSTRUCTIONS

Procedures for cleaning electrical panels

Checked	Procedures to Perform
	Ensure all electical power has been removed fron the panel being service. Use the lock-out, tag out procedures
	Test all sources of incoming power to ensure power is not present
	Using a meg-ohm meter, test all incoming lines are within spec.
	Tighten all connections to manufactuere's specified torque.
	Clean and vacuum any exposed surfaces.
	Replace cabinet filters

RECORD ALL PARTS USED

RECORD STEPS TAKEN TO COMPLETE WORK ORDER

COMPLETION SIGN-OFFS

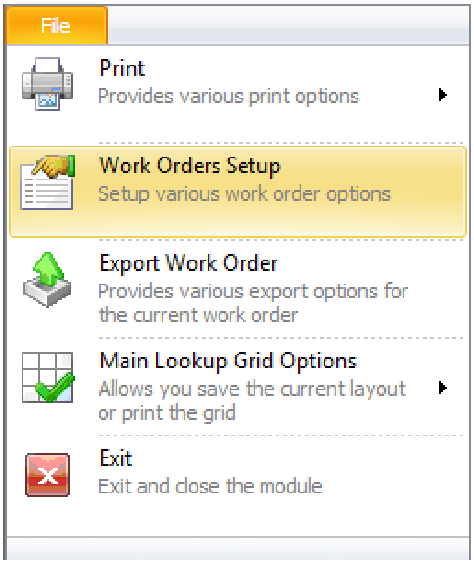
Completed By:		Date:	

Page 1 of 2

Work Orders Setup

The Scheduler module allows you to setup various options for use with this and the **Work Requests** modules. This includes elements on the printed documents, view options, and other general features.

To access the **Work Orders Setup** screen:



- Move to the **Main Scheduler**.
- Click on the **File** button in the ribbon and click the **Work Orders Setup** option.

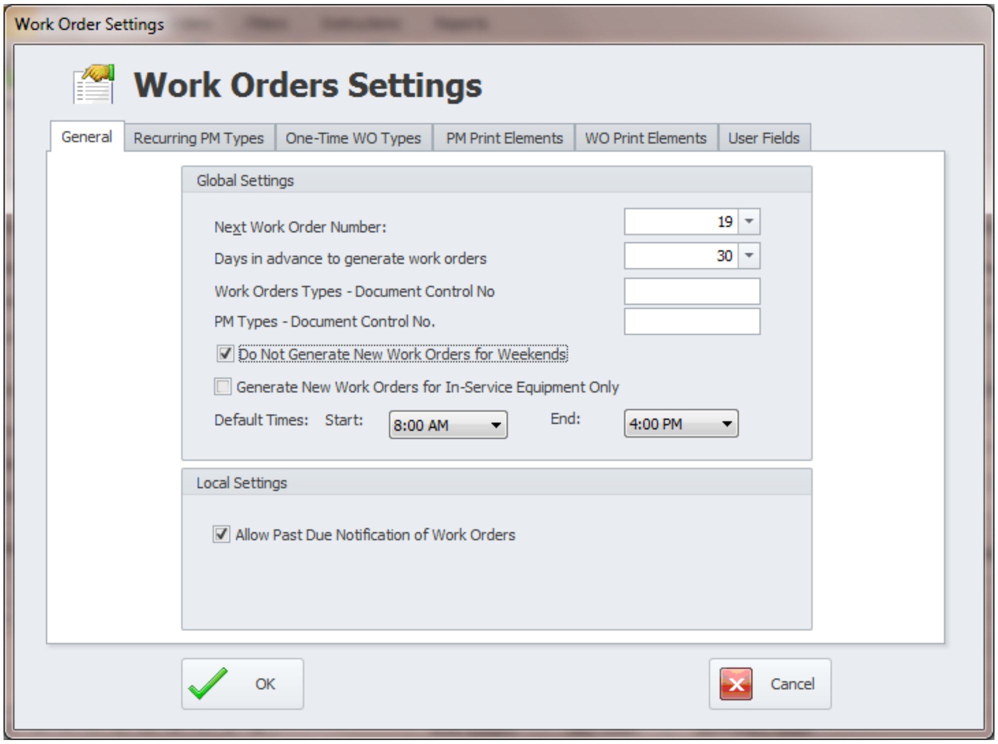
General Tab

This tab allows you to specify the following options:

GLOBAL SETTINGS

- **Next Work Order Number** -The number here specifies the next sequential number to use in the automatic work order number generation. These numbers use the following format: *yymm – xx*. Where *yy* equals the year of task creation, mm equals the month of task creation, and *xx* is a sequential number.
- **Days in Advance to Generate Work Orders** - To help keep the database at a reasonable size, we allow you to specify how many days in advance to generate or display work orders.
- **Work Order Types - Document Control Number**: This is the ISO document control number you want to assign to repair types of work orders.
- **PM Types - Document Control Number -** This is the ISO document control number you want to assign to recurring types of work orders.
- **Do No Generate New Work Orders for Weekends -** Selecting this option will prevent new work works from being scheduled on weekends. If it does fall on a weekend, it will be moved to the following Monday. *This applies to auto recurring work orders only.*

- **Generate New Work Orders for In-service Equipment Only -** Selecting this option prevents the automatic creation of new work orders when the assigned equipment record has not been placed in service. Please refer to the ***Equipment and Assets*** chapter for more information.
- **Default Times**: Allows you to setup the default 'Scheduled' **Start** and **End** *Times* to be used as new work orders are created. Change the values by selecting new values from the drop down lists.



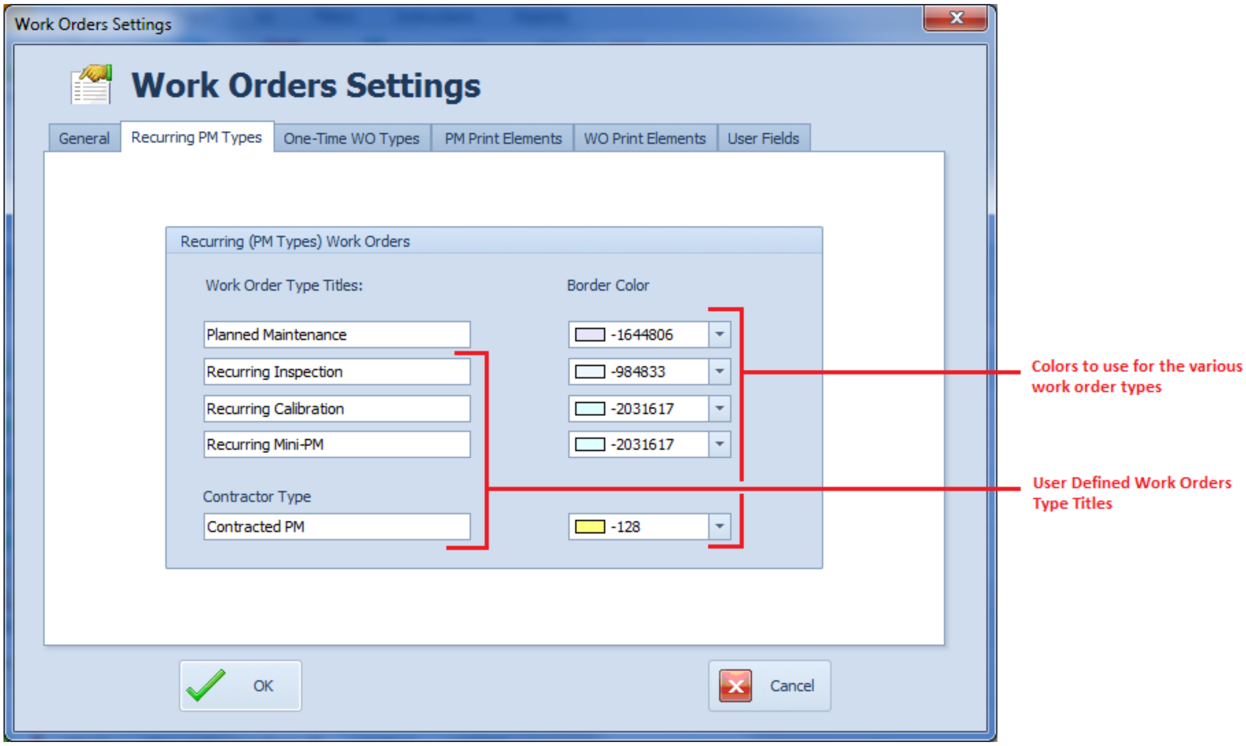
LOCAL SETTINGS

- **Allow Past Due Notification of Work Orders**: Selecting this option allows a popup to be displayed when you first enter the *Maintenance Scheduler* module. This signals the user about work orders that are still open, but the scheduled completion dates have past. You then have the option of filtering the database by only past due work orders.

NOTE: Global Settings are applied throughout the system, and from wherever the application is running from. Local Settings on the other hand only apply to the local computer from where these settings were made.

Recurring PM Types Tab

This tab allows you to setup the **Work Type Titles** to be used for recurring, or PM types of work orders. You can specify the colors to be used by the printed documents' section headers. To conserve ink with these documents we suggest using a light, or even a white/clear color.



To change a Title

- Edit the displayed title to your liking.

To setup the colors to use

- Click on the down arrow adjacent to the task Work Order type you want to setup.
- Select the color of your choice by clicking on it.

One-Time WO Types Tab

This tab allows you to setup the **Work Type Titles** to be used for one-time, or repair types of work orders. You can specify the colors to be used by the printed documents' section headers. To conserve ink with these documents we suggest using a light, or even a white/clear color.

To change a Title

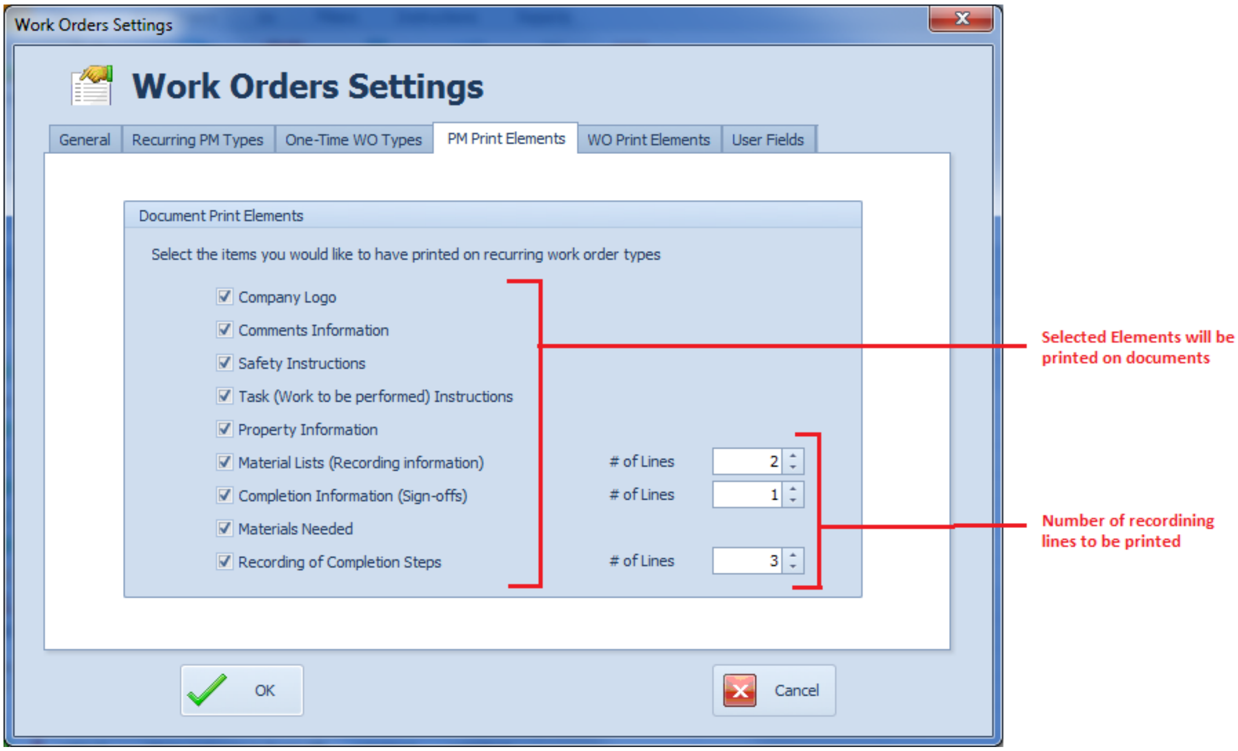
- Edit the displayed title to your liking.

To setup the colors to use

- Click on the down arrow adjacent to the task Work Order type you want to setup.
- Select the color of your choice by clicking on it.

PM Print Elements Tab

Select the options on this tab that you want printed on your recurring types of work order documents. A checkmark indicates the item will be printed. Removing the checkmark will prevent printing.



With the **Material List, Completion Information (Sign-offs)** and **Recording of Completion Steps** sections, you have the ability to print 1 to multiple lines of information for the purpose of recording this information.

To specify the number of lines to print on the documents:

- Move to the **Spin** buttons adjacent to these fields and near the **# of Lines** area.
- Using the **Up** or **Down** arrows, adjust these values to the number of lines you want printed.

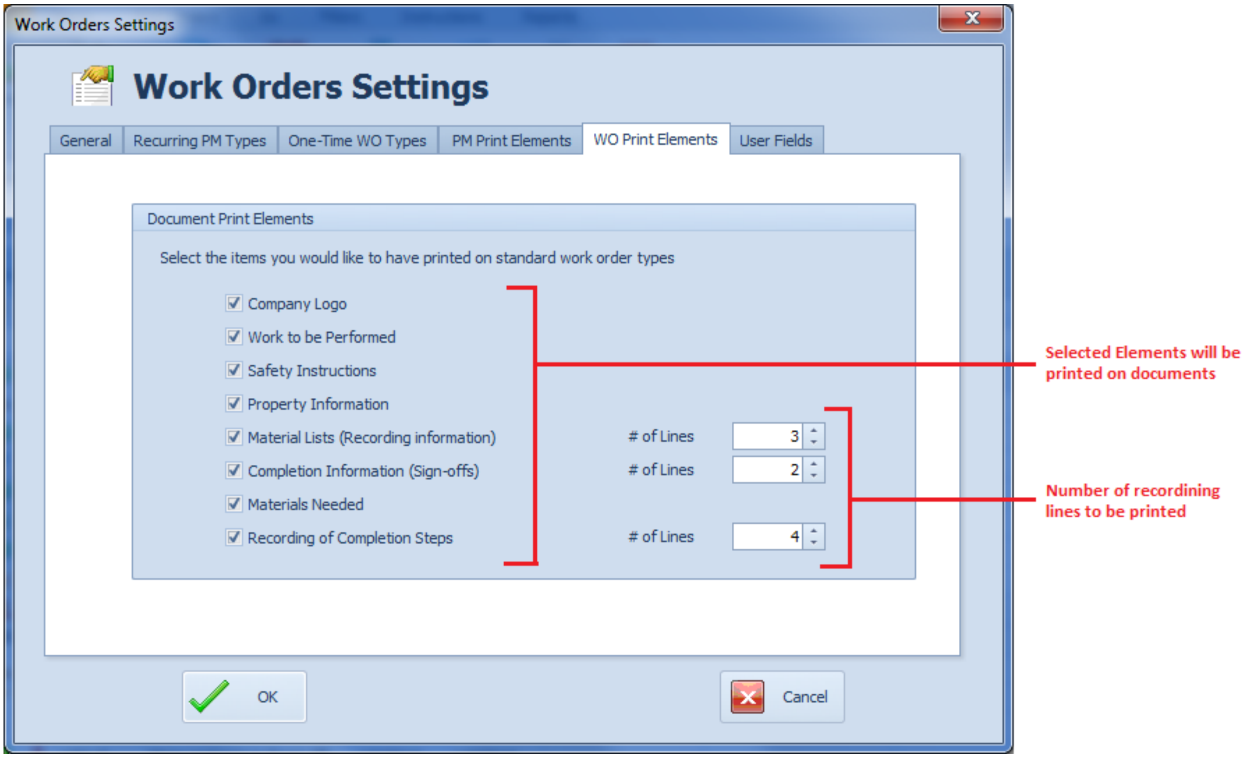
WO Print Elements Tab

Select the options on this tab that you want printed on your recurring types of work order documents. A checkmark indicates the item will be printed, removing the checkmark prevent the item from printing.

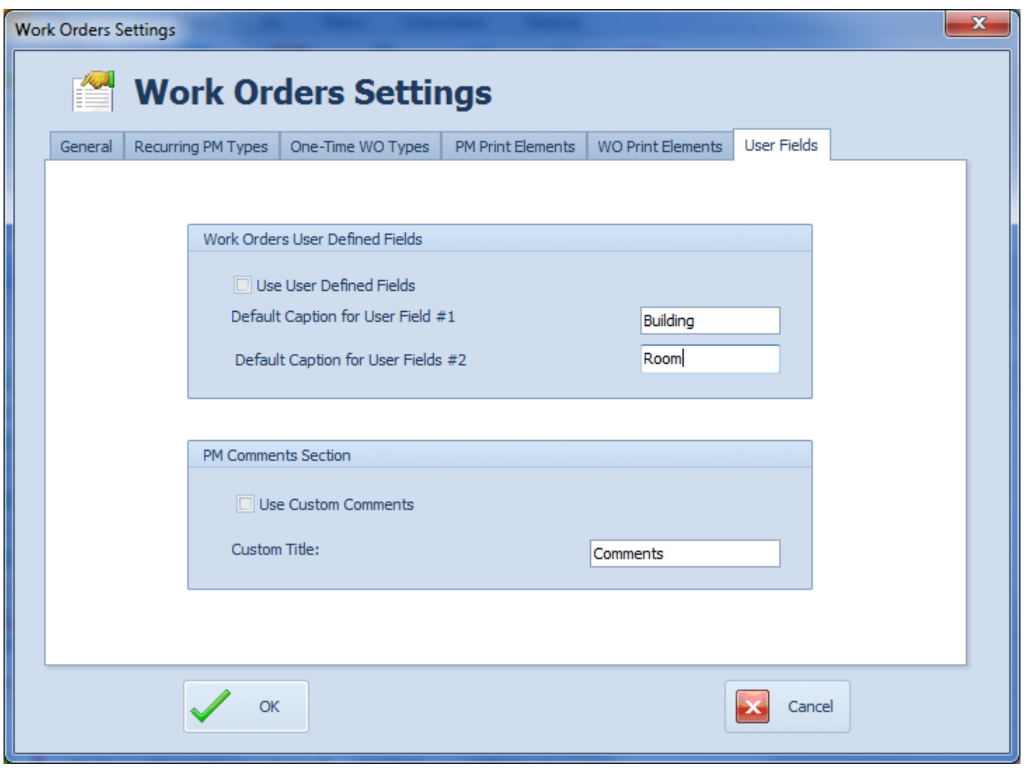
With the **Material List, Completion Information (Sign-offs)** and **Recording of Completion Steps** sections, you have the ability to print 1 to multiple lines of information for the purpose of recording this information.

To specify the number of lines to print on the documents:

- Move to the **Spin** buttons adjacent to these fields and near the **# of Lines** area.
- Using the **Up** or **Down** arrows, adjust these values to the number of lines you want printed.



User Fields Tab



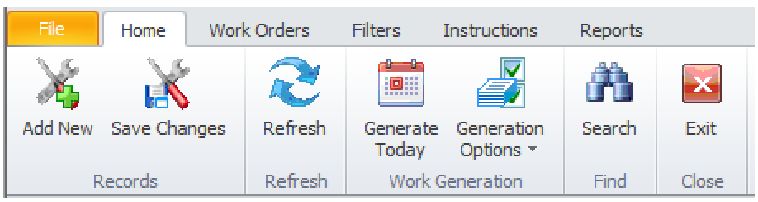
This tab allows you to setup the following elements:

- **Use User Defined Fields** – Placing a checkmark here will cause the user-defined fields to show up on the printed document.
- **Work Orders User Defined Fields** – This allows you to specify the default user defined fields' titles that will be filled in for you when a new work order is created. You can change these on the original work order at any time after the creation process is completed.
- **Use Custom Comments** – Placing a checkmark here will cause the program to use your custom Comments Section title. Leaving this unchecked will cause the program to use its own built in title of "Comments".
- **Custom Title** - Here you would specify the custom title you would like to use for the Comments field of PM types of work orders.

Ribbon Control

The comprehensive functionality of the *Main Scheduler* is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

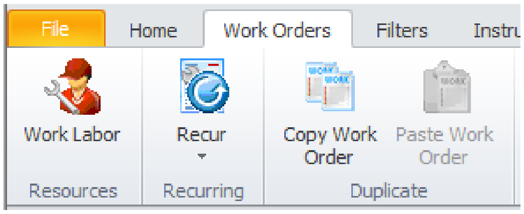
HOME TAB



The following are the elements on the **Home** ribbon tab, reading left to right:

- **Add New** – Creates a new work order document through the use of a wizard, or directly on screen.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Refresh** – Re-reads the databases and returns new or changed information.
- **Generate Today** – Shows all work orders scheduled to start today and allows printing these work orders.
- **Generate Options**
    - **Generate by Dates –** Allows you to view and print all work orders that fall with a date range.
    - **Generate by Classification -** Allows you to view and print all work orders that fall within a date range and has a specific classification assignment.
    - **Generate by Location -** Allows you to view and print all work orders that fall within a date range and has a specific location assignment.
- **Search** – Invokes the search routine on the Lookup Grid as explained in the ***Common Features*** chapter.
- **Exit** – Close the Maintenance Scheduler module.

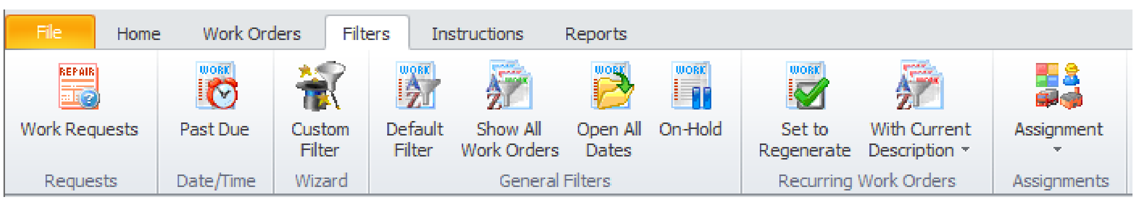
WORK ORDERS TAB



The following are the elements found on the **Work Orders** tab:

- **Work Labor –** Allows you to assign mechanics' estimated and actual times needed in the work order completion.
- **Recur –** Provides options for recurring work order types.
    - **Set Next Meter –** Allows you to specify the meter value of the Primary Asset to reach, for the current work order to become due.
    - **Change 'Do Not Generate' flag –** This allows you to either start or stop a recurring work from regenerating itself.
- **Copy Work Order –** Makes a copy of the current work order fields for re-insertion. Note: Only the primary fields are copied.
- **Paste Work Order –** Pastes a previously copied work order over the currently selected one.

FILTERS TAB



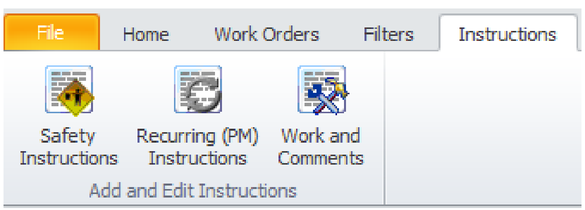
The following are the elements found on the **Filters** tab:

- **Work Requests** – Filters the database to view only those records with a status of Work Request.
- **Paste Due** – Filters the database by all records with scheduled completion date prior to today.
- **Custom Filter –** Launches the Custom Filter Wizard dialog that allows specific criteria to be setup to filter the database by. See the *Main Reports – Filter Wizard* section form more information.
- **Default Filter –** Removes custom filter and reapplies the default filter.
- **Show All Works Orders –** Removes all filters and returns every work order in the system.
- **Open All Dates –** Shows all work orders that have yet to be completed or closed.
- **On-Hold** – Filters the database to show all work orders with a status of 'on-hold', or waiting for some action to occur.
- **Set to Regenerate** – Shows all recurring types of work orders that have not regenerated, and do not have the 'Do Not Regenerate' flag set.
- **With Current Description** – This is based on the subject field of the currently selected work order.
    - **Show All Records** – Shows all work orders with the current subject text.

- Open Records Only – Shows all work orders with the current subject that still have an open status.
- Closed Records Only – Shows all work orders with the current subject, and have a status of Completed.
- Set to Regenerate – Shows all work orders with the current subject and do not have the ‘Do Not Regenerate’ flag set.

- **Assignments**
  - **Mechanics –** Filters the database by a selectable, assigned mechanic or employee.
  - **Assets/Machines –** Filters the database by a single, selectable, assigned machine or asset.
  - **Mechanics –** Filters the database by a selectable, assigned mechanic or employee.
  - **Classifications –** Filters the database by a selectable, assigned classification.
  - **Location –** Filters the database by a selectable, assigned location.

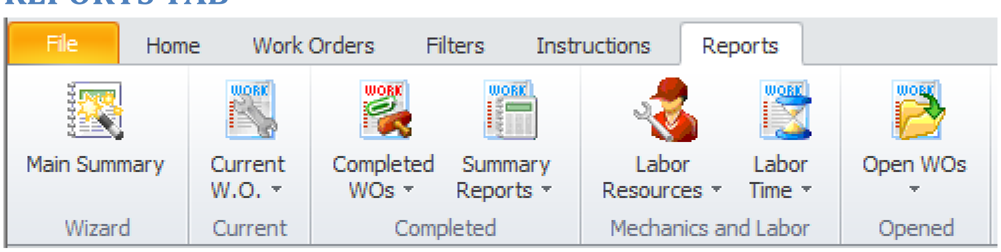
INSTRUCTIONS TAB



The following are the elements found on the **Instructions** tab:

- **Safety Instructions** – Allows for the creation and editing of the Safety Instructions database.
- **Recurring (PM) Instructions** – Allows for the creation and editing of the reusable, recurring tasks Instructions database.
- **Work and Comments** – Allows for the creation and editing of the work to be done/comments instructions database.

REPORTS TAB



The following are the elements found on the **Reports** tab:

- **Main Summary** – This report uses a Wizard that allows the user to setup the criteria to use for the report creation.
- **Current W.O. (Current Work Order)**

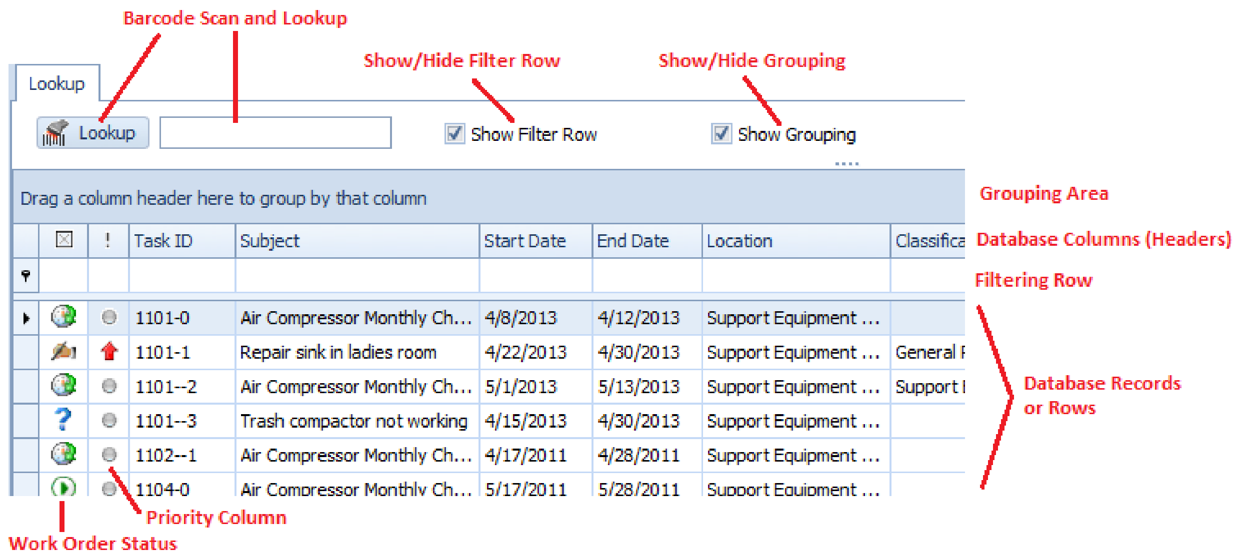
- **Work Order Details** – This report returns information on the currently selected work order, and can also be considered a status report.
- **Estimated Costs** – This report returns information to the estimated costs associated with the currently selected work order.

- **Completed WOs (Completed Work Orders)**
  - **Work Orders Costs** – This report uses a criteria selection wizard to return costs information on work orders of your choice. Also includes a chart to help present the information returned.
  - **Down Time Wizard** - This report uses a criteria selection wizard to return costs information on work orders of your choice. Also includes a chart to help present the information returned.
  - **Completion Analysis** – Using a date range, this report returns information on the percentage of work orders that were completed on-time, late, etc. Also includes a chart to help represent the information returned.
  - **Repair Codes** – This reports on a single asset and one or all associated repair codes.
- **Summary Reports**
  - **Equipment Summary** – This report uses a criteria selection wizard to return a summary of costs and downtime information. Also includes a chart to help present the information returned.
  - **Completion Summary**– This report uses a criteria selection wizard to return a summary of costs, labor and downtime information.
- **Labor Resources**
  - **Open by Mechanic** – This reports on all open work orders assigned to a single mechanic.
  - **Closed by Mechanic –** This reports on completed work orders for a date range and assigned to a single mechanic.
  - **Overdue by Mechanics** – This reports on all overdue work orders assigned to a single mechanic.
- **Labor Time**
  - **Projected Man Hours** – This reports on work orders projected time needed based on a date range, asset and/or mechanic.
  - **Actual Man Hours** – This reports on work orders actual time used based on a date range, asset and/or mechanic.
  - **Time Card Report** – This reports on information as collected with the *Time Tracker* feature.
- **Open WOs (Open Work Orders)**
  - **Open by Primary Asset -** This reports on all open work orders assigned to a single asset.
  - **Projected Costs**– This report uses a criteria selection wizard to return a summary of projected costs by category (labor, parts, etc.).
  - **Past Due Work Orders** – Reports on all work orders that have a scheduled completion earlier than today’s date and have a status of open.
  - **Open Work Requests** – Reports on all work orders with a status of Work Request.

Lookup Tab

This tab helps in locating work orders by grouping, filtering and sorting them. All the work orders in the current filter are located in the grid found here. To select a work order and make it the active record, the user needs only to click on the work order from within the grid. Once selected the user can click on the other tabs to view or edit the work order itself. Also note that double clicking on a work order will move you to the **Details** tab showing the selected record.

The following image illustrates the features available on the **Lookup** tab:

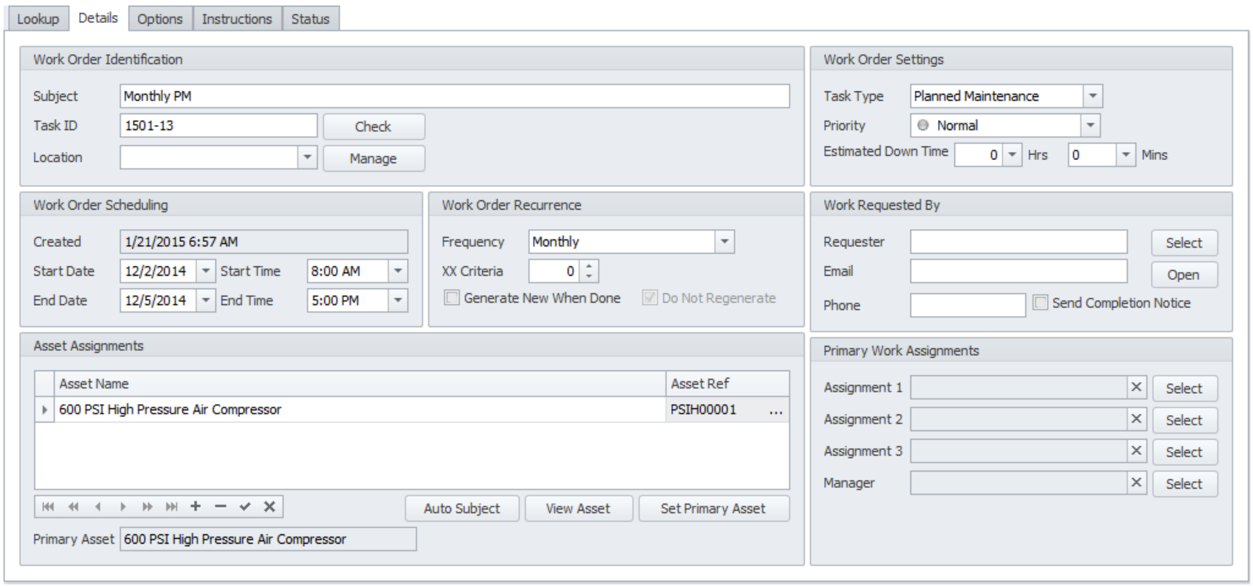


The functions of the **Lookup** tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab. Pay special attention to the following:

- Using the Lookup Grids
- Searching
- Scanned Lookups (Barcodes Support)

Details Tab

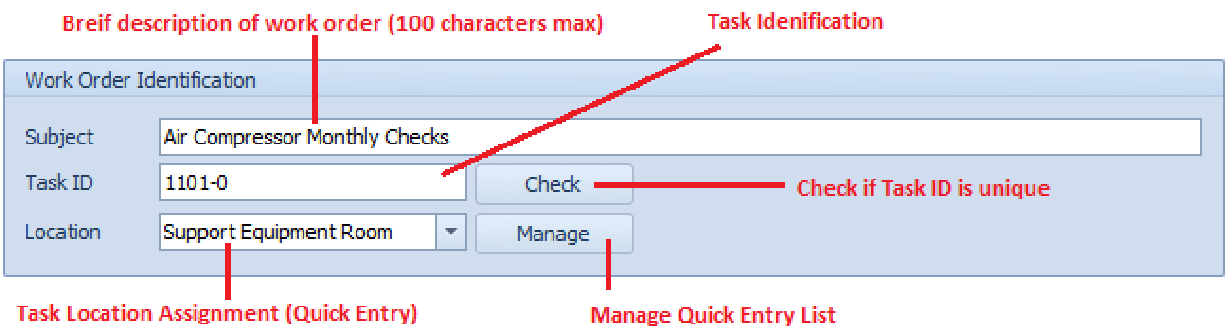
Under the Details tab you can setup your scheduling information, equipment, classification assignments, labor resources and other task specifics.



Work Order Identification

This section allows you to specify a subject for your work order, a task ID, and the location to be used in the execution of the work order.

The following image illustrates the elements of the section:



Subject

This field can contain up to 100 alpha/numeric characters. Used for identification purposes, this should provide a brief description of the work order as it relates to the work to be performed.

Task ID

This field can contain up to 20 alpha/numeric characters and is normally created for you by the application. It uses the following format: YYMM-###, where YY is the year of work order creation, MM for the month of creation, and ### a sequential number.

If wanted, this field can be overwritten, but this is not advised. Also having a unique ID is not enforced. However, to verify that it is unique you can click on the **Check** button adjacent to this field.

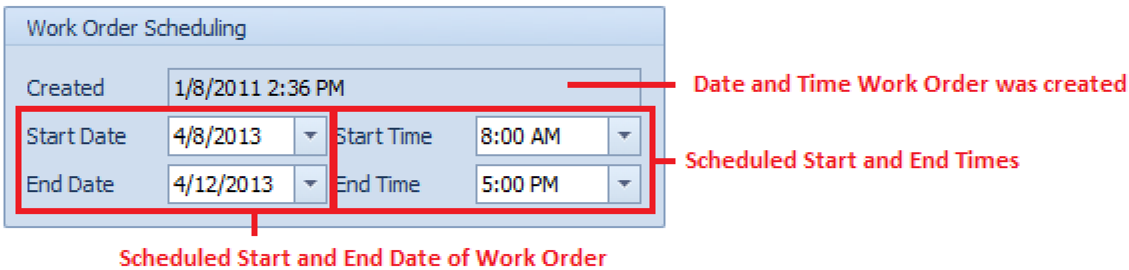
Location

This field can contain up to 50 alpha/numeric characters and is used to describe the physical location of where this work order is to be performed.

Work Order Scheduling

This area sets up the work order scheduling criteria. *This section needs not to be filled in manually when the work order has been assigned to a PM group.*

The following image illustrates the elements of this section:



Created

This is set to the date the work order was created, either by the user or automatically by the program as in the case of recurring work order types.

Start Date and Time

These values would indicate the Scheduled date and time you would like work to commence on the work order.

To set these values:

- Click on the down arrows attached to these fields.
- Click the value you want to use from the drop down list.

End Date and Time

These values would indicate the Scheduled date and time you would like work to be completed by.

To set these values:

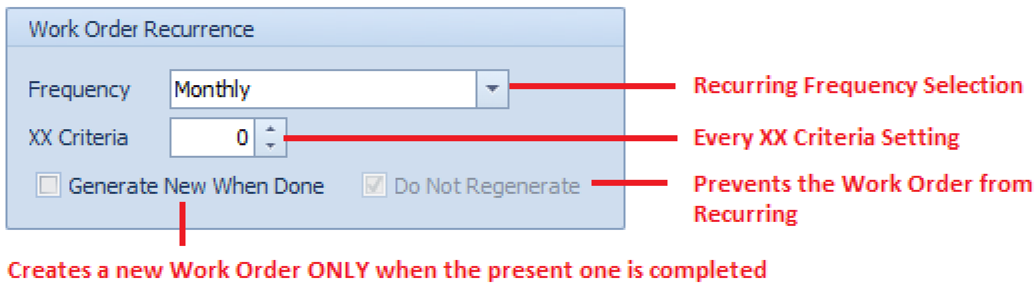
- Click on the down arrows attached to these fields.
- Click the value you want to use from the drop down list.

Work Order Recurrence

The information in this area needs to setup when the current work order is assigned as one of the available recurring types, such as a recurring PM for example.

Note: Like the Scheduling section, this information does not require manual setup if the work order has been assigned to a PM group.

The following image illustrates the elements of this section:



Frequency

This **Frequency** field allows you to specify the frequency at which the recurring work order will recreate (regenerate) itself.

To setup the **Frequency**:

- Click on the down arrow attached to this field.
- Click on the value you want to assign from those listed.

Available values are:

- None
- Every XX Meters (*see note below)
- Every XX Days
- XX Days (Mon-Fri)
- Daily
- Daily (Mon-Fri)
- Weekly
- Bi-Weekly
- Every XX Weeks
- Monthly
- Bi-Monthly
- Every XX Months
- Quarterly
- Semi-Annually
- Annually
- Every XX Years

Please refer to the section 'Scheduling by Meters' for more information when the' Every XX Meters' frequency is assigned.

XX Criteria

If the selected **Frequency** has **XX** anywhere in its description, the **XX Criteria** value must also be provided. This field only accepts numeric values.

To assign the **XX Criteria** value, please do one of the following:

- Click the up arrow to increase the value here.
- Click the down arrow to decrease the value here.
- Click and type in your value in the space provided.

*The value entered here replaces the 'XX' criteria of the selected frequency. For example, if you have a Frequency of 'Every XX Meters' selected, and you enter '3000' for the **XX Criteria**, the work order would regenerate 'Every 3000 Meters'.*

Generate New When Done

When this value is set, the program will not generate a new work order until the current work order is marked as completed.

To set the **Generate New When Done** flag:

- Place a checkmark in the **Generate New When Done** checkbox.

Note about using this option: When this option is used, the selected recurring frequency value will be added to the work order's completion date. For an example: If you have a recurring frequency set for 'Every 10 Days', and the work order has a completion date of the 10th of the month, the newly generated work order would have a scheduled start date of the 20th (Completion Date + 10).

*Using the example above, and the **Generate New When Done** is not used, the newly generated work order would have a scheduled start date of 10 days in the future of the current work order's 'scheduled start date' (not the completion date), regardless if the current work order is completed or not.*

Do Not Regenerate

For recurring types of work order, setting this value will prevent the program from regenerating the work order at the set frequency. Also be aware that as the program executes one of the built-in regeneration routines, it will automatically set this flag. This basically does two things:

- It tells the application and the user that the work order has already regenerated itself and a new one should already be present in the database.
- It prevents the program from regenerating the 'same' work order again. Thereby preventing possible duplicates from being created.

To manually change the **Do Not Regenerate** value (***Allowed but not recommended***):

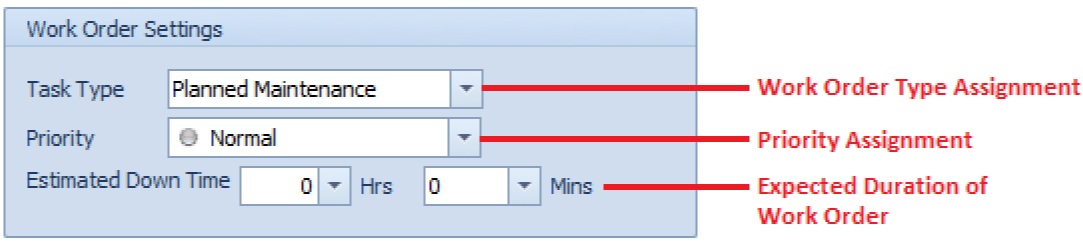
- Move to the **Work Orders** tab in the ribbon.
- Click on the **Recur** option to expand the drop down.

- Click **Change 'Do Not Regenerate' flag**.
- Click **Yes** to the prompt.

Work Order Settings

The section allows you to setup the **Task Type** of the work order, the priority indicator, and the estimated downtime.

The following image illustrates the elements of the section:



Task Type (Work Order Type Assignment)

There are 12 possible task types available, with 10 of these having user definable titles. Five of these task types are designated as recurring types of work orders, where the others are designated as repair, or one-time work orders types. See the ***Work Orders Setup*** section in this chapter for more information.

To assign a **Task Type** to your work order:

- Click on the down arrow attached to this field.
- Click on the value you want to assign from those listed.

Note that the top 5 task types listed are recurring types, with the remaining types being one-time or repair types.

Priority

You can assign your work orders a priority indicator. Options include: Urgent, High, Normal and Low.

To assign a **Priority** to your work order:

- Click on the down arrow attached to this field.
- Click on the value you want to assign from those listed.

Estimated Down Time

You can record the estimated time you feel will be needed to completed a work order. This information shows on the work order itself, and can be used with reports.

To assign the **Estimated Down Time** for your work order:

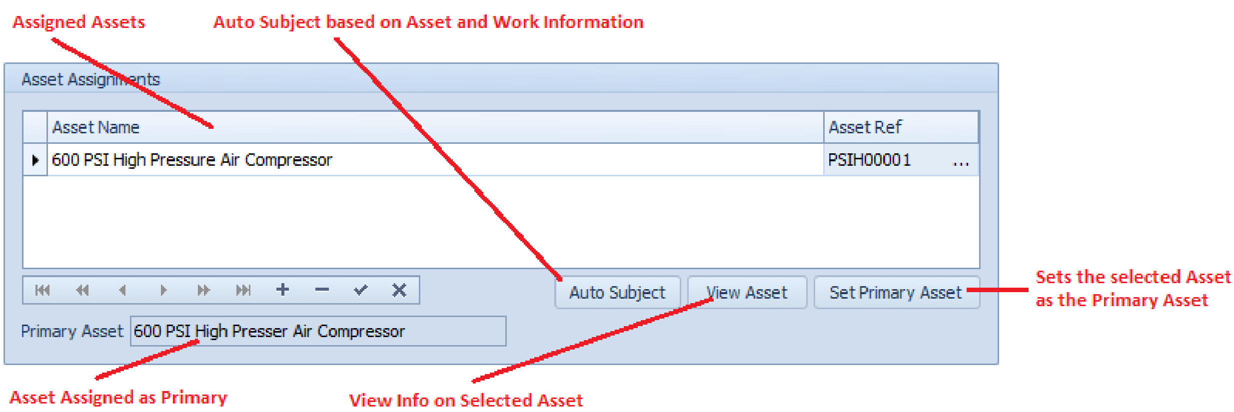
- Click on the down arrows adjacent to the **HRS** and **MINS** fields.

- Click on the value you want to assign from those listed.

Assigned Assets

You can assign an unlimited number of assets to a work order. However, only one of these will be used as the **Primary Asset**. Most of the available reports will be based on the **Primary** assignment.

The following image illustrates the elements of this section:



To assign an asset to the work order:

- Move to the **Assigned Assets** section and click on the **+** (plus sign) in the data control found there.
- From the invoked lookup dialog, click on the asset record you want to assign.
- Click on the **Select** button.
- Click the **Post (check)** button in the Assets' data control.

To set which asset to assign as the primary asset:

- Select the asset you want to assign from those listed in the grid.
- Click the **Set Primary Asset** button.
- Click **Yes** to the prompt about setting the primary asset.
- The asset should be displayed in the **Primary Asset** field.

To remove an asset from the current work order:

- Click on the asset you want to remove from those listed.
- Click on **Remove (minus sign)** button in the Assets' data control.
- When prompted about the removable, click on the **Yes** button.
- Click the **Post (check)** button in the Assets' data control.

To use the Auto Subject feature in this section:

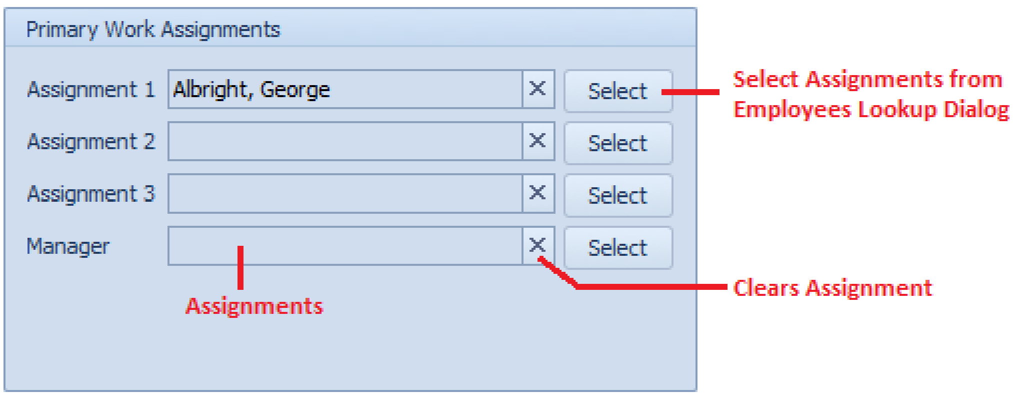
- Click on the **Auto Subject** button found in this area.
- When prompted about accepting this new **Subject** title, click **OK**.

The auto subject feature combines the assigned work type with information about the assigned primary asset to create a **Subject** title for the current work order, replacing any existing title.

Primary Work Assignments

The **Primary Work Assignments** section allows you to assign 3 employees or mechanics, and one Manager to the current work order. These resources will be shown on the printed document, and also used with the **Auto Email** of work orders.

The following image illustrates the elements of this section:

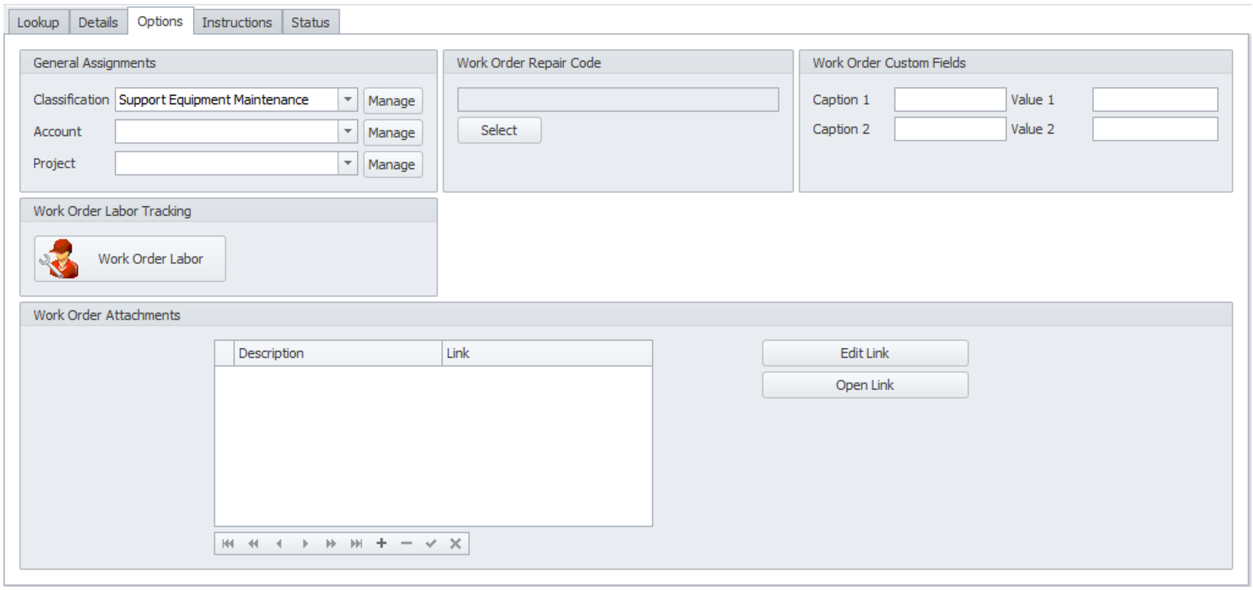


To assign mechanics or employees to the work order:

- Move to and click on the **Select** button adjacent to the Assignment field you want to assign an employee to.
- From the invoked lookup dialog select the record you want to assign from those displayed.
- Click on the **Select** button.
- Repeat the above steps for each assignment you want to make, including the Manager field.

Options Tab

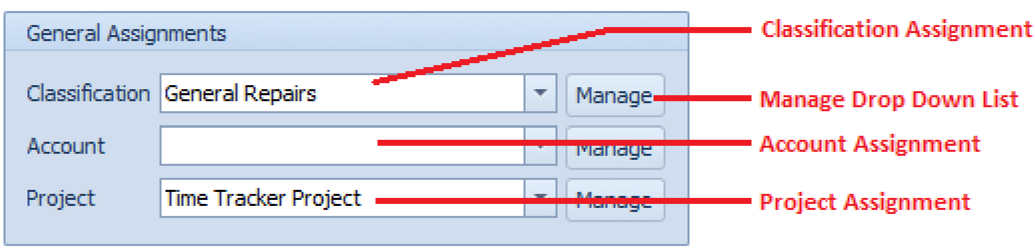
The **Options** tab allows you to continue making general assignments to the current work order. Some of the possible assignments are vendors and contractor, auto email features, email list, add attachments and more.



General Assignments

This section allows you make some general type assignment to your work order. These assignments help with the creation of reports.

The following image illustrates the elements of this section:



To make the assignments in this section:

- Move to the appropriate field and click on the down arrow on the drop down list.
- Make your selection by clicking on it.

Work Order Repair Code

With ***Repair Codes*** you can have both universal codes, and machine specific codes. With the universal codes you can assign the same code to every work order regardless of the machine assignment. Examples here may be Normal Maintenance, Scheduled Downtime, etc.

Machine specific codes can be more specific to what was done, and the list will change according to the **primary asset** assigned to the work order. Examples here could be Main Motor Replacement, Brushes

Changed, Main CAM replaced etc. Machine specific **repair codes** can be used for predictive maintenance type reports where you can see trends develop and scheduled preventive maintenance accordingly.

The following image illustrates the elements of this section:

Assign a Repair Code

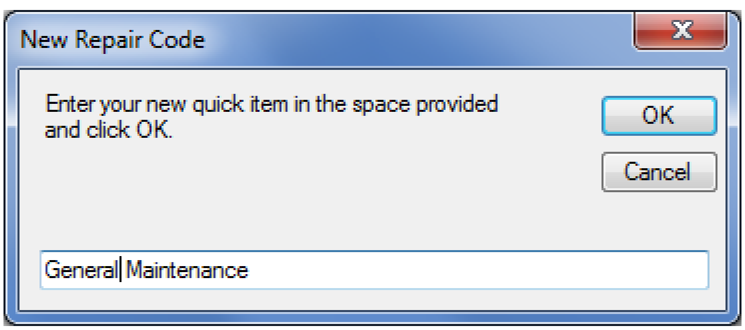
To assign a ***Repair Code***:

- Move to the **Work Order Repair Code** section as found on the **Options** tab.
- Click on the **Select** button.
- Move to the grid and select the repair code you want to use by clicking on it.
- Click on the **Select** button.

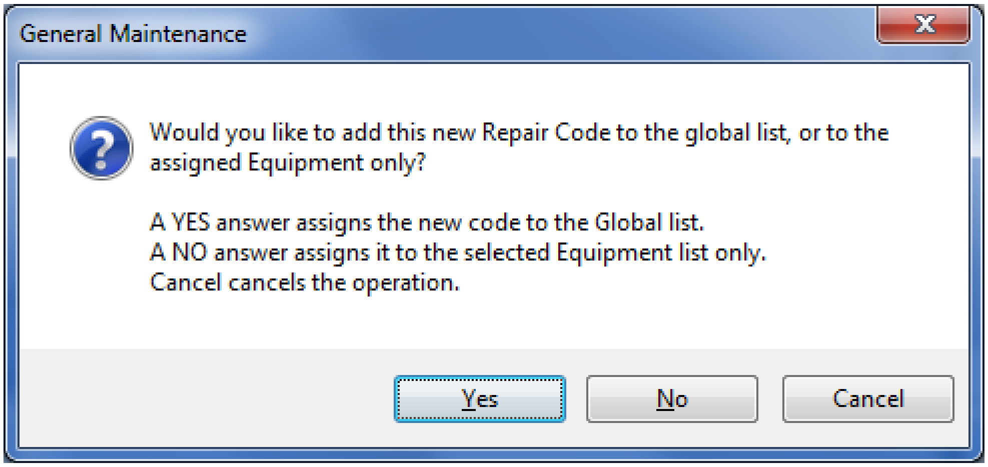
Creating New Repair Codes

To add new items to the **Repair Codes** List:

- Select the work order you want to add a repair code to.
- Move to the **Work Order Repair Code** section as found on the **Options** tab.
- Click on the **Select** button.
- Move to the data control located below the grid and click on the **Append** (+) button.



- From the invoked ***New Repair Code*** dialog, type in the title of the new code in the space provided. This description can contain up to 40 alpha/numeric characters.
- Click the **OK** button.

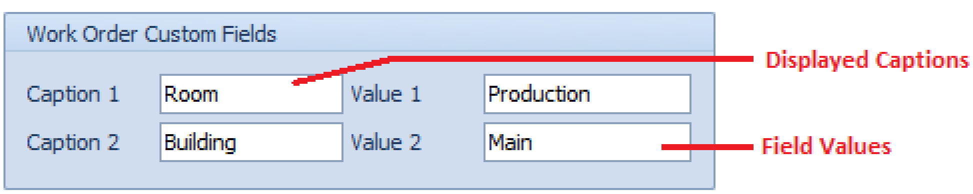


- When prompted about adding the code to either the global list, or the assigned equipment only list, click on the appropriate button to make your assignment.

Work Order Custom Fields

You can specify two user defined fields to be included or printed with your work orders. These include both the field's caption, and the contents or value of that field.

The following image illustrates the elements of this section:



To setup your special fields:

- Move to the **Options** tab in the ***Main Scheduler***.
- Move to the **Work Orders Custom Fields** section and type in the appropriate information for that field.

You can setup the default captions for these fields using the ***Work Orders Setup*** routines. Alternately, you can also toggle the use of these fields.

Labor Resources

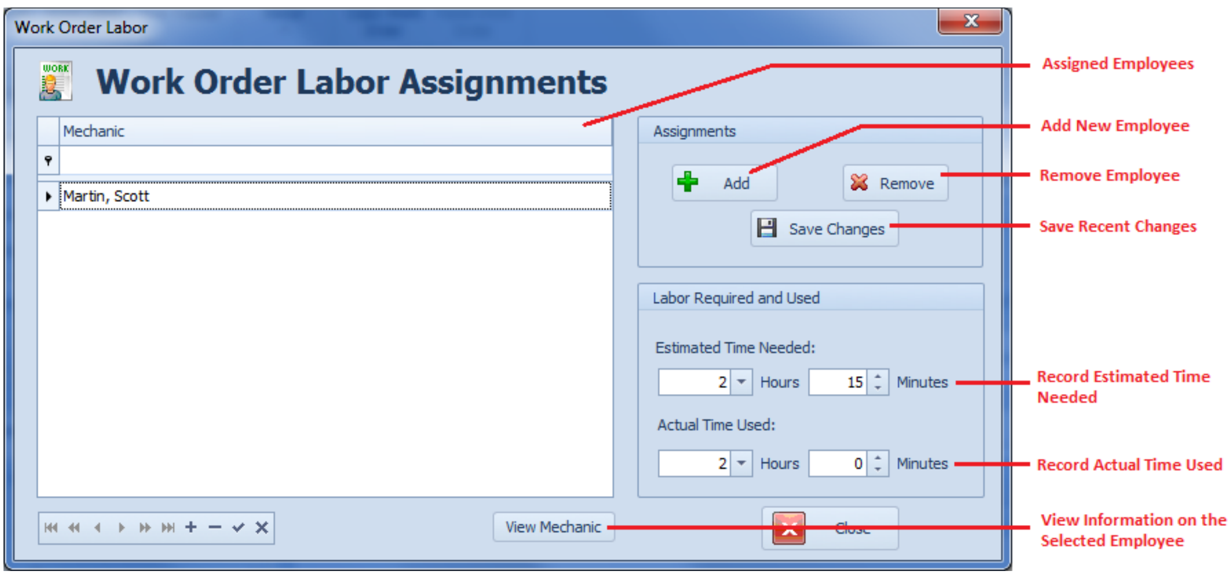
You can assign as many mechanics or employees as required to a work order. Those assigned here differ from the three possible assignments made in the ***Primary Assignments*** section. The resources here will be used in the calculation of the total work order costs and time management. Whereas the others appear on the work orders assignments section, used in conjunction with the **Auto-Email** feature and can be used by various filters and reports. It is perfectly acceptable and recommended to use both employee assignments when possible.

To assign Labor Resources to a work order

- Move to the **Options** tab in the *Maintenance Scheduler* module.
- Move to the **Resources** tab, located within the **Options** tab.
- Click in the **Labor Resources** button.

Or

- Move to the **Work Orders** tab in the ribbon and click on the **Work Labor** option.



- Move to and click on the **Add** button in the **Assignments** group.
- From the invoked ***Employees Database*** lookup dialog, select the employee you want to add from those listed in the grid.
- Click on the **Select** button.
- Click **Save Changes** button.

To assign Estimated Time Needed

- Select the employee you want to make the assignment to from those listed in grid.
- Move to the **Estimated Time Needed** area and edit the information found there.
- Click on the **Save Changes** button.

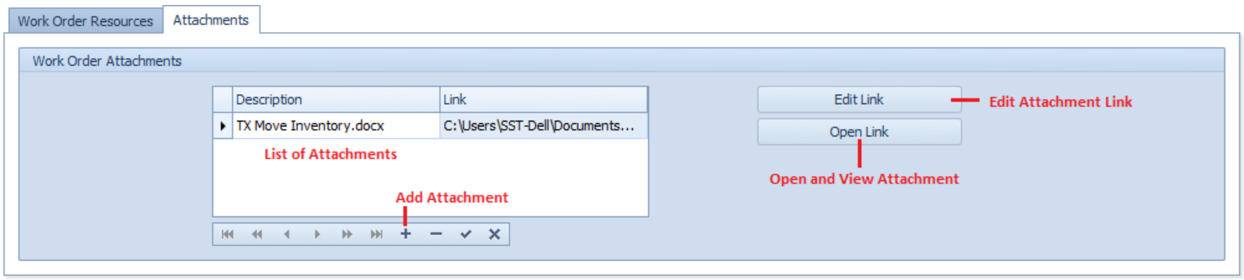
To record Actual Time Used

- Select the employee you want to make the assignment to from those listed in grid.
- Move to the **Actual Time Used** area and edit the information found there.
- Click on the **Save Changes** button.

Work Order Attachments

Work Orders found in this module support the attachments feature. For more information about attachments please refer to the ***Attachments*** section of the ***Common Features*** chapter.

The following illustration outlines the elements of this section:



To access the Attachments:

- Move to the **Options** tab in the ***Main Scheduler***.
- Move to the **Attachments** tab, which is located within the **Options** tab.

Instructions Tab

The **Instructions** tab is used to assign and edit instructions used by your work orders. For recurring types of work orders these instructions are assigned from lists of predefined instructions. For repair types of work orders, these instructions are created as needed.

Safety Instructions

This section allows you to specify the safety instructions to be used by the currently selected work order. These instructions can also be semi-automatically assigned for you when assigning an asset to a work order and this asset has been assigned '**Default' Safety Instructions**.

The following illustration shows the elements of this section.

To assign Safety Instructions to the current work order

- Select the work order you want to assign instructions to.
- Move to the **Instructions** tab.
- Move to the **Safety Instructions** group and click on the **Select** button.
- From the *Instructions Lookup* dialog, select the instructions you want to assign from those listed in the grid.

- Click on the **Select** button.

To view or edit these assigned instructions:

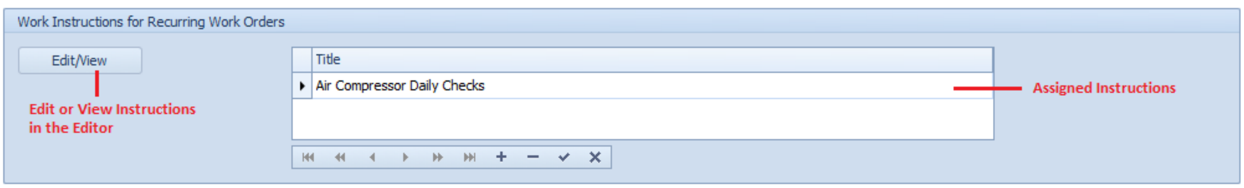
- Move to the **Safety Instructions** group and click on the **Edit** button.
- This will open the instructions with the *Repair Procedures Editor.*

IMPORTANT NOTE: Editing the assigned instructions will not only apply to this work order, but every work order in the system assigned to use these instructions.

Work Instructions for Recurring Work Orders

This section allows you to assign as many sets of predefined instructions as may be required to the currently selected, **recurring** type of work order.

The following illustration shows the elements of this section.



To Add instruction to a Recurring Work Order

- Select the work order you want to assign instructions to.
- Move to the **Instructions** tab.
- Move to the **Work Instructions for Recurring Work Orders** group.
- Move and click on the **+** (plus sign) in the data control found there.
- From the invoked lookup dialog, select the instructions you want to assign from those listed in the grid.
- Click on the **Select** button.
- Click the **Post (check)** button in the Instructions data control.

To view or edit these assigned instructions

- Move to the **Work Instructions for Recurring Work Orders** group and select the instructions your want to view.
- Click on the **Edit/View** button.
- This will open the instructions with the *Repair Procedures Editor.*

IMPORTANT NOTE: Editing the assigned instructions will not only apply to this work order, but every work order in the system assigned to use these instructions.

To remove Instructions from the current Work Order

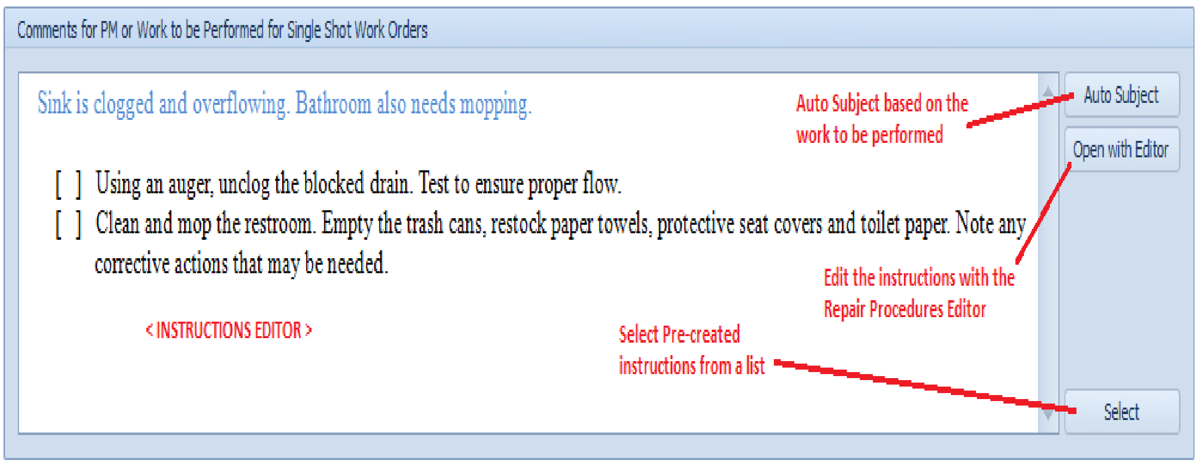
- Move to the **Work Instructions for Recurring Work Orders** group and select the instructions your want to remove.

- Click on the **Remove (minus sign)** button in the data control.
- When prompted about the removable, click on the **Yes** button.
- Click the **Post (check)** button in the data control.

Comments for PMS or Work to be Performed for Single Shot Work Orders

This section allows you to assign and edit comments for PMs, and create tasks instructions to be used with Repair types of work orders. For Repair types of work orders, this is the **Work to be Performed** section.

The following illustration shows the elements of this section.



To edit repair instructions or comments

- Select the work order you want to edit instructions for.
- Move to the **Instructions** tab.
- Move to the **Comments for PM or Work to be Performed for Single Shot Work Orders** group.
- Perform one of the following:
  - Type in your instructions or comments in the editor found here.
  - Click on the **Open with Editor** to edit your instructions or comments with the invoked ***Repair Procedures Editor***, clicking on the **Save and Close** button in the ribbon when done.
  - Click on the **Select** button in this area. From the invoked lookup dialog, select the instructions you want to assign from those listed in the grid and then click on the **Select** button.

To use the Auto Subject feature in this section:

- Click on the **Auto Subject** button found in this area.
- When prompted about accepting this new subject title, click **OK**.

This auto subject is based on the Work to be Performed text as entered in the section editor.

Working with the Instructions Databases

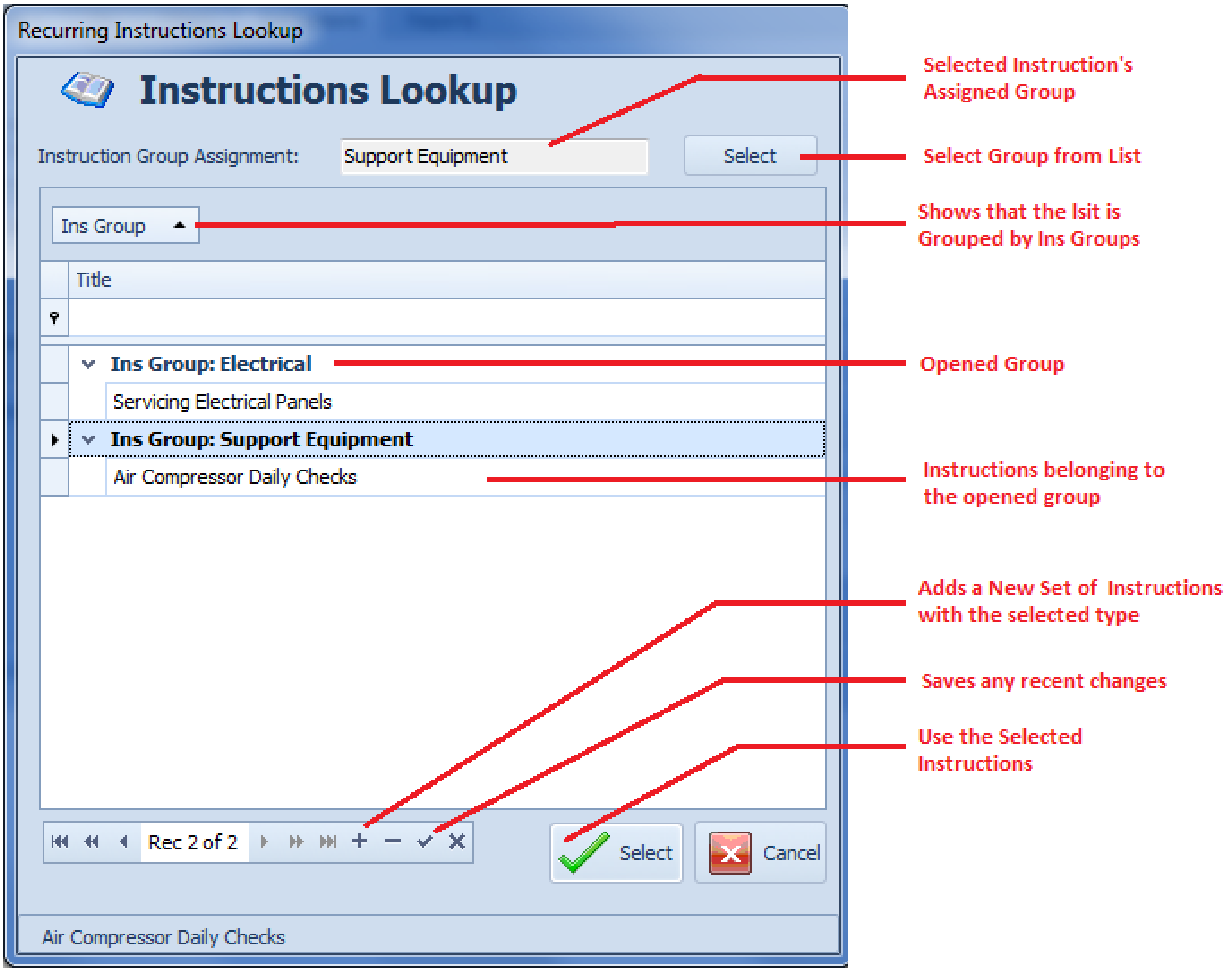
The **Instructions Database** is used to store reusable task instructions. This is useful when you want to reuse the same set of instructions for various machines, and with recurring work orders. For example, let's say you have a common gearbox that is used throughout your facility. It only makes sense to reuse the same set of instructions for all of these gearboxes, instead of rewriting them for each individual item.

Adding New Instructions to the Database

To add new instructions to the instructions database:

- Move to the ribbon control and click on the **Instructions** tab.
- Click on the option that best describes the type of instructions you want to create.
    - **Safety Instructions** – These instructions would outline work order safety guidelines and could be assigned to any work order type.
    - **Recurring (PM) Instructions** – These instructions would be used to outline the tasks to be performed in the execution of planned maintenance tasks.
    - **Work and Comments** – These instructions or comments would be used in the **Comments for PM or Work to be Performed for Single Shot Work Orders** section.
- From the invoked ***Instructions Lookup*** dialog, move to and click on the **+** (plus sign) in the data control found there.
- From the invoked ***New Instructions*** dialog box, move to the space provided and type a descriptive name for your instructions. This field will accept up to 50 alpha/numeric characters.
- Click on the **OK** button.
- Next you will be prompt as to whether to assign the new instructions to a group. Group assignments will help streamline item lookup later. To add the instructions to a group.
    - Click the **Yes** button to the prompt about adding the group.
    - Select the group you want to use from those listed and click on the **Accept** button.
- Next you will be given the chance to edit the actual instructions when the ***Repair Procedures Editor*** loads.
- Edit your instructions, clicking on the **Save and Close** button when done.

The following illustrates the elements found on the ***Instructions Lookup*** dialog:



Renaming Instructions Titles

To rename a set of Instructions' Title:

- From the ***Instructions Lookup*** dialog, move to the list of available instructions and click in the grid that contains the instructions you want to edit the title on.
- Edit the information from within the grid.
- Click on Post/Save Changes (**checkmark**) in the data control.

Assigning Instructions to a Group

- From the ***Instructions Lookup*** dialog, move to the list of available instructions and click in the grid that contains the instructions you want to assign a group to.
- Move to the Instruction **Group Assignment** section and click on the **Select** button.
- Select the assignment you want to use from those listed.
- Click on the **Accept** button to assign the group.
- Click on Post/Save Changes (**checkmark**) in the data control.

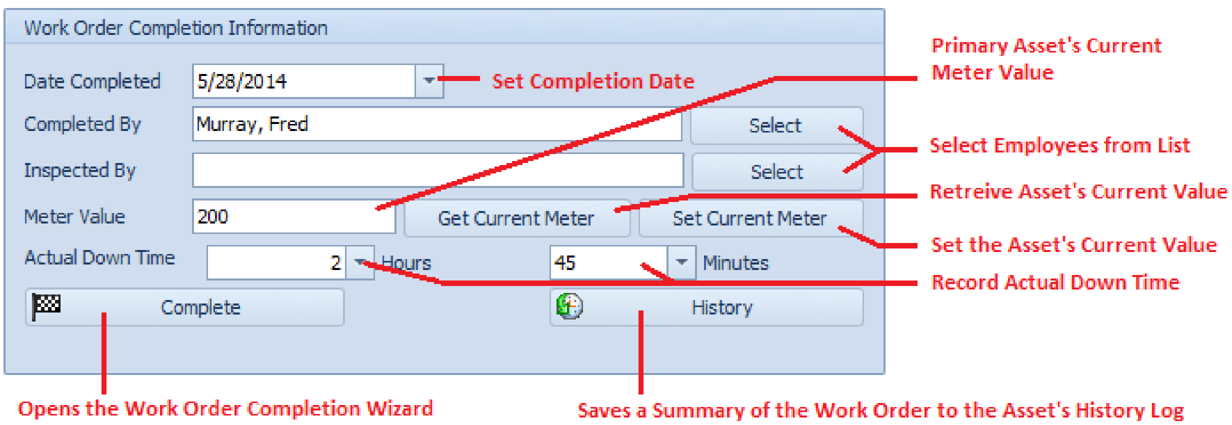
Status Tab

On the **Status** tab you will set the current status of your work orders, record costs information, record completion information and more. In this section we will explore the features found on this tab.

Work Order Completion Information

This section allows you to record completion information as it relates to the currently selected work order.

The following illustrates the elements found in this section:

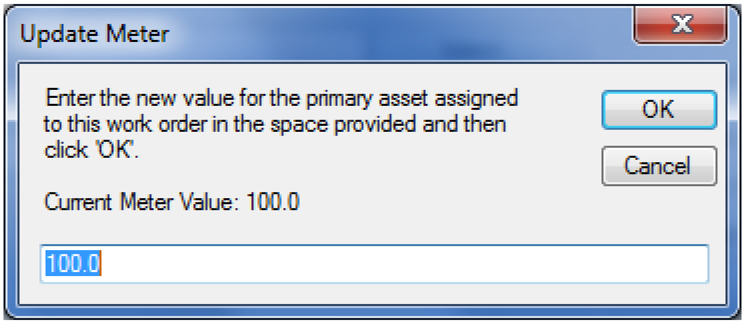


- **Date Completed** – Use the drop down calendar adjacent to this field to set the date the work order status was changed to 'Completed'.
- **Completed By** – Use the **Select** button adjacent to this field to assign an employee to this field.
- **Inspected By** – Use the **Select** button adjacent to this field to assign an employee to this field.
- **Meter Value** – This field would indicate the meter value, if applicable, of the primary asset at the time the work order was completed.
- **Get Current Meter** – Clicking this button will cause the program to read the Primary Asset's record and retrieve its current meter value and insert it in to the **Meter Value** field.
- **Set Current Meter** – Clicking this button will allow you to both update the **Meter Value** field, and update the **Primary Asset's** meter value in the **Assets database**.
- **Actual Down Time** – Use the **Hours** and **Minutes** fields found here to record the actual time it took to complete the selected work order.
- **Complete** – Clicking this button will invoke the built in ***Work Order Completion*** wizard that will step you through the completion process.
- **History** – Clicking this button will save a summary of the completed work order to **Primary's Asset History Log.**

Note on the History option. You should complete all other completion information prior to saving to history, as much of this information will be written to the asset's log.

Set Current Meter Value

To both assign an Asset's meter to the current work order, and simultaneously update the value of the actual primary asset:



- From the **Status** tab of the ***Main Scheduler***, move to the **Work Order Completion Information** group.
- Click on the **Set Current Meter** button.
- Enter the new meter value in the space provided and then click **OK**.

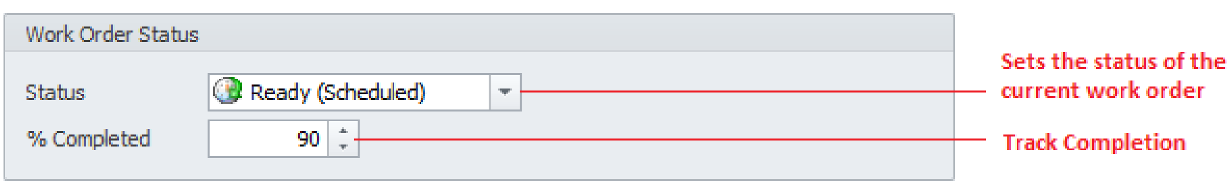
Actual Down Time

To record the actual time used to completed a work order.

- From the **Status** tab of the ***Main Scheduler***, move to the **Work Order Completion Information** group.
- Click on the down arrows adjacent to the **HRS** and **MINS** fields.
- Click on the values you want to assign from those listed.

Work Order Status

The following illustrates the elements found in this section:



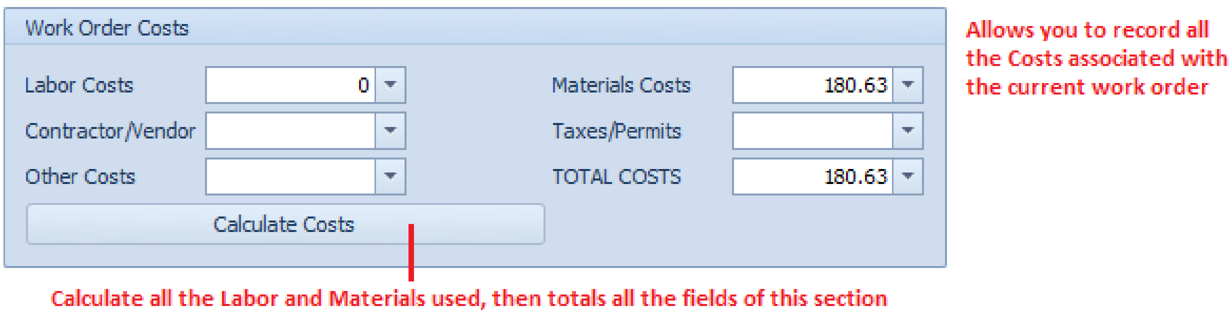
To change the Status of the current work order

- From the **Status** tab of the ***Main Scheduler***, move to the **Work Order Status** group.
- Select the status indicator your want to assign from the drop down list. Available options include:
  - New Request
  - Waiting Approval
  - Waiting on Parts
  - Waiting on Labor

  - Waiting on Production
  - Waiting on Contractor
  - On Hold (General)
  - Ready
  - In-Progress
  - Completed
  - Disapproved
- Move to the **% Completed** field and to record this information.

Work Order Costs

This section allows you to record the costs associated with the selected work order, as shown in the following illustration.



You record your information by moving to the various fields and clicking on the down arrow keys to access the attached calculators. Then edit the assigned values. These fields only accept numeric information.

Calculate Costs

The **Calculate Costs** feature performs the following functions:

- It searches the assigned ***Material Resources*** database and then multiplies each assigned part with the Quantity Used by its unit price (*Quantity Used X Unit Price*). It then adds these values together to return a total **Materials Costs**.
- If searches the assigned ***Labor Resources*** database and then multiples each assigned employee's hourly rate by the hours worked (*Hourly Rate X Hours Worked*). It then adds these values together to return a total **Labor Costs**.
- It takes the total values collected above and then adds them to the **Contractors/Vendor** field, **Taxes/Permits** field, and **Other Costs** fields, applying the result to the **Total Costs** field.

To calculate the work order's total costs

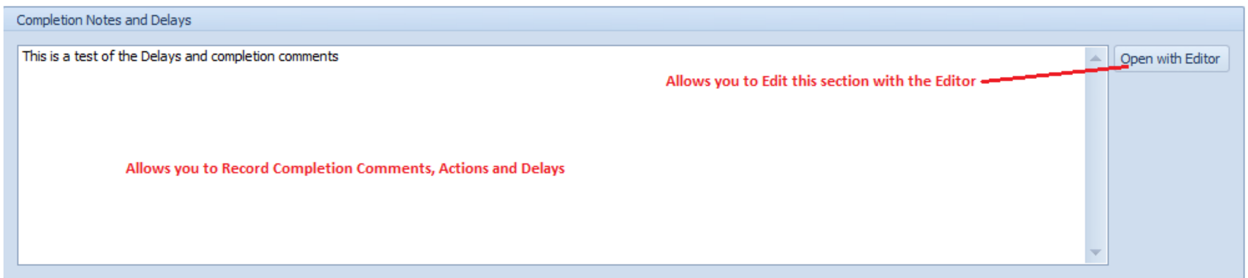
- Record and edit the assigned ***Material Resources*** and ***Labor Resources*** databases.
- From the **Status** tab of the ***Main Scheduler***, move to the **Work Order Costs** group.

- Edit the **Contractors/Vendor**, **Taxes/Permits** and **Other Costs** fields with the values you want to assign.
- Click on the **Calculate Costs** button.

NOTE: When the Calculate Costs buttons is activated, the values assigned to the Material Costs, Labors Costs and Total Costs fields may be replaced with new values.

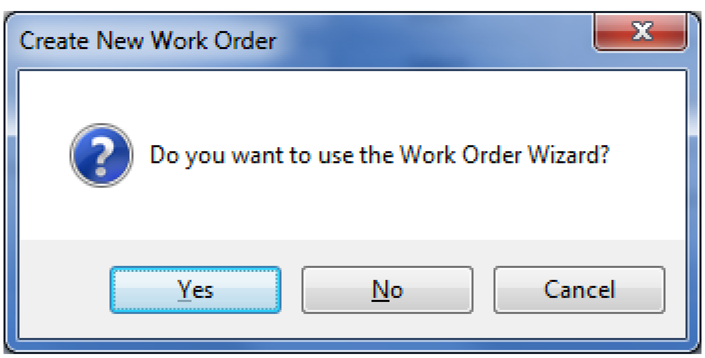
Completion Notes and Delays

Use the editor found in this area to record any information as it applies to completion notes and delays. You can also click on the **Open with Editor** button to edit this information with a text editor.



Add New Work Order

To add a new work order:



- Move to the ***Main Scheduler***.
- Move to the **Home** tab in the ribbon and click on the **Add New** button.
- When prompted about the operation, click on the response of your choice.
    - **Yes** – Launches the ***Work Order Wizard*** that steps you through the creation process. This wizard will be explained following the next section.
    - **No** – Creates a new work and returns you to the ***Main Scheduler*** where you can move through the various tabs editing and adding information as necessary.
    - **Cancel** – Backs out of the creation process.

Save Changes

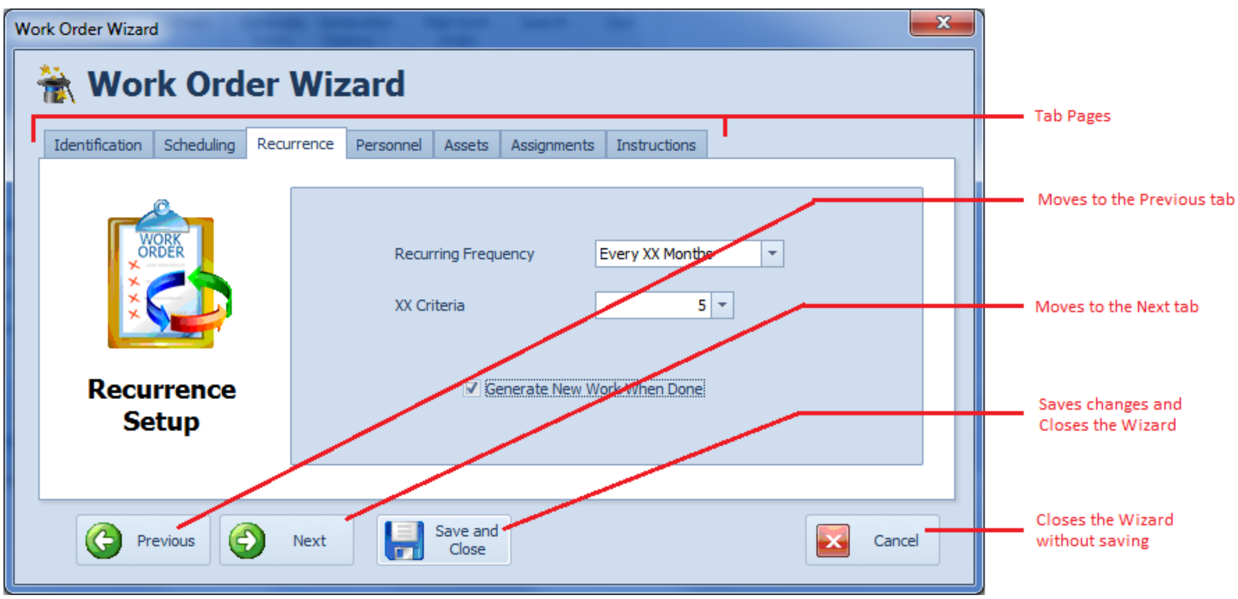
To save changes to the main work order record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's ***Quick Access*** toolbar.

To save changes to the main work order record and all the underlying records (assets, attachments, etc.), click on the **Save Changes** button found on the **Home** tab of the ribbon control.

Work Order Wizard

The ***Work Order Wizard*** when accessed from the ***Main Scheduler*** will help ease in the work order creation process by stepping you through the process. This wizard is also accessible from the ***Work Orders Planner*** and the ***Work Orders Calendar*** where it is use to edit, or reschedule pre-existing work orders.

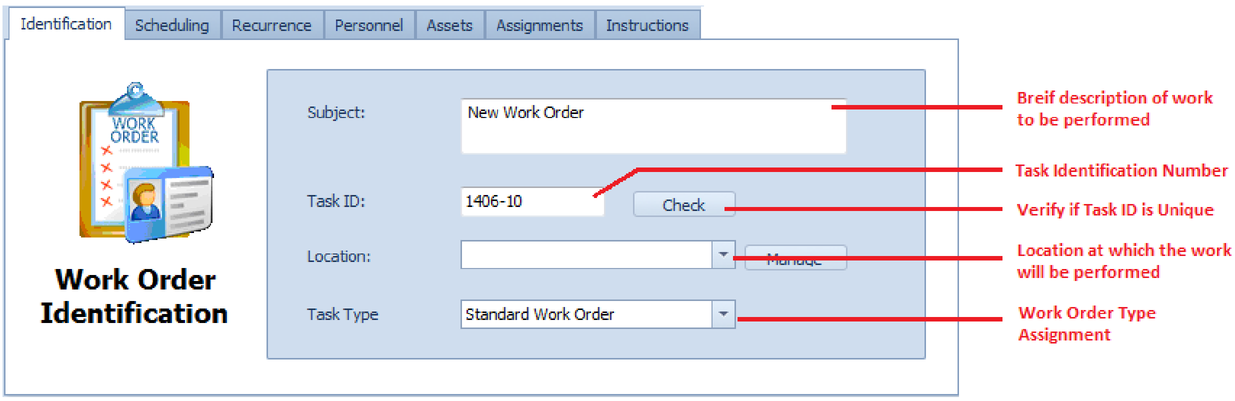
The following illustration shows the general or shared features of the Wizard:



- **Tab Pages –** This is a logical way of grouping controls by function.
- **Previous** – Clicking this button moves you to the previous tab.
- **Next** – Clicking this button moves you to the next available tab.
- **Save and Close** – Clicking this button saves any changes you may have made, and closes the Wizard.
- **Cancel** – Clicking this button closes the wizard without applying any changes made.

Wizard Identification Tab

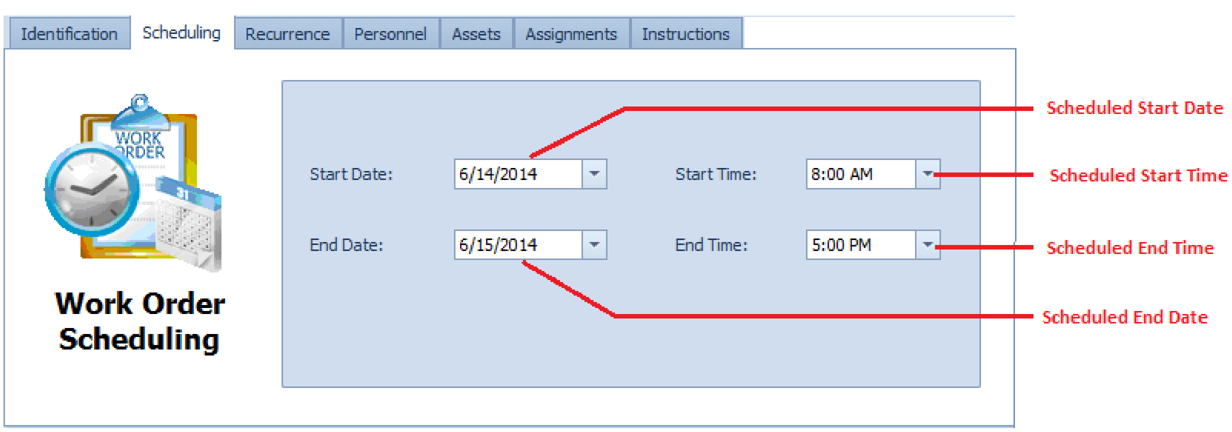
The following illustration shows the elements on this tab:



- **Subject** – This is a brief description of the work order. It can contain up to 100 alpha/numeric characters.
- **Task ID** – This is generated for you by the program. You are allowed to edit this value, but it is not recommended.
- **Check** – This checks to ensure that the supplied **Task ID** is unique in the database. If it was generated by the program then is already known to be unique.
- **Location** – This specifies the location at which the work order will be performed, and is selectable from the drop down list.
- **Task Type** - There are 12 possible **task types** available, with 10 of these utilizing user definable titles. Five of these **task types** are designated as recurring types of work orders, where the others are designated as repair, or one-time work orders types. See the ***Work Orders Setup*** section in this chapter for more information. Make your assignment by selecting the **Task Type** from the drop down list.

Wizard Scheduling Tab

The following illustration shows the elements on this tab:



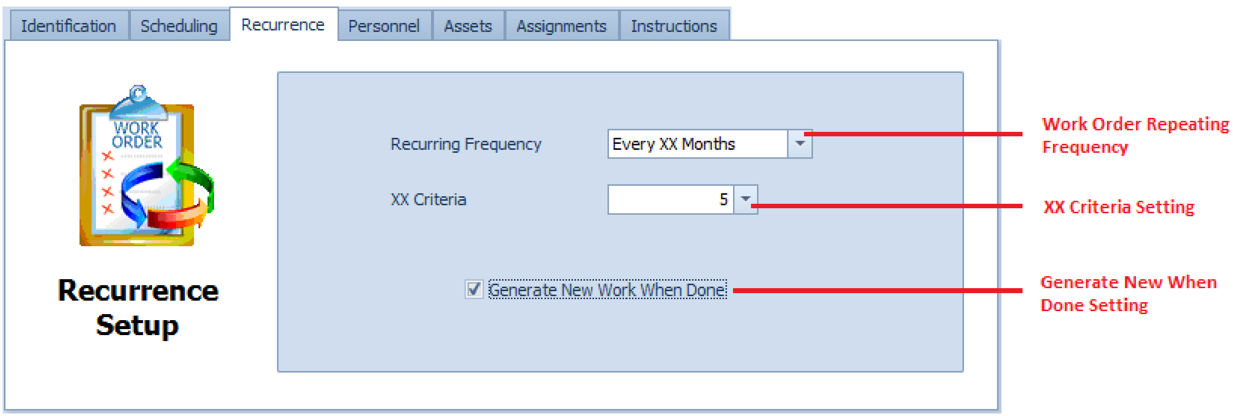
- **Start Date** – Selectable from the drop down calendar, this field represents the scheduled **Start Date** of the work order.
- **Start Time** – Selectable from the drop down list, this field represents the scheduled **Start Time** of the work order.

- **End Date** – Selectable from the drop down calendar, this field represents the scheduled **End Date** of the work order.
- **End Time** – Selectable from the drop down list, this field represents the scheduled **End Time** of the work order.

Wizard Recurrence Tab

The **Recurrence** tab only applies if the current task type has been assigned as one of the recurring types. If it is not a recurring task type, the features on this tab will be disabled.

The following illustration shows the elements on this tab:

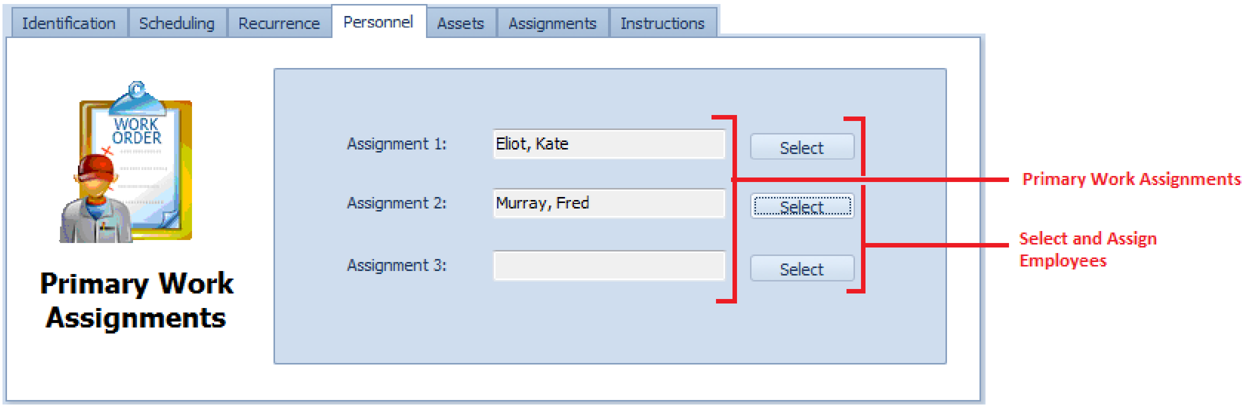


- **Recurring Frequency** - This field allows you to specify the frequency at which the recurring work order will recreate (regenerate) itself. To setup the Frequency:
    - Click on the down arrow attached to this field.
    - Click on the value you want to assign from those listed.
- **XX Criteria** - If the selected **Recurring Frequency** has XX anywhere in its description, the **XX Criteria** value must also be provided. To assign the **XX Criteria** value, please do the following:
    - Click the up or down arrows to increase or decrease the value here.
- **Generate New When Done** - When this value is set, the program will not generate a new work order until the current work order is marked as completed. To set the **Generate New When Done** flag:
    - Place a checkmark in the **Generate New When Done** checkbox.

Note about XX Criteria. The value entered here replaces the 'XX' criteria of the selected frequency. For example, if you have a Frequency of 'Every XX Months' selected, and you enter '5' for the XX Criteria, the work order would regenerate 'Every 5 Months'.

Wizard Personnel Tab

The following illustration shows the elements on this tab:



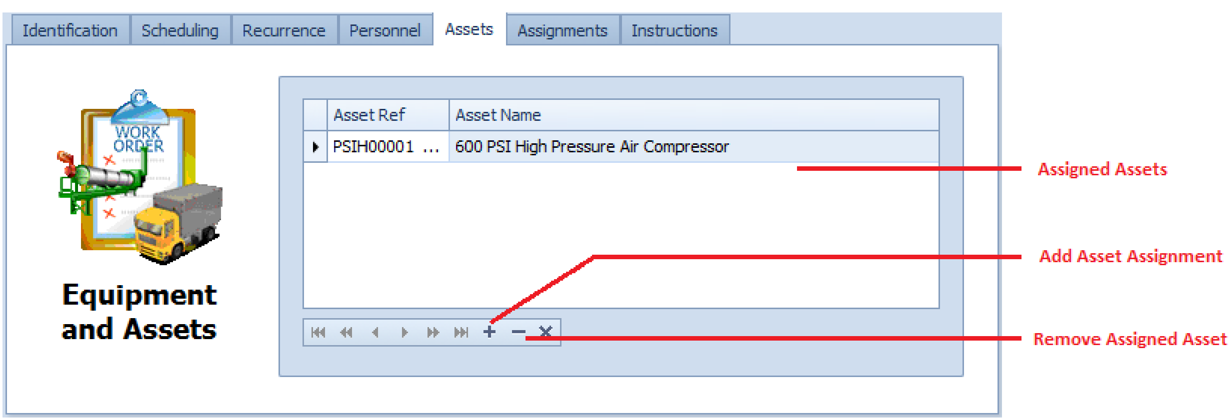
The **Primary Work Assignment** section allows you to assign 3 employees or mechanics to the current work order. These assignment show in the header section of work orders, and are also used with the **Auto Work Order Email** feature.

To assign mechanics or employees to the work order:

- Move to and click on the **Select** button adjacent to the **Assignment** field you want to assign an employee to.
- From the invoked lookup dialog select the record you want to assign from those displayed.
- Click on the **Select** button.
- Repeat the above steps for each assignment you want to make.

Wizard Assets Tab

You can assign an unlimited number of assets to a work order. The following image illustrates the elements of this section:



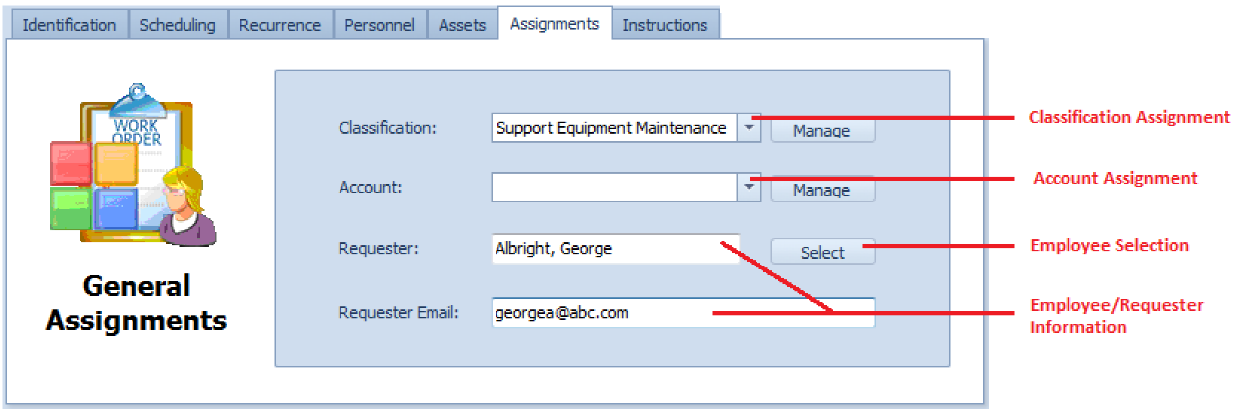
To assign an asset to the work order:

- Move to the **Assigned Assets** section and click on the **+** (plus sign) in the data control found there.
- From the invoked lookup dialog, click on the asset record you want to assign.
- Click on the **Select** button.

Wizard Assignments Tab

This section allows you make some general type assignment to your work order. These assignments help with the creation of reports.

The following image illustrates the elements of this section:



To make the assignments in this section:

- Move to the appropriate field and click on the down arrow on the drop down list.
- Make your selection by clicking on it.

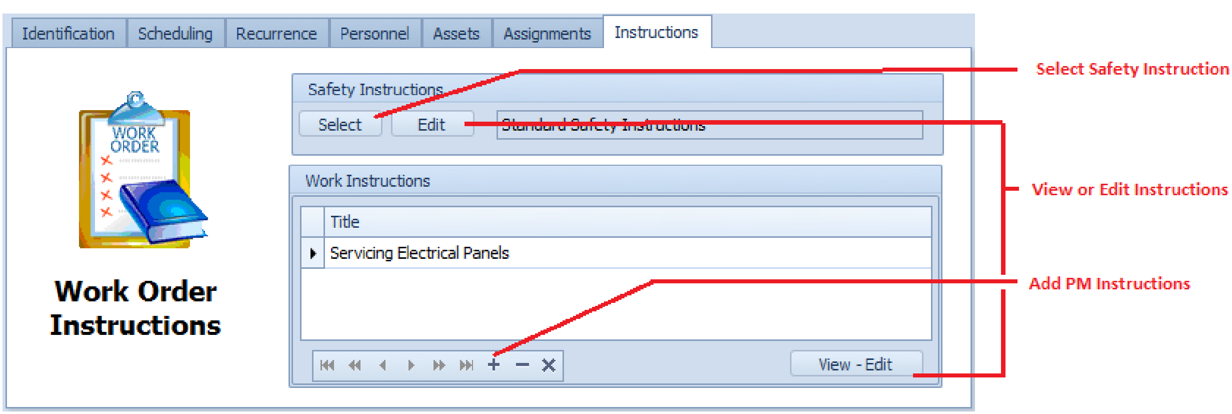
To assign a Requester:

- Move to and click on the **Select** button adjacent to **Requester** field.
- Select the employee you want to assign from the displayed grid, and then click on the **Select** button.

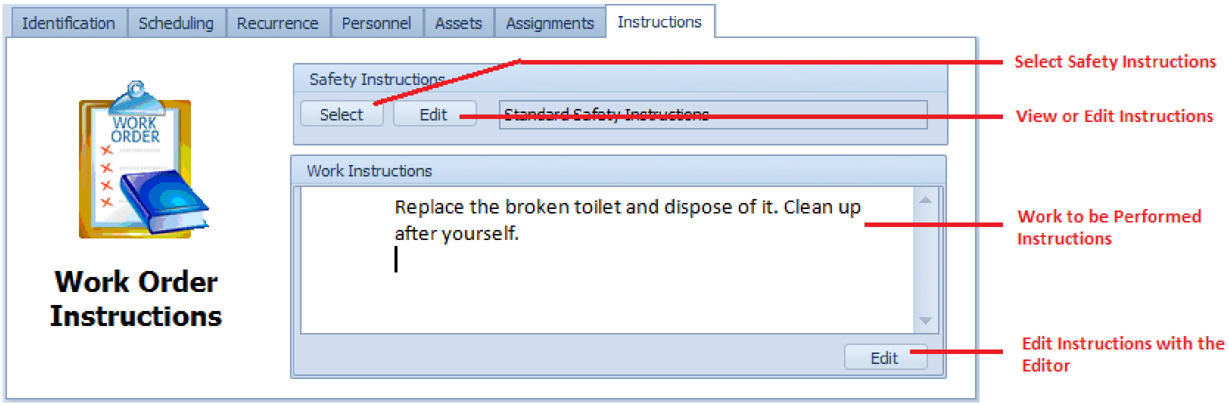
Wizard Instructions Tab

The options on this tab change somewhat by the type of work order currently in use. With recurring work order types you select work orders instructions from list of predefined instructions. Whereas, repair types of work order allow to type in your work instructions.

The following illustration shows the elements for recurring types of work orders:



The following illustration shows the elements for repair types of work orders:



To assign safety instruction to the work order

- Move the **Safety Instructions** section and click on the **Select** button.
- Select the instructions you want to assign from those listed, and click on the **Select** button.

To assign work instructions for recurring work order types

- Move the **Work Instructions** section and click on the **Select** button.
- Select the instructions you want to assign from those listed, and click on the **Select** button.

To include work instruction for repair types of work orders

- Move to the **Work Instructions** section and edit your instructions in the editor found here. You can also click on the **Edit** button found in this area and use the *Repair Procedures Editor* discussed elsewhere in this chapter.

Wizard – Save and Close

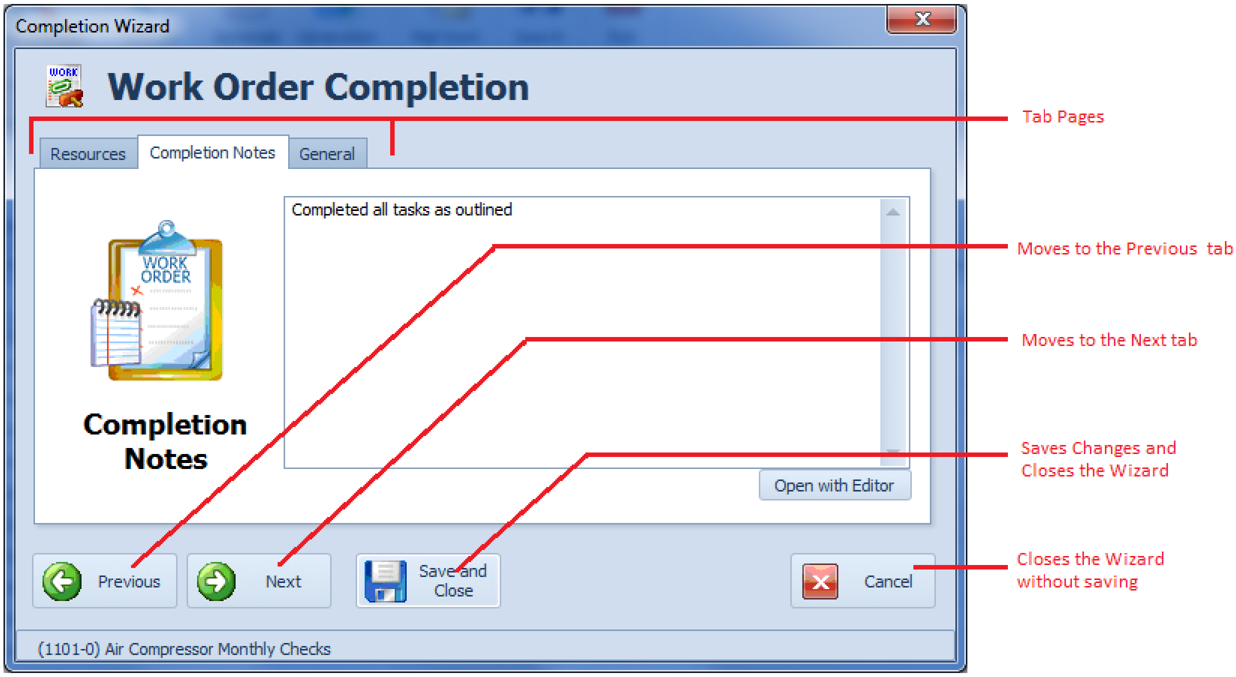
Whenever you either make changes to work orders, or create a new one with *Work Order Wizard*, ensure to save your changes.

- Click on the **Save and Close** button to save and apply your changes.

Work Order Completion Wizard

The ***Work Order Completion Wizard*** was designed to help with the process of completing a work order.

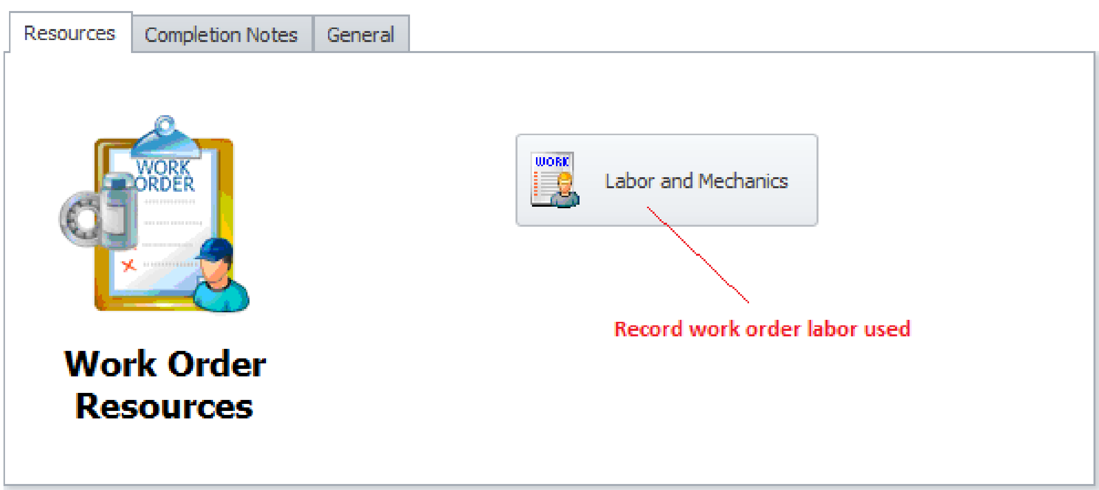
The following illustration shows the general or shared features of the Wizard:



Ensure to click on the **Save and Close** button when done using this wizard to have your information saved back to the currently selected work order.

Wizard – Resources Tab

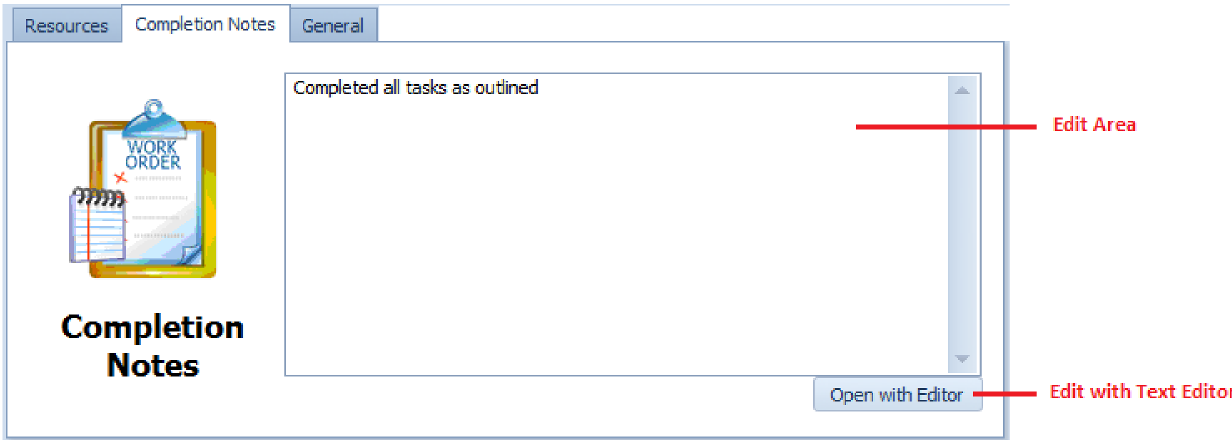
The following image illustrates the elements of this section:



- **Labor and Mechanics** – Clicking on this button will launch the ***Work Order Labor*** dialog which allows you to record the employees and their associated times used in the work order completion. This feature is discussed in the ***Labor Resources*** section of this chapter.

Wizard - Completion Notes Tab

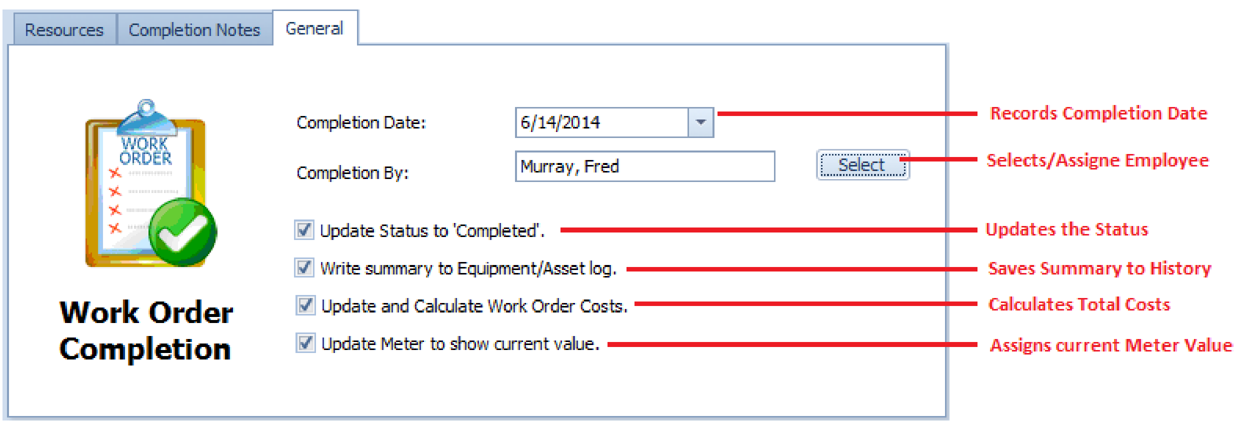
The following illustrates the elements of this section:



Use the editor found here to record your completion notes or comments. Clicking on the **Open with Editor** button will allow you to record this information with the ***Text Editor***.

Wizard – General Tab

The following illustrates the elements of this section:



- **Completion Date** - Clicking on the down arrow here will expand the drop down calendar which will allow you to record the **Completion Date** of the work order.
- **Completed By** – Click on the **Select** button adjacent to this field to invoke the ***Employees Lookup*** dialog. Select the employee you want to assign from the grid, and click **Select**.
- **Update Status to ‘Completed’** – Checking this option will have the wizard change the work order’s status to ‘Completed”.
- **Write summary to Equipment/Asset Log** – Checking this option will have the wizard save a summary of the completed work order back to the **Asset’s Log**.
- **Update and Calculate Work Order Costs** – Checking this option will update the work order’s costs information. Please refer to the ***Work Order Costs*** section of this chapter for more information.
- **Update Meter to show current value** – Checking this option will have the wizard access the **Assets database**, read the **Primary Asset’s** current meter value, and then apply this to the current work order.

Completion Wizard – Save and Close

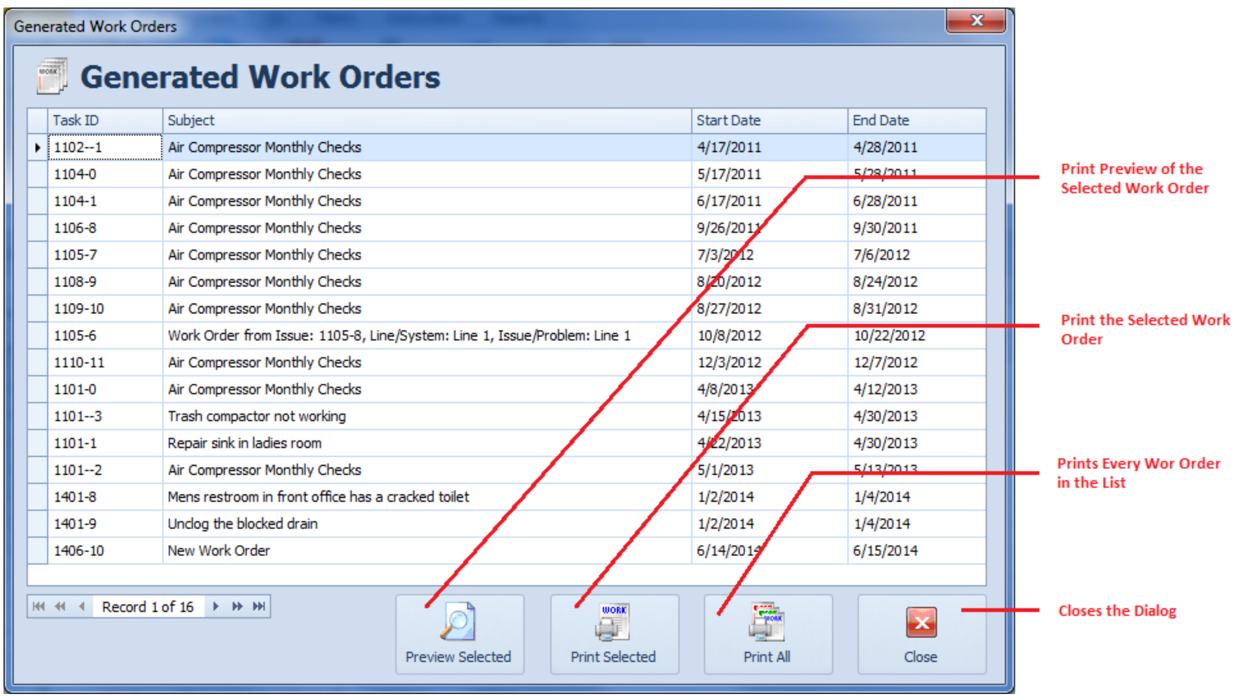
Whenever you either make changes using the ***Work Order Completion Wizard***, ensure to save your changes.

- Click on the **Save and Close** button to save and apply your changes.

Work Order Generation

The ***Work Order Generation*** routines allows you to generate a group of work orders to be accessed together. Once generated you can then print selected work orders or print all the work orders found in this list.

The following illustrates the elements of ***Generated Work Orders*** dialog.



- **Preview Selected** – Clicking this button will provide a Print Preview of the selected work order.
- **Print Selected** – Clicking this button will allow you to Print the selected work order.
- **Print All** – Clicking this button will send every work order listed directly to the default printer.
- **Close** – Closes the dialog.

Generate Today

This option will show all work orders with a scheduled start date of today. To use this option:

- From the ***Main Scheduler***, move to the ribbon control and select the **Home** tab.
- Click on the **Generate Today** option.

Generate by Dates

This option allows you to generate a date range of work orders. To use this option:

- From the ***Main Scheduler***, move to the ribbon control and select the **Home** tab.
- Click on the **Generate Options** button to expand the drop down menu.
- Click on the **Generate by Dates** option.
- From the invoked ***Date Range*** dialog, setup the scheduled start and end dates of the work orders you want to view. Click **Select** button when done.

Generate by Classification

This option allows you to generate a date range of work orders belonging to a single classification assignment. To use this option:

- From the ***Main Scheduler***, move to the ribbon control and select the **Home** tab.
- Click on the **Generate Options** button to expand the drop down menu.
- Click on the **Generate by Classification** option.
- From the invoked dialog screen setup the scheduled start and end dates of the work orders you want to view.
- Move to the **Select Classification** group and click on the **Select** button found there.
- Click on the classification you want to use from those listed and click on the **Select** button.
- Click on the **Select** button from the setup dialog.

Generate by Location

This option allows you to generate a date range of work orders for a single location assignment. To use this option:

- From the ***Main Scheduler***, move to the ribbon control and select the **Home** tab.
- Click on the **Generate Options** button to expand the drop down menu.
- Click on the **Generate by Location** option.
- From the invoked dialog screen setup the scheduled start and end dates of the work orders you want to view.
- Move to the **Select Location** group and click on the **Select** button found there.
- Click on the location you want to use from those listed and click on the **Select** button.
- Click on the **Select** button from the setup dialog.

Scheduling by Meter

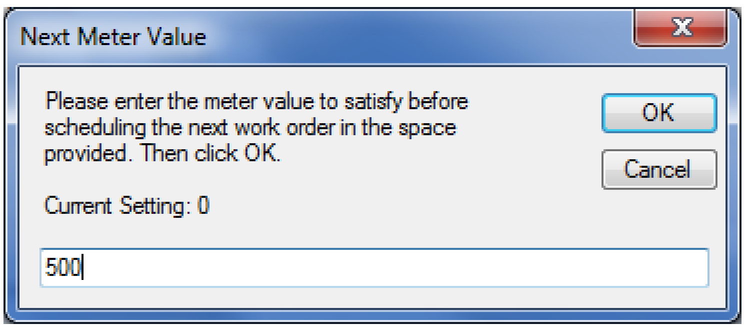
With the ***Maintenance Scheduler*** module you can have new recurring work orders regenerate by meters values. These meters can actually represent a variety of items such as hours, odometer readings, kilometers, cycles and more. This feature comes in handy for a variety of reasons such as scheduling equipment maintenance after so many hours or miles have past.

To schedule by meter:

- From ***Main Scheduler***, locate and select the work order you want to work with.
- Move to the **Details** tab, and move the **Work Order Settings** section.
- Ensure the work order is assigned one of the recurring **Task Types.**
- Move to the **Work Order Recurrence** group, and select the **Frequency** of **Every XX Meters**.
- Move to the **XX Criteria** field and edit this value. For example, say you have an automobile that you want to change the oil every 6,000 miles. You would enter 6000 here (no commas).
- Next you need to setup the starting point for the commencement of the first work order. This step only needs to be completed once. On future work orders the **XX Criteria** information will be automatically applied.

To setup when to perform the first work order

- Move to and click on the **Work Order** page in the ribbon.
- Click on the **Recur** option to expand the drop down.
- Click on the **Set Next Meter** option.



- Enter your numeric value (no commas) in the space provided, and click on the **OK** button.

Generate New When Done

The **Generate New When Done** flag is always set when scheduling by meters (the checkmark in the scheduler is ignored). This is to say that the following criteria must be satisfied for an 'Every XX Meters' type of work orders to be able to regenerate:

- An Equipment record or Asset is assigned to a work order.
- The Equipment current meter is greater than zero.
- The Recurring **Frequency** for the current work order must be setup to 'Every XX Meters'.
- A Value must be set for the **XX Criteria**.
- The **Set Next Meter** has been set for the current work order.
- The previous work order must be set as 'Completed'.
- The '**Do Not Regenerate**' flag has NOT been set.

Note: When a new work order is created, the new work order will have a scheduled start date 2 years in advance of the date it was created. This is to prevent the work order from showing up in the default filters, and from being reported as being past due. When the Equipment meter value reaches or

exceeds the Next Meter value the schedule start date will be changed to the date this information was first realized.

When the new work order is generated:

- The previous, completed work order will have its "Do Not Regenerate" flag set to true. This prevents the work order from regenerating itself multiple times.
- The program will add the current equipment meter reading to the value as setup in the "XX Criteria" section, and use the resulting value to be met before the next work order becomes due.
- The new task will have a scheduled start date of 2 years in advance from the date the new task was created.

Editing Recurring Tasks

The program is designed to allow users to create recurring work orders. These work orders regenerate themselves from previously created ones, copying all the fields and assignments of the previous work order to the new generated work order. Basically only the status and schedule dates are changed in the new work order (or next meter value, as the case may be).

To change or delete a work order in the database, you need to find the work orders that have NOT yet regenerated themselves. Changing work orders that have yet to regenerate will affect only those work orders from that point forward. All previously generated work orders will not be affected. If you want to change works orders that have already regenerated, you will need to do this manually.

Filter – Set to Regenerate

To find all the work orders that are set to regenerate:

- Open the ***Main Scheduler***.
- Move to the **Filters** page in the ribbon and click on the **Set to Regenerate** option.

This will filter the database by all work orders that HAVE NOT regenerated. Deleting one of these work orders will prevent the program from regenerating it in the future. However, any previously regenerated work orders will remain in the database. You can also change the ***Do Not Regenerate*** flag to stop the work order from regenerating in the future. Also note that editing one of these work order will affect all work orders from that point forward.

Change Do Not Regenerate flag.

To toggle the **Do Not Regenerate** flag:

- Locate the work order you wish to stop from regenerating.
- Open the **Work Orders** tab in the ribbon and click on the **Recur** button to expand the drop down menu.
- Click on the **Change 'Do Not Generate' Flag** option.

- When prompted about the operation, click on the **Yes** button.

Changing work orders that have already regenerated.

To change work orders that have already regenerated:

- Locate the work order that has the same **Subject** or Description as the one you want to change.
- Move to the **Filters** tab in the ribbon and click on the **With Current Description** option to expand the drop down.
- Click on the filter option of your choice:
  - **Show All Records** – Shows every record in the database with the current description.
  - **Open Records Only** – This option shows all records yet to be completed.
  - **Closed Records Only** – This option shows all records that have been marked as completed.
  - **Set to Regenerate** – This option filters the database to show only those records that have not regenerated.

You can edit these tasks with new dates or delete them from the database. Please note that if you edit a task that has already been regenerated (*Do Not Regenerate* flag checked) it will ONLY affect that task. Other, already created tasks or work orders will not be affected.

Copy and Paste Work Order

To copy a work order's primary information to be pasted into a new or different work order:

- Locate and select the work order you want to copy.
- Move to the ribbon and click on the **Work Orders** tab.
- Click on the **Copy Work Order** option.

To paste a previously copied work order:

- Locate and select the work order you want to paste over.
- Move to the ribbon and click on the **Work Orders** tab.
- Click on the **Paste Work Order** option.

Export the Current Work Order

To export the current work order:

- Locate and select the work order you want to export.
- Open the **File** menu and select the **Export Work Order** option.
- From the **Export Work Order** dialog box, move to the **Save as type** drop down and select the file type you want to save to.
- Move to the **File Name** text box and enter the file name you want to use.
- Click on the **Save** button.

The following export formats are supported: pdf, xlsx, xls, rtf, docx, htm, emf, tiff, png, jpg, gif, bmp and xps.

Printing the Select Work Order

To print the current work order:

- Locate and select the work order you want to print.
- Open the **File** menu and expand the **Print** menu by clicking on it.
  - Click on the Print Option of your choice:
    - **Print Work Order** - Allows printer selection and other options before printing.
    - **Quick Print** - Sends the document directly to the default printer
- **Print Preview** - Provides a print preview of the current document

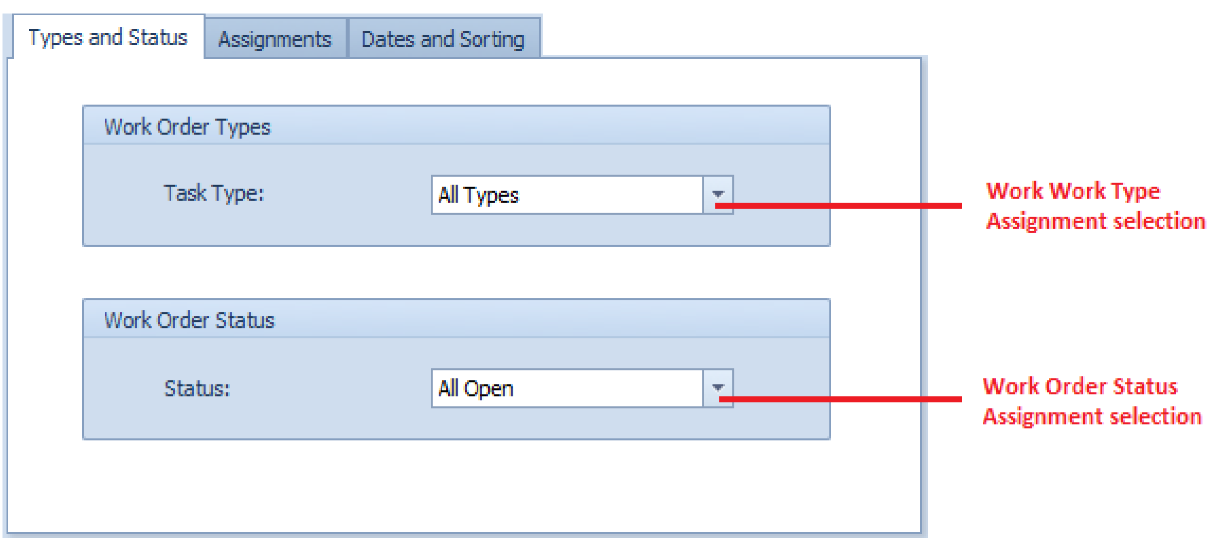
Main Report – Filter Wizard

The ***Main Reports – Filter Wizard*** is used for the **Main Filter Wizard**, **Main Summary Report**, **Work Order Costs Report, Completion Summary Report** and the **Down Time Report**. This wizard will be modified somewhat by its application, but it is setup basically the same no matter how used.

When used for either filtering or reporting purposes, the resulting items will be returned by the choices or criteria as setup with this wizard.

Types and Status tab

The following illustrates the elements found on this tab:



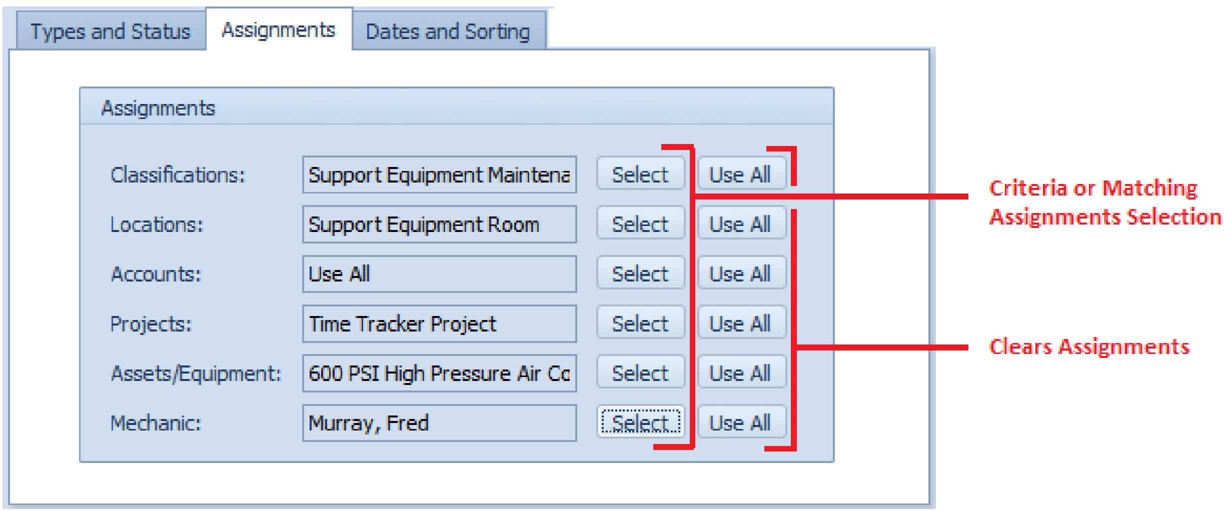
- **Work Order Types** – This drop down allows for the selection of the types of work orders to be included. Make your selection by clicking on an item in the drop down list.

- **Work Order Status** – This drop down allows for the selection of the work orders status indicator to be included. Make your selection by clicking on an item in the drop down list.

With the ***Completion Summary Report***, this tab is titled **Status**, and only the **Work Order Status** section is available. With both the ***Work Orders Costs*** and ***Down Time Reports***, this tab is titled **Task Types**, and only the **Work Order Types** section is available.

Assignments tab

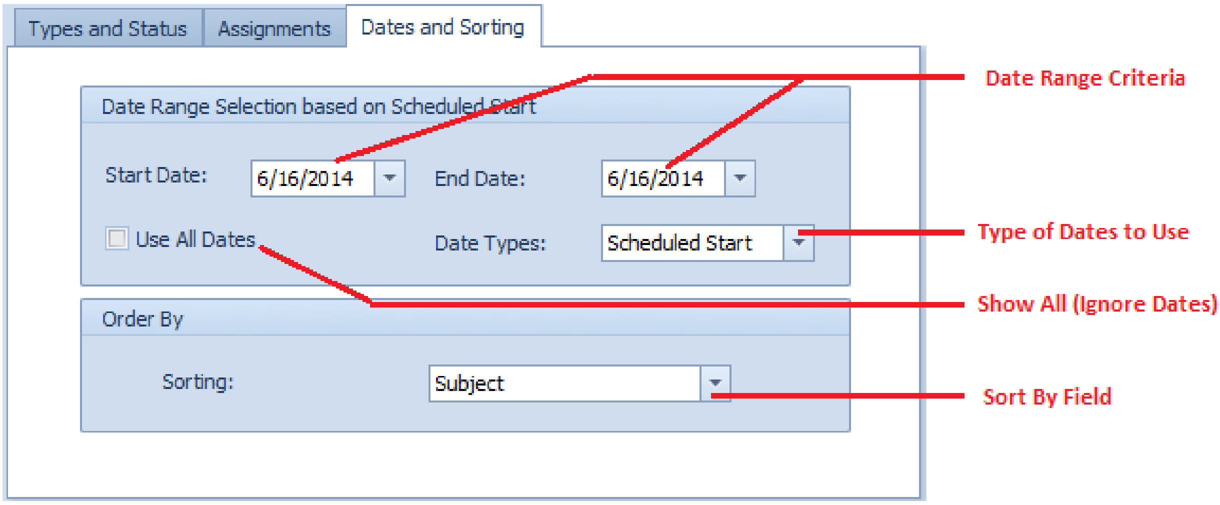
The following illustrates the elements found on this tab:



- To assign values to these fields:
  - Move to the appropriate fields and click on the **Select** button adjacent to them.
  - From the invoked dialogs, move to the display grid and click on the record of your choice.
  - Click on the **Select** button.
- To clear the assignments:
  - Move to the appropriate field and click on the **Use All** button adjacent to them.

Dates and Sorting/Grouping tab

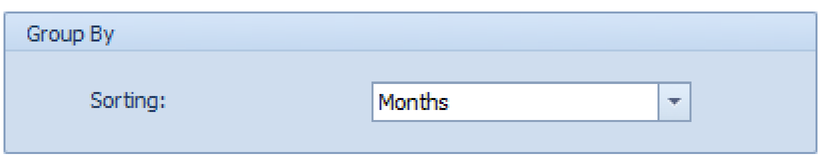
The following illustrates the elements found on this tab:



To assign date values:

- Move to the **Start Date** field and using the drop down calendar, select the starting date of your filtering criteria.
- Move to the **End Date** field and using the drop down calendar, select the ending date of your filtering criteria.
- To ignore or use all available dates, check the **Use All Dates** checkbox.
- Next, if dates are used, move to the **Date Types** drop and select the type of dates you want your criteria based on.

When using for the ***Main Summary Report*** or ***Custom Filter Wizard***, move to the **Order By** section and select how you want your items sorted.



When used for the other report options, move to the **Group By** area and select the Sorting option that describes how you want your items grouped.

With everything setup as wanted, move to and click on the **Accept** button.

Filtering Options

To see information about filtering options, please refer the ***Ribbon Control – Filters Tab*** section of this chapter.

Work Orders Summary Report

This report uses the ***Main Reports – Filter Wizard*** for the creation of report criteria. Please refer to the ***Main Reports – Filter Wizard*** section of this chapter for more information. The only elements of this wizard that is not explained with this wizard is outlined next.

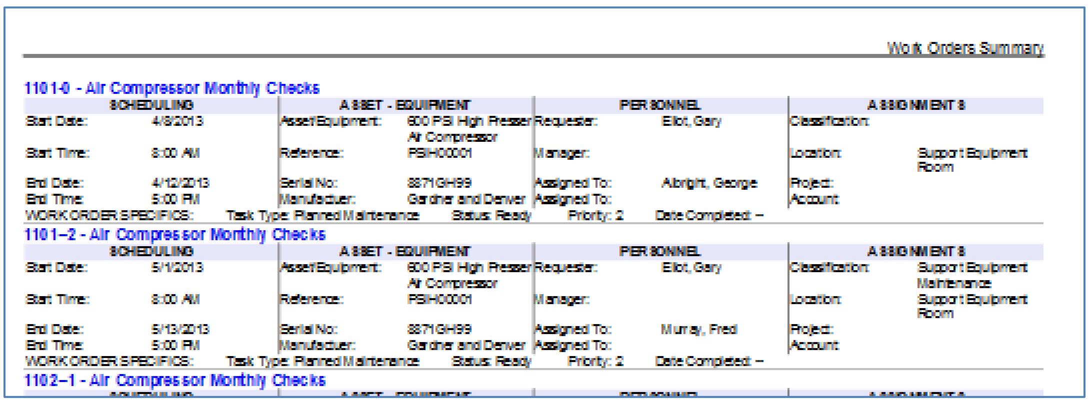
These options are found on the **Dates and Sorting** tab of the wizard.

- **Include Task Instructions** – When checked, the report will include all task instructions as assigned to each of the reported work orders.
- **Include Delays and Completion Comments** – When checked, the report will include all **Delays and Completions comments** that were recorded for each of the reported work orders.

To create a ***Work Orders Summary Report***:

- Move to the **Reports** tab in the ribbon.
- Click on the **Summary Report** option.
- Follow the instructions as outlined in the ***Main Reports – Filter Wizard*** section of this chapter.

The following illustration shows a preview of a *Work Orders Summary Report*:



Work Orders Summary

1101-0 - Air Compressor Monthly Checks

SCHEDULING		ASSET - EQUIPMENT		PERSONNEL		ASSIGNMENTS	
Start Date:	4/8/2013	Asset/Equipment:	600 PSI High Presser Air Compressor	Requester:	Eliot, Gary	Classification:	
Start Time:	8:00 AM	Reference:	PSIH00001	Manager:		Location:	Support Equipment Room
End Date:	4/12/2013	Serial No:	3871GH99	Assigned To:	Albright, George	Project:	
End Time:	5:00 PM	Manufacturer:	Gardner and Denver	Assigned To:		Account:	

WORK ORDER SPECIFICS: Task Type: Planned Maintenance Status: Ready Priority: 2 Date Completed: –

1101–2 - Air Compressor Monthly Checks

SCHEDULING		ASSET - EQUIPMENT		PERSONNEL		ASSIGNMENTS	
Start Date:	5/1/2013	Asset/Equipment:	600 PSI High Presser Air Compressor	Requester:	Eliot, Gary	Classification:	Support Equipment Maintenance
Start Time:	8:00 AM	Reference:	PSIH00001	Manager:		Location:	Support Equipment Room
End Date:	5/13/2013	Serial No:	3871GH99	Assigned To:	Murray, Fred	Project:	
End Time:	5:00 PM	Manufacturer:	Gardner and Denver	Assigned To:		Account:	

WORK ORDER SPECIFICS: Task Type: Planned Maintenance Status: Ready Priority: 2 Date Completed: –

1102–1 - Air Compressor Monthly Checks

Current Work Order Details Report

This report is based on the currently selected work order and will provide detailed information about the work order. This includes work order scheduling, assignments, materials list, total cost and more.

To create a ***Work Order Details*** Report:

- Locate and make current the work order you want to base your report on.
- Move to the **Reports** tab in the ribbon and expand the **Current W.O.** options.
- Click on the **Work Order Details** option.

Current Work Order Estimated Costs Report

This report gives you a printout of the cost information associated with the currently selected work order.

To create a ***Current Work Order Estimated Costs Report***:

- Locate and make current the work order you want to base your report on.
- Move to the **Reports** tab in the ribbon and expand the **Current W.O.** option.
- Click on the **Estimated Costs** option.

Completed Work Orders Costs Report

This report gives you a printout of the cost information associated with the work orders with a status indicator of 'Completed'.

To create the ***Completed Work Orders Costs*** report:

- Move to the **Reports** tab in the ribbon and expand the **Completed WOs** option.
- Click on the **Work Orders Costs** option.
- Follow the instructions as outlined in the ***Main Reports – Filter Wizard*** section of this chapter.

Completed Down Time Wizard Report

The **Down Time Wizard** Report allows you to run a report on a machine or machines down time. This report allows you to specify date ranges and other criteria for some fairly custom reporting.

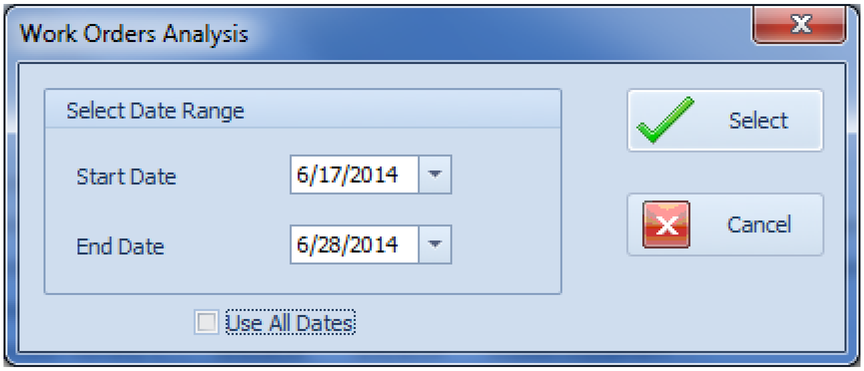
To create the **Down Time Wizard** report:

- Move to the **Reports** tab in the ribbon and expand the **Completed WOs** option.
- Click on the **Down Time Wizard** option.
- Follow the instructions as outlined in the ***Main Reports – Filter Wizard*** section of this chapter.

Completion Analysis Report

The **Completion Analysis** Reports look at all work orders that are completed in a given time date range, and then breaks down this information as to the total number of different work orders types that were completed, and the percentage of these types that where completed on time or late.

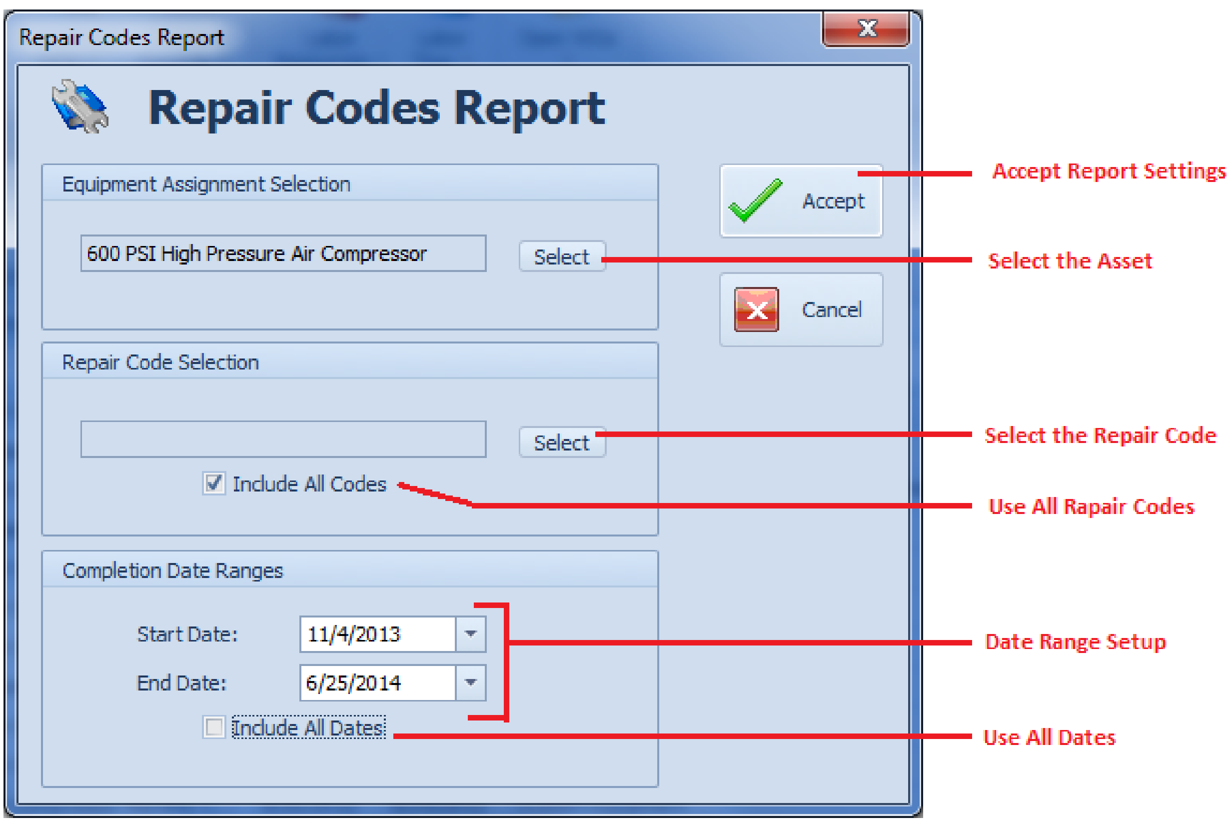
To create the **Completion Analysis** report:



- Move to the **Reports** tab in the ribbon and expand the **Completed WOs** option.
- Click on the **Completion Analysis** option.
- Setup the **Start Date** and **End Date** for your report date range and click on the **Select** button.

Repair Codes Report

The **Repair Codes** Report allows you to create a report based on a single piece of equipment, either one or all repair codes for that equipment's work orders, and a date range you specify. Please refer to the ***Work Order Repair Code*** section of this chapter to see possible benefits of using repair codes.



To create a Work **Repair Codes** Report:

- Move to the **Reports** tab in the ribbon and expand the **Completed WOs** option.
- Click on the **Repair Codes** option.
- Click on the **Select** button in the **Equipment Assignment Selection** group.
- Click on the equipment you want to base your report on from those listed and click on the **Select** button.
- Click on the **Select** button in the **Repair Code Selection** group.
- Click on the repair code you want to base your report on from those listed and click on the **Select** button.
- To use all codes insure that the **Include All Codes** checkbox is checked.
- Setup the **Start Date** and **End Date** for your report date range.
- To use all dates insure that **Include All Dates** checkbox is checked.
- Click on the **Accept** button to run the report.

Equipment Summary Report

The Equipment Summary Report groups the report by equipment and then gives totals for the following:

- Labor Hours
- Labor Costs
- Material Costs
- Other Costs
- Total Costs
- Total number of Work Orders Performed
- Total Downtime.

To create the **Equipment Summary** Report:

- Move to the **Reports** tab in the ribbon and expand the **Summary Reports** option.
- Click on the **Equipment Summary** option.
- Follow the instructions as outlined in the *Main Reports – Filter Wizard* section of this chapter.

Completion Summary Report

The Completion Summary Report groups the report by dates and then reports on the following:

Work Orders Completion Summary Report

Date Completed	Asset ID	Asset Description	Work Order Subject	Labor Hours	Down Time	Total Costs	On-Time
5/16/2014	PSIH00001	600 PSI High Presser Air Compressor	Air Compressor Monthly Checks	420.00		493.04	NO
6/16/2014	PSIH00001	600 PSI High Presser Air Compressor	Air Compressor Monthly Checks	300.00		111.39	NO
TOTALS				**720.00**		**604.00**	

- Date Completed
- Asset Information
- Work Order Subject
- Labor Hours

- Downtime
- Total Costs
- On-Time

To create a **Completion Summary** Report:

- Move to the **Reports** tab in the ribbon and expand the **Summary Reports** option.
- Click on the **Completion Summary** option.
- Follow the instructions as outlined in the ***Main Reports – Filter Wizard*** section of this chapter.

Open Work Orders By Mechanic Report

The ***Open Work Orders by Mechanic Report*** allows you create a report on all open work orders for a given mechanic or employee.

To create an **Open Work Orders by Mechanics Report**:

- Move to the **Reports** tab in the ribbon and expand the **Labor Resources** option.
- Click on the **Open by Mechanic** option.
- From the invoked ***Employees Database*** dialog, select the employee you want to base your report on from those listed in the grid.
- Click on the **Select** button.

Closed Work Orders By Mechanic Report

The ***Closed Work Orders by Mechanic Report*** allows you create a report on all closed work orders for a given mechanic or employee.

To create a **Closed Work Orders by Mechanics Report**:

- Move to the **Reports** tab in the ribbon and expand the **Labor Resources** option.
- Click on the **Closed by Mechanic** option.
- From the invoked ***Employees Database*** dialog, select the employee you want to base your report on from those listed in the grid.
- Click on the **Select** button.

Overdue Work Orders By Mechanic Report

The ***Overdue Work Orders by Mechanic Report*** allows you create a report on all overdue work orders for a given mechanic or employee.

To create an **Overdue Work Orders by Mechanics Report**:

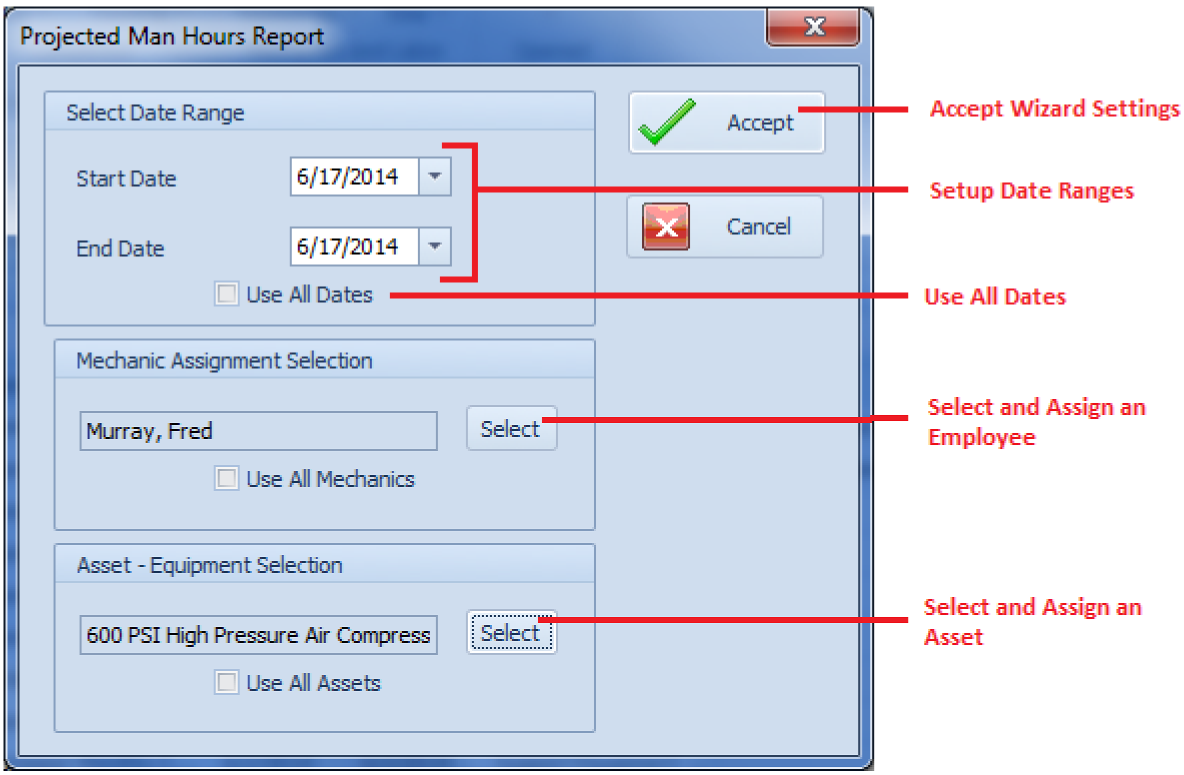
- Move to the **Reports** tab in the ribbon and expand the **Labor Resources** option.

- Click on the **Overdue by Mechanic** option.
- From the invoked ***Employees Database*** dialog, select the employee you want to base your report on from those listed in the grid.
- Click on the **Select** button.

Man Hours Report Wizard

The ***Man Hours Report Wizard*** is used with both the ***Projected Man Hours*** and ***Actual Man Hours*** reports.

The following illustrates the elements found on this wizard:



- **Start Date** – This field indicates the Starting Date of the report's date range. Select from the drop down calendar.
- **End Date** – This field indicates the Ending Date of the report's date range. Select from the drop down calendar.
- **Use All Dates** – Check this option to ignore any assigned dates.
- **Mechanic Assignment Selection** - Click on the **Select** button here to base your report on a specific employee assignment.
- **Use All Mechanics** – Check this option to ignore the mechanic assignment, and use all assignments.
- **Asset – Equipment Selection** - Click on the **Select** button here to base your report on a specific asset assignment.

- **Use All Assets** – Check this option to ignore the asset assignment, and use all assignments.
- **Accept** – Clicking this button accepts the report criteria as configured.

Projected Man Hours Report

The ***Projected Man Hours Report*** will return information on open work orders, and the projected man hours assigned for their completion.

Projected Man Hours Report

Task ID	Subject	Projected Hours	Estimated Down Time
1101--3	Trash compactor not working	0.00	
1104-1	Air Compressor Monthly Checks	0.00	
1101-0	Air Compressor Monthly Checks	135.00	
1109-10	Air Compressor Monthly Checks	0.00	
1106-8	Air Compressor Monthly Checks	0.00	
1401-8	Mens restroom in front office has a cracked toilet	0.00	
1105-7	Air Compressor Monthly Checks	0.00	
1406-10	New Work Order	0.00	0
1101--2	Air Compressor Monthly Checks	0.00	
1108-9	Air Compressor Monthly Checks	0.00	
1101-1	Repair sink in ladies room	160.00	1 hrs 30 mins
1104-0	Air Compressor Monthly Checks	0.00	
1401-9	Unclog the blocked drain	0.00	0
1110-11	Air Compressor Monthly Checks	0.00	1 hrs 30 mins
1105-6	Work Order from Issue: 1105-8, Line/System: Line 1, Issue/	0.00	

To create the **Projected Man Hours Report**:

- Move to the **Reports** tab in the ribbon and expand the **Labor Time** option.
- Click on the **Projected Man Hours** option.
- Follow the instructions as outlined in the ***Man Hours Report Wizard*** section of this chapter.

Actual Man Hours Report

The ***Actual Man Hours Report*** will return information on closed work orders, and the man hours actually used and recorded for their completion.

To create the **Actual Man Hours Report**:

- Move to the **Reports** tab in the ribbon and expand the **Labor Time** option.
- Click on the **Actual Man Hours** option.
- Follow the instructions as outlined in the ***Man Hours Report Wizard*** section of this chapter.

Open Work Orders by Primary Asset Report

This reports displays information on all open work orders for a given Primary Asset.

To create an **Open Work Orders by Primary Asset Report**:

- Move to the **Reports** tab in the ribbon and expand the **Open WOs** option.

- Click on the **Open by Primary Asset** option.
- From the invoked *Equipment and Assets* dialog, move to the grid and click on the record of your choice. Your report will be based on this selection.
- Click on the **Select** button.

Projected Costs Report

This report returns information of the Projected Costs of work orders.

Work Orders Projected Costs Report

April - 2013

Task ID	Start Date	Materials	Labor Costs	Contractor	Taxes	Other	Total
1101-0	4/8/2013	$180.63	$467.63				$180.63
1101--3	4/15/2013	$0.00	$0.00				
1101-1	4/22/2013	$0.00	$57.82				$0.00
							$180.63

May - 2013

Task ID	Start Date	Materials	Labor Costs	Contractor	Taxes	Other	Total
1101--2	5/1/2013	$0.00	$0.00				
							$0.00

January - 2014

Task ID	Start Date	Materials	Labor Costs	Contractor	Taxes	Other	Total
1401-9	1/2/2014	$0.00	$0.00				
1401-8	1/2/2014	$0.00	$0.00				
							$0.00

May - 2014

Task ID	Start Date	Materials	Labor Costs	Contractor	Taxes	Other	Total
1102--1	5/5/2014	$335.54	$157.50				$493.04
							$493.04

June - 2014

To create the Projected Costs Report:

- Move to the **Reports** tab in the ribbon and expand the **Open WOs** option.
- Click on the **Open by Primary Asset** option.
- Follow the instructions as outlined in the *Main Reports – Filter Wizard* section of this chapter.

Past Due Work Orders Report

This report returns information on all work orders that have scheduled completion prior to today's date.

To create the Past Due Work Orders Report:

- Move to the **Reports** tab in the ribbon and expand the **Open WOs** option.
- Click on the **Past Due Work Orders** option.

Open Work Requests Report

This report returns information on work orders that still have a status of 'Work Request'.

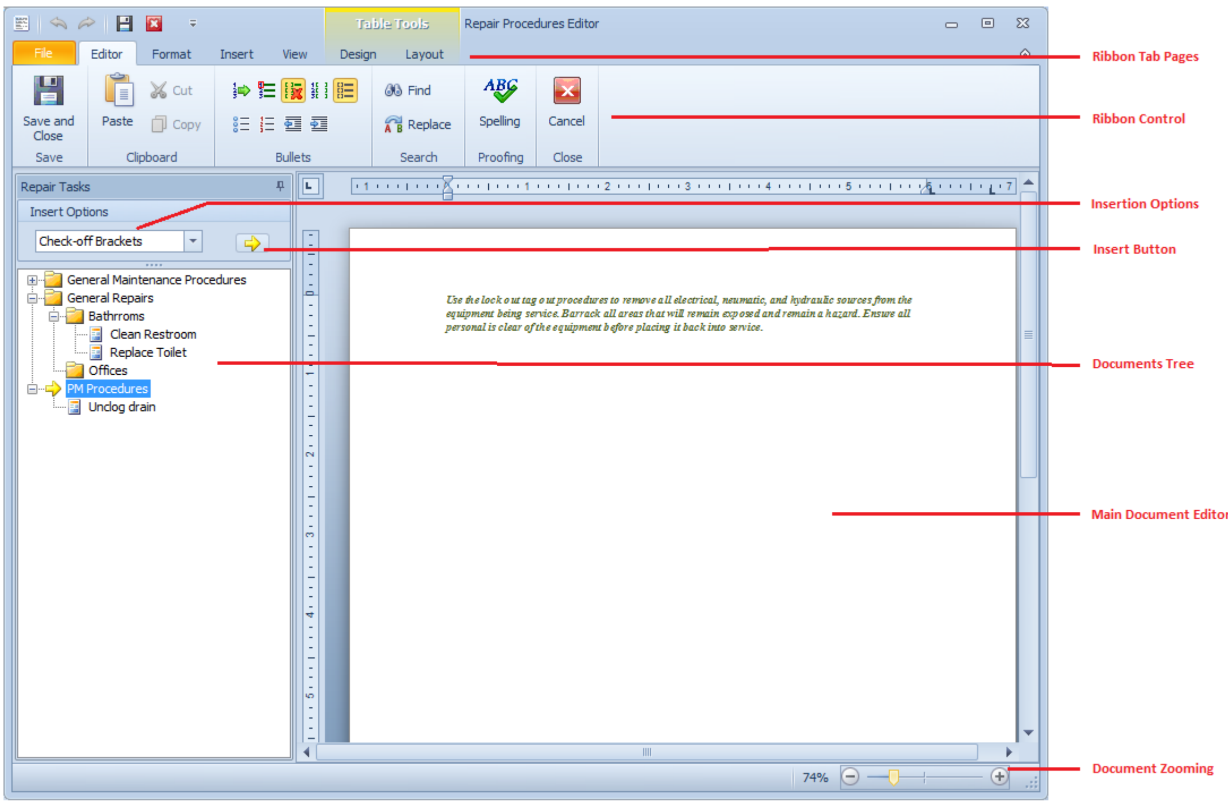
To create the Open Work Request Report:

- Move to the **Reports** tab in the ribbon and expand the **Open WOs** option.
- Click on the **Open Work Requests** option.

Repair Procedures Editor

The **Repair Procedures Editor** is used to create and modify various work order related documents and instructions. One of the key advantages of using this editor as compared to our other editor is that you can build a database of repair related procedures, and reuse them for easy insertion.

The following illustrates the layout of the **Repair Procedures Editor**:

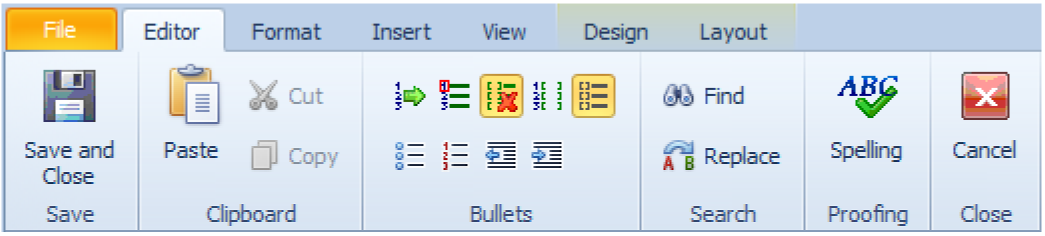


With the exception of the ribbon's **Editor** tab, this editor employs many of the same features of the word processor we use throughout the application. Because it has so many shared features, we would like to refer you to the chapter on the ***Rich Text Editor*** to learn how to use these shared features.

Editor Ribbon Control

The ***Repair Procedures Editor*** has its own ribbon control, and like the other ribbons found in the system, this ribbon has its available options arranged in logical groups.

The following illustration shows the **Editor's** ribbon:



The following are the elements on the **Editor** ribbon tab, reading left to right:

- **Save and Close** - Saves the current document back to the call-up control and closes the editor.
- **Paste** – Inserts any clipboard text into the document, and at the current cursor location.
- **Cut** – Deletes selected text and places it into the clipboard.
- **Copy** – Copies selected text and places it into the clipboard.
- **Set Next Number** -Sets the next number to be used in the Instructions – Numbered bullet list.
- **Reset to One** -Sets the next number to One in the Instructions - Numbered bullet list.
- **Toggle Instructions Bullets** -Turns instruction bullets either on or off.
- **Numbers + Brackets** -Turns on the Instructions type Numbers, Check-off bracket style bullets.
- **Check-Off Brackets** - Turns on the Instructions type Check-off bracket style bullets.
- **Bullets** - Start a bulleted list (non-instruction type).
- **Numbering** - Start a numbered list (non-instruction type).
- **Decrease Indent** - Decrease the indent level of the paragraph.
- **Increase Indent** - Increase the indent level of the paragraph.
- **Find** - Find text in the document.
- **Replace** - Replace text in the document.
- **Spelling** - Checks the document for spelling errors.
- **Cancel and Close** – Closes the editor without applying any changes.

For the elements on the remaining ribbon tab pages, please refer to the ***Rich Text Editor*** chapter.

Editing Your Document

To edit your document with this editor, simply move to the main editor and begin the editing process. This editor supports many formatting options and uses the Rich Text Format (RTF). Some of your formatting options will be discussed here. However, the majority of the available options for this editor will be discussed in detail in the ***Rich Text Editor*** chapter.

Using Instructions Bullets

When editing work order instructions using this editor, you may want to include bullets lists, lists with check off boxes and numbered lists with check off boxes.

To use Instruction bullets:

- Move to the ribbon control and click the bullet type of your choice. The top roll of options in the **Bullet** group deals with instruction type bullets.
- Click in the editor where you want to begin using bullets.
- Press the **Enter** key to both start a new line, and insert the selected bullet style.
- Repeat clicking **Enter** after each line to continue the bullets insertion.

To stop the use of the bullets:

- Move to the ribbon and click on the **Toggle Instruction Bullets** option.

Find

To search for every occurrence of a specific word or phrase:

- Click the **Find** button on the Editing toolbar or press **CTRL+F**.
- From the invoked **Find and Replace** dialog, move to the **Find what** box and type in the text to search for.
- Select other search options that you want and click **Find Next**.
- To cancel a search, click **Cancel** or press ESC.

Find and Replace Text

To automatically replace text:

- Click the **Replace** button on the Editing toolbar or press **CTRL+H**.
- From the invoked **Find and Replace** dialog, move to the **Find what** box and type in the text to Replace.
- Select other search options that you want and click **Find Next**, **Replace** or **Replace All**.

For more information on the ***Find and Replace*** features, please refer the ***Rich Text Editor*** chapter.

Working with the Procedures Database

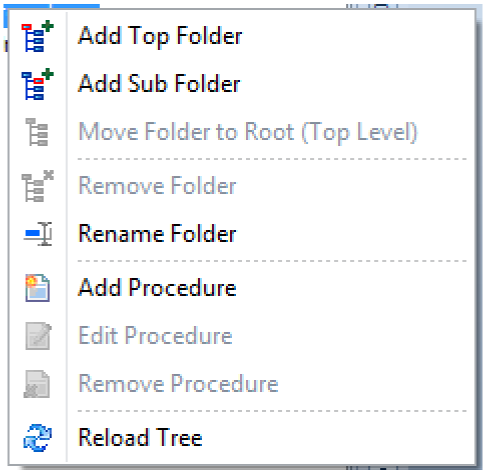
The **Procedures Database** part of the ***Repair Procedures Editor*** allows you to create a database of common tasks procedures. These procedures would be reusable, and could relate to both repair and recurring work order types.

Please note that this editor allows the use of reusable tasks instructions. This does not mean you are required to use these reusable instructions in every case. It is perfectly acceptable, and in most cases advised to type in instructions directly into the document as needed.

Using the Documents Tree

To find how to use the **Documents Tree** found here, please refer to the ***Document Trees*** section of the ***Common Features*** chapter. Most of the options dealing with this tree are accessible by right mouse clicking from within the tree.

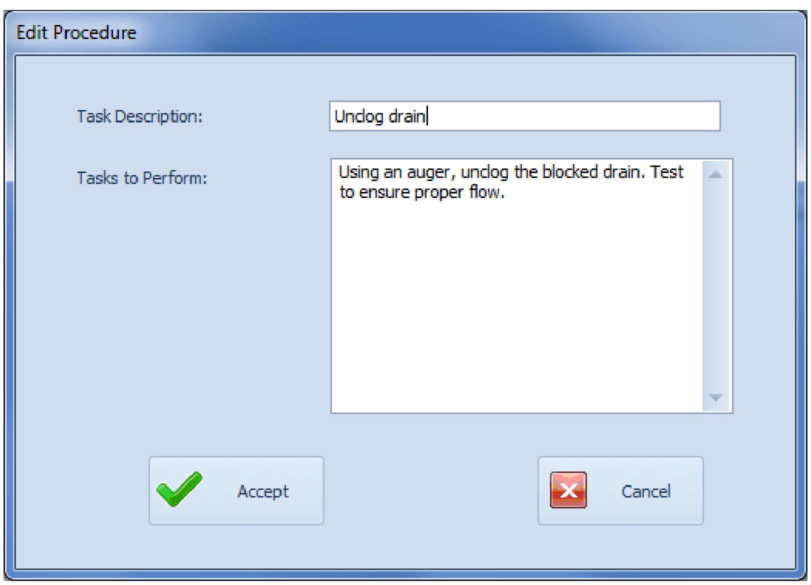
The following illustrates the popup menu that is accessible by right mouse clicking on various elements of the **Documents Tree**.



Add New Procedure to the Database

To add a new procedure to the database:

- Move to the **Documents Tree** and right mouse click on the folder you want to assign the new procedure to.
- From the invoke popup menu select the **Add Procedure** option.



- From the invoked ***Edit Procedure*** dialog, move to and click in the **Task Description** text box.
- Enter a descriptive title in the box provided. This **Task Description** can contain up to 40 alpha/numeric characters.
- Move to the **Tasks to Perform** text box and enter the actual procedure to store. There is no size limitation to the field.

- When done editing your new procedure, click on the **Accept** button.

Editing an Existing Procedure

To edit an Existing Procedure:

- Move to the **Procedures Tree** and right mouse click on the procedure you want to edit.
- From the invoked popup menu, click on the **Edit Procedure** option.
- Edit the Procedure is the same manner that it was created, clicking the **Accept** button when done.

Inserting Existing Procedures into the Document

The whole purpose of having a database of repair procedures is to be able to quickly reuse them in your documents. To insert a saved procedure into the current document:

- Click in your document where you would like the insertion to occur.
- Move to the **Document Tree** and select the document or procedure you want to insert.
- Move to the **Insertion Options** drop down and select the formatting option you want to apply to the procedure insertion. Available options include:
  - **Text Only**
  - **Check Off Brackets**
  - **Numbers and Brackets**
- Move to and click on the **Insert** (arrow) button (double clicking also works).
- Repeat the above procedures for each insertion.

Procedures Editor – Save and Close

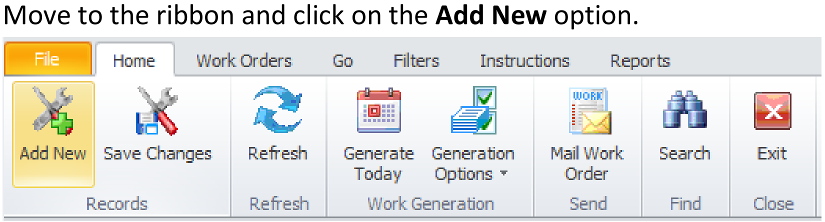
Whenever you either make changes using the *Repair Procedures Editor*, ensure to save your changes.

- Click on the **Save and Close** button to save and apply your changes.

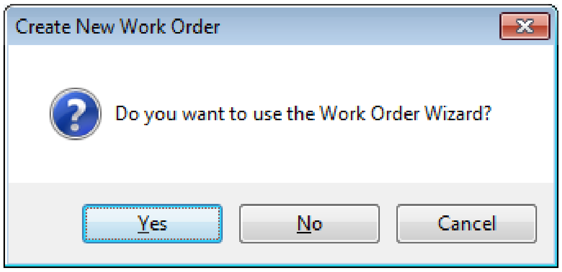
Creating a PM (Recurring) Work Order with Creation Wizard

This tutorial will outline the steps to follow in the creation of a recurring (PM) work order using the creation wizard.

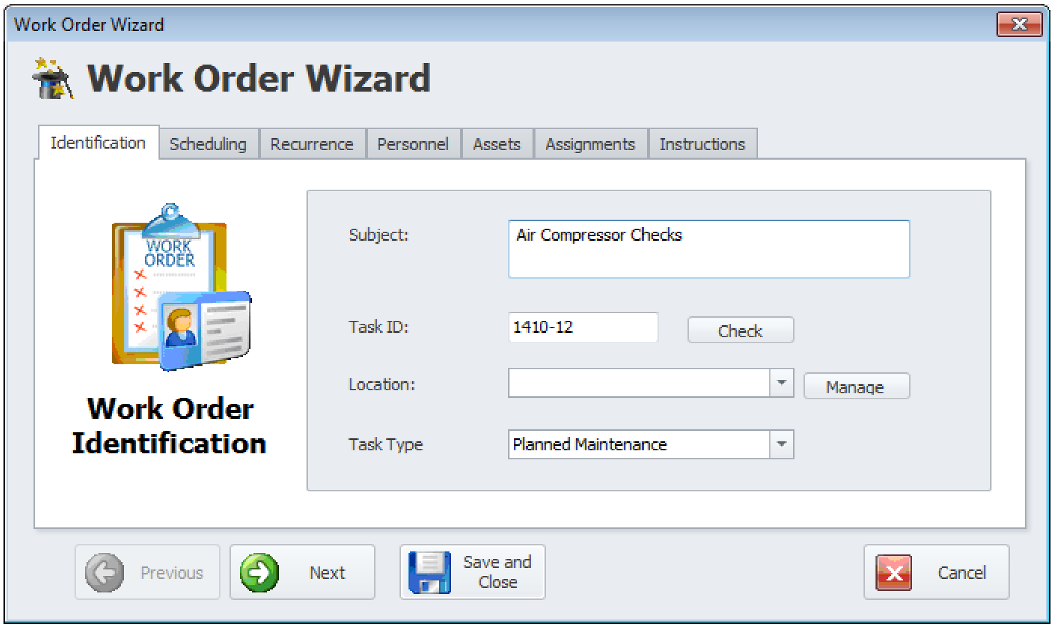
1. Move to the ribbon and click on the **Add New** option.



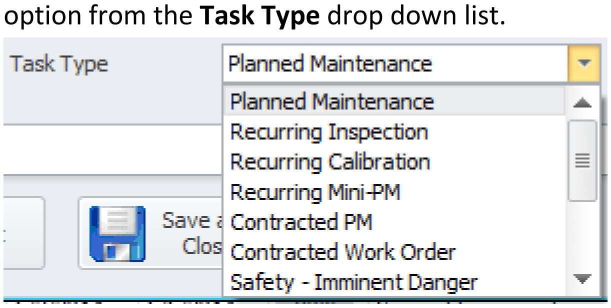
2. When prompt about using the Wizard, click **YES**.



3. From the invoked **Work Order Wizard**, move to the **Identification** tab.

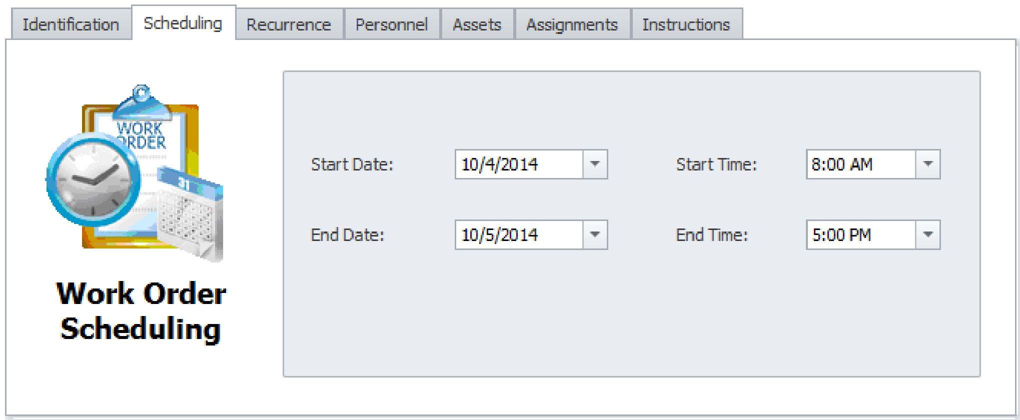


4. Click in the **Subject** text box and type in an identifying description of the work to be performed.
5. Click in the **Task ID** field and edit this information.
   The program will generate this ID for you and does not require modification. To check to see if the ID you supply is unique in the database, click on the **Check** button.
6. To assign a **Location** to the work order, click on the **down arrow** attached to the drop down list and select on the option of your choice.
7. Next you need to assign the work order a ‘Recurring’ task type. This is done by selecting an option from the **Task Type** drop down list.

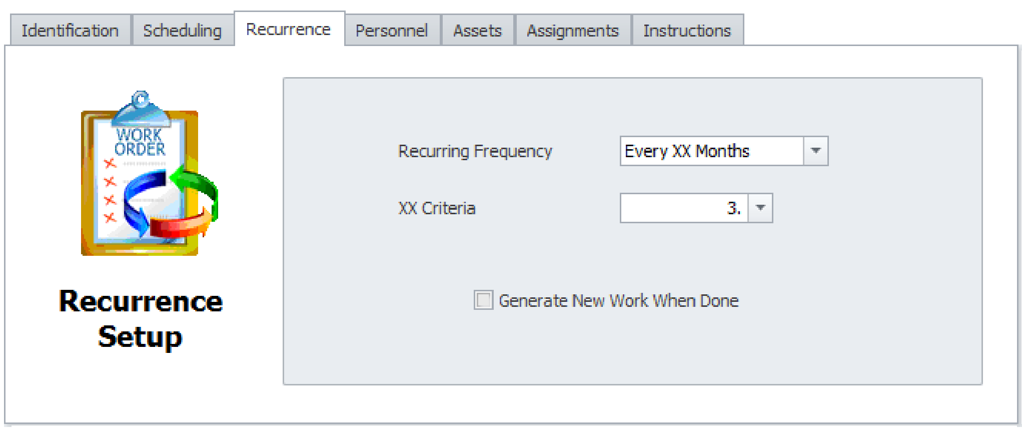


   There are 12 possible task types available, with 10 of these having user definable titles. Five of these task types are designated as recurring types of work orders, where the others are designated as repair, or one-time work orders types. See the ***Work Orders Setup*** section in this chapter for more information.

8. Click on the **Next** button to move to the **Scheduling** tab.
   This tab allows you to specify the scheduling for the new work order.



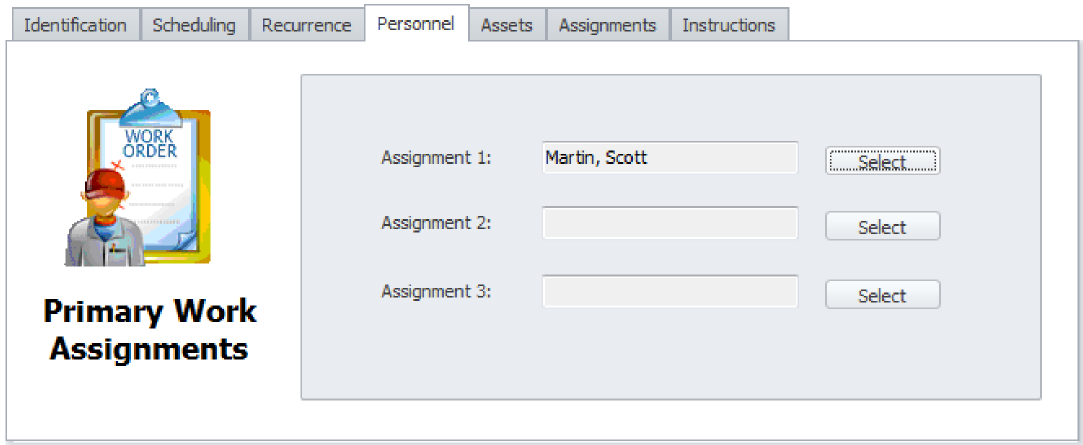
9. Move to both the **Start Date** and **End Date** fields and use the attached calendars to set when you expect work to begin and end on this work order.
10. Move to both the **Start Time** and **End Time** fields and using the attached drop down list, setup the values you want to assign.
11. Click on the **Next** button to move to the **Recurrence** tab.
    This tab is only available when one of the recurring task types is assigned on the **Identification** tab.



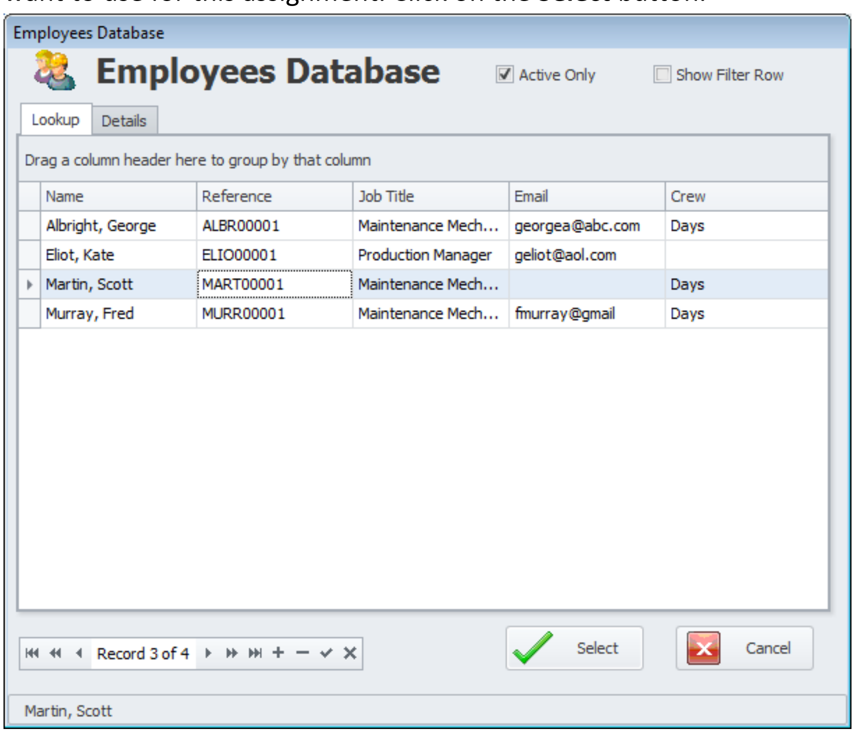
12. Move to **Recurring Frequency** drop down and select a recurring frequency for this work order.
13. If the selected **Frequency** has **XX** anywhere in its description, the **XX Criteria** value must also be provided. Set this value by typing in a numeric value in the space provided. You can also use the attached drop down calculator to set the value.
    *The value entered here replaces the 'XX' criteria of the selected frequency. For example, if you have a Frequency of 'Every XX Meters' selected, and you enter '3000' for the **XX Criteria**, the work order would regenerate 'Every 3000 Meters'.*
14. Check the **Generate New When Done** checkbox if you would like regeneration to occur only when the work order is marked as completed. If left uncheck, the work order will regenerate at

the assigned frequency regardless of task completion.
For more information look at the ***Generate New When Done*** section of this chapter.

15. Click on the **Next** button to move to the **Personnel** tab.
    This tab allows you to assign personnel or mechanics to the work order.

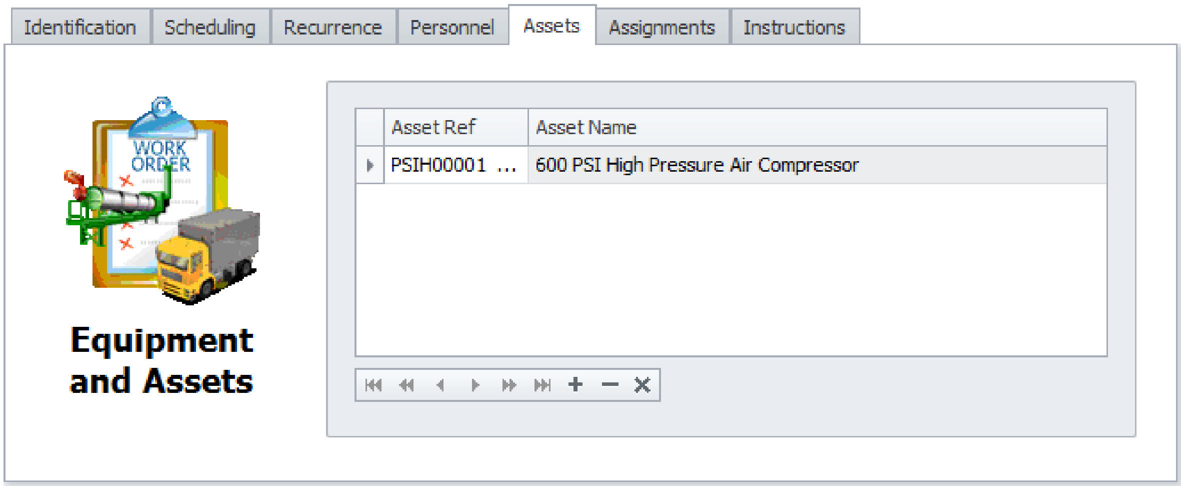


16. Move the **Assignment 1** area and click on the **Select** button found there. This will allow you to assign an employee to the work order.
17. From the invoked **Employees Database** dialog, move to the grid and select the employee you want to use for this assignment. Click on the **Select** button.

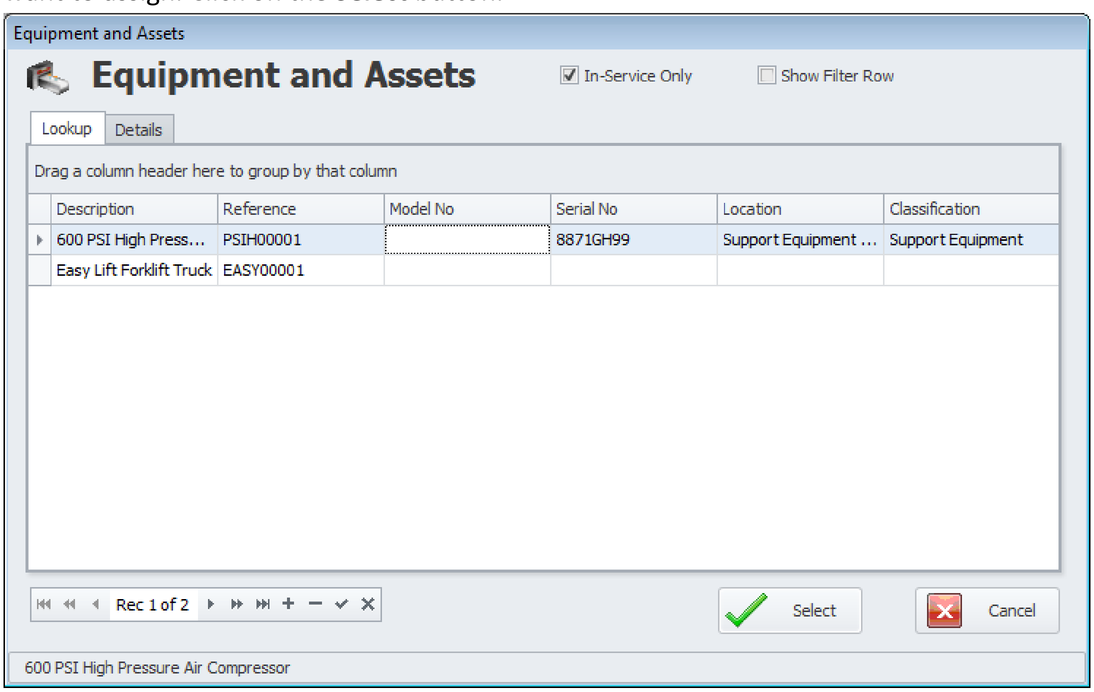


18. Optionally repeat the above step for the other two assignments.

19. Click on the **Next** button to move to the **Assets** tab.
    This tab allows you to assign equipment or assets to the work order.

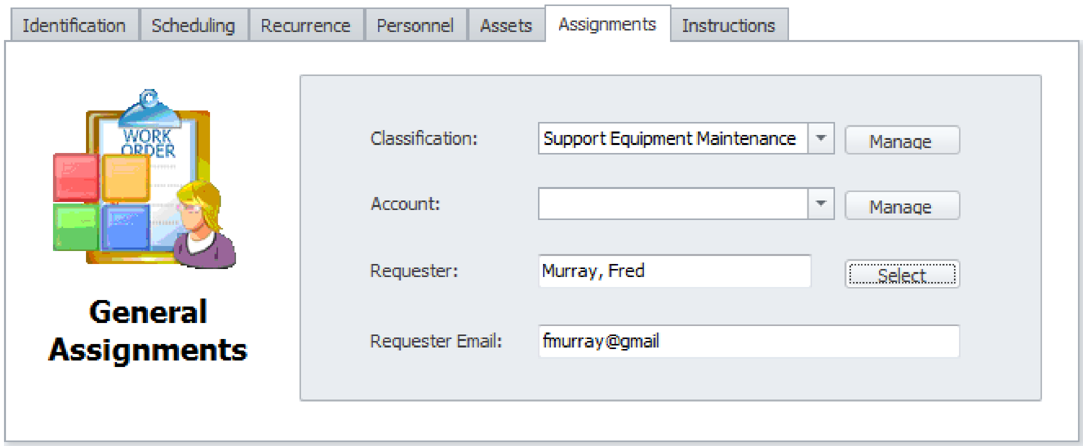


20. To add an Equipment or Asset assignment to the Work Order, locate the data control and click on the **Append** (+) button.
21. From the invoked **Equipment and Assets** dialog, move to the grid and select the record you want to assign. Click on the **Select** button.

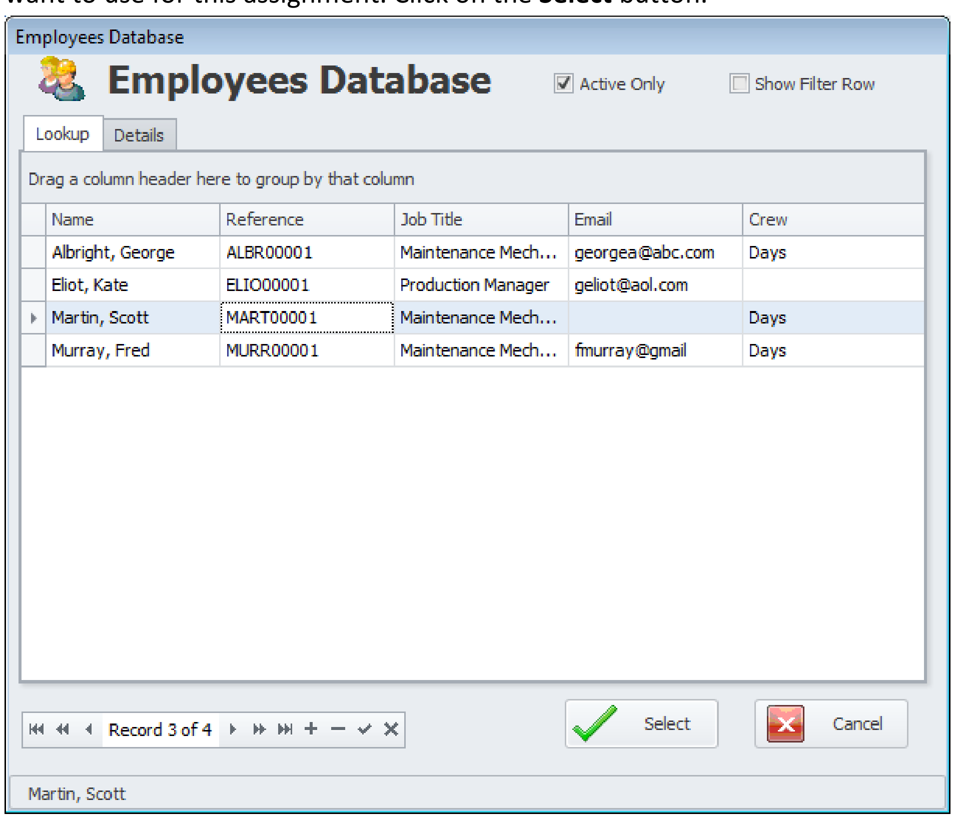


22. Optionally repeat adding assets as just outlined until all required assets have been included.

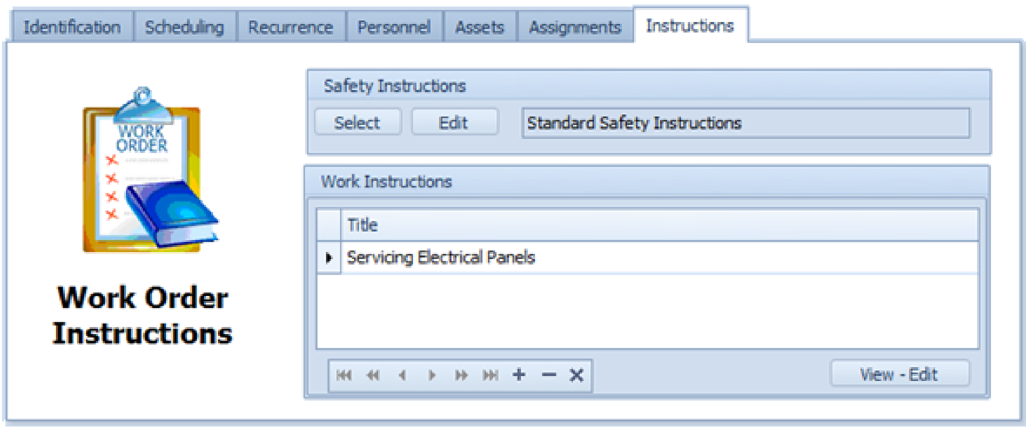
23. Click on the **Next** button to move to the **Assignments** tab.
    This tab allows you to make general assignments to the work order.



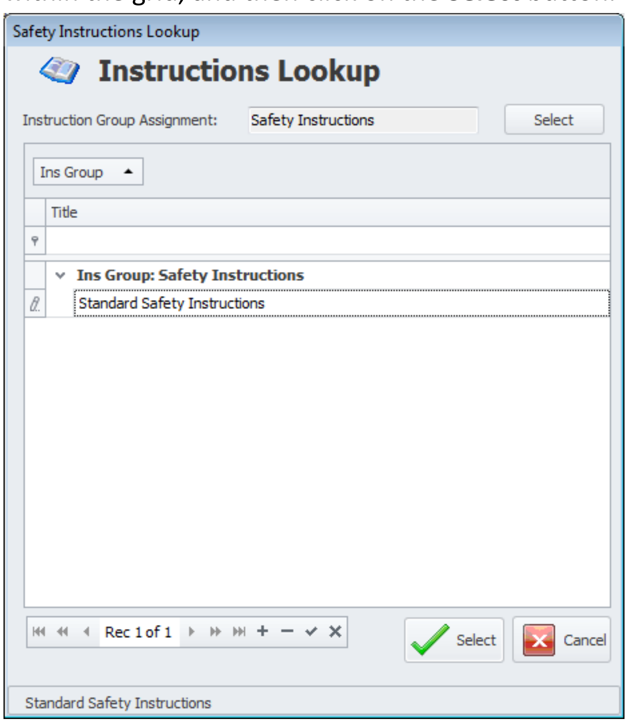
24. Move to the **Classification** drop down and select an assignment you want to use.
    Classifications are used to help group things for easier lookups and for reporting purposes.
25. Move to the **Account** drop down and select an assignment you want to use.
26. Move to the **Requester** field and type in the name of the person requesting this work to be performed. You can also select an employee by clicking on the **Select** button found here.
27. From the invoked **Employees Database** dialog, move to the grid and select the employee you want to use for this assignment. Click on the **Select** button.



28. Move to the **Requester Email** text box, and if not already inserted for you using the previous step, type in this information.
29. Click on the **Next** button to move to the **Instructions** tab.
    This tab will change depending if the work order task type is a one-time, or recurring work order.



30. Move to the **Safety Instructions** group and click on the **Select** button to assign a set of predefined safety instructions from instructions database.
31. From the invoked **Instructions Lookup** dialog, select the instructions you want to assigned from within the grid, and then click on the **Select** button.

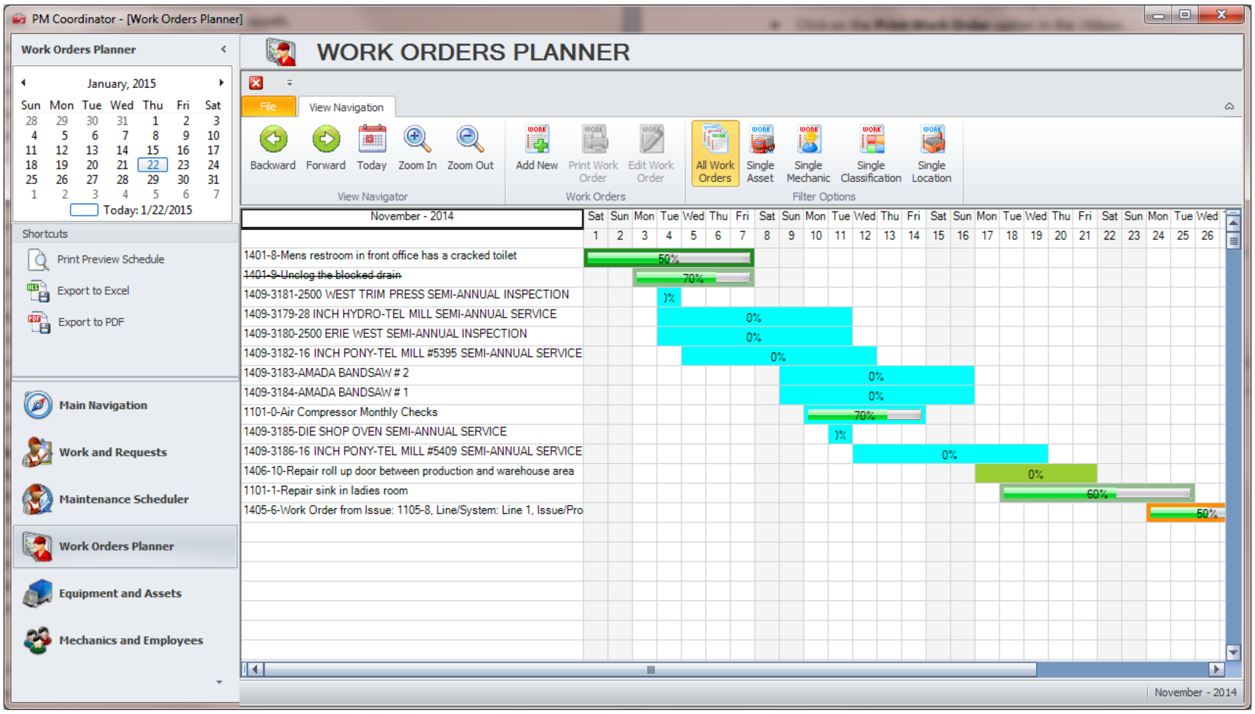


32. For recurring work orders continue next, else skip to step 36
33. Move to the **Work Instruction** group and click on the **Append** (+) button in the data control.
34. From the invoked **Instructions Lookup** dialog, select the instructions you want to assigned from within the grid, and then click on the **Select** button.

35. Repeat the above step for each set of instructions you want to assign.

Work Orders Planner

With the ***Work Order Planner*** option you can display and print the maintenance schedule for an entire month, create and edit existing work orders, export a copy of the planner to Excel and more.



To access the ***Work Order Planner***:

- Move to the Outlook styled – Navigational bar located on the left side of the screen.
- Click on the large group button with the caption: **Work Order Planner.**

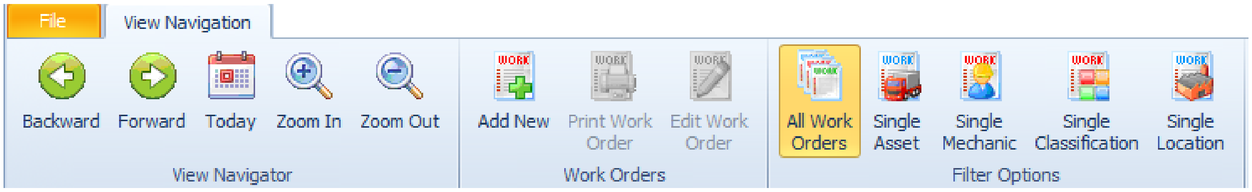
Or

- From the Main Scheduler, move to the **Go** tab in the ribbon.
- Locate the **Work Orders** group and click on the **Planner** option.

WO Planner – Ribbon

The ***Work Order Planner*** has its own ribbon control, and like the other ribbons found in the system, this ribbon has its available options arranged in logical groups.

The following illustration shows the **Planner's** ribbon:



The following are the elements on the **View Navigation** ribbon tab, reading left to right:

- **Backward** – This button moves the planner backwards in time, one month per click.
- **Forward** – This button moves the planner forward in time, one month per click.
- **Today** – Clicking this button moves you to the current month.
- **Zoom In** – Clicking this button zooms in on the current view.
- **Zoom Out** – Clicking this button zooms out on the current view.
- **Add New** – Invokes the Work Order Wizard that will allow you to create a new work order. Please refer to the *Work Order Wizard* section of this chapter on to use this wizard.
- **Print Work Order** – When a work order is selected, this option will provide a 'Print Preview' of the selected work order.
- **Edit Work Order** – When a work order is selected, this option will allow you to edit the selected work order with the *Work Order Wizard.*
- **All Work Orders –** Clicking this option will filter the Planner by all work orders assigned to the current month.
- **Single Asset –** Clicking this option will allow to select a single asset to filter the Planner's work orders by. To use this option:
    - Click on the **Single Asset** button to invoke the *Equipment and Assets* lookup dialog.
    - Move to the grid and select the record you want to filter by and click the **Select** button.
- **Single Mechanic –** Clicking this option will allow to select a single employee assignment to filter the Planner's work orders by. To use this option:
    - Click on the **Single Mechanic** button to invoke the *Employees Database* lookup dialog.
    - Move to the grid and select the record you want to filter by and click the **Select** button.
- **Single Classification–** Clicking this option will allow you to select a single classification assignment to filter the Planner's work orders by. To use this option:
    - Click on the **Single Classification** button to invoke the lookup dialog.
    - Move to the grid and select the record you want to filter by and click the **Select** button.
- **Single Location–** Clicking this option will allow you to select a single location assignment to filter the Planner's work orders by. To use this option:
    - Click on the **Single Location** button to invoke the lookup dialog.
    - Move to the grid and select the record you want to filter by and click the **Select** button.

Planner - Editing a Work Order

To edit a work order from within the Planner:

- Double click on the work order you want to edit, or click on the work order to select it and then click on the **Edit Work Order** option in the ribbon.
- Please refer to the ***Work Order Wizard*** section in this chapter on how to use the invoked wizard.

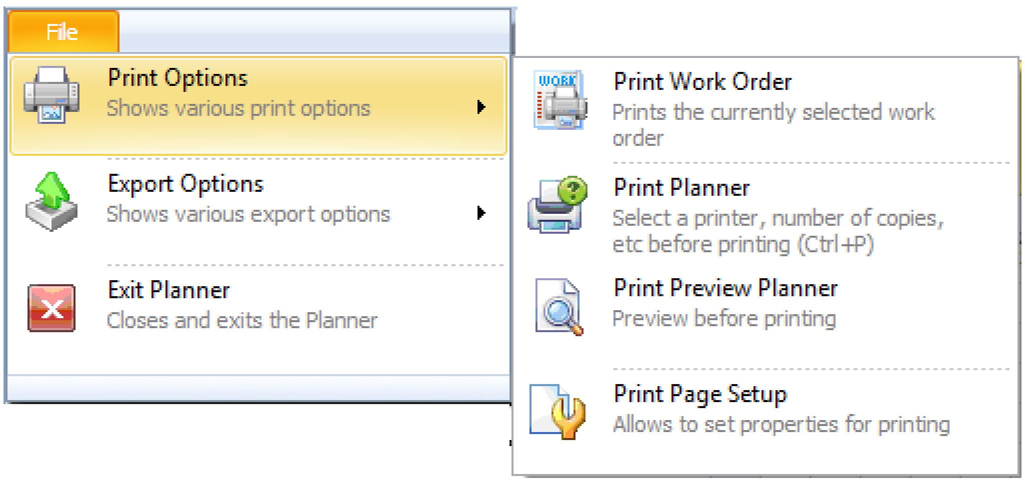
Planner - Printing a Work Order

To print a work order from the Planner:

- Select the work order from those displayed in the Work Order Planner.
- Click on the **Print Work Order** option in the ribbon.

Printing the Work Order Planner

To print the Work Order Planner's current view:



- Select the Month that you want to print.
- Open the **File** menu and expand the **Print Options** sub-menu.
- Click on the Print option of your choice.

Exporting the Work Order Planner

To export the current **Work Order Planner** view:

- Select the Month that you want to export.
- Open the **File** menu and expand the **Export Options** sub-menu.
- Click on the Export option of your choice. Available options include:
    - **Export to Excel**
    - **Export to PDF**
    - **Export to HTML**

Navigating through The Work Order Planner

There are couple of different ways to navigate through the months of the **Work Order Planner**.

Navigating with the ribbon control

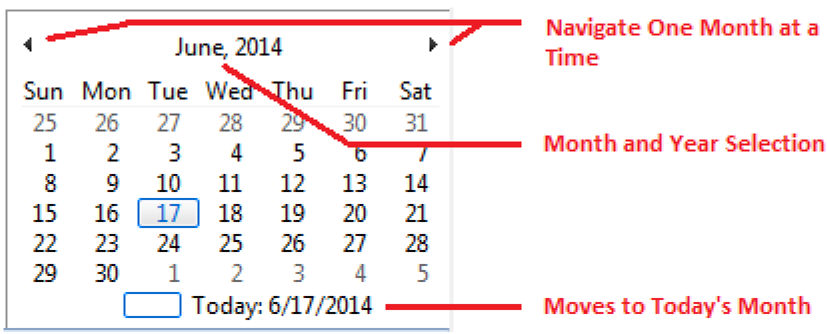
To navigate through the Work Order Planner using the ribbon control:

- **Backward** – This button moves the planner backwards in time, one month per click.
- **Forward** – This button moves the planner forward in time, one month per click.
- **Today** – Clicking this button moves you to the current month.

Navigating with the Shortcut bar's Calendar

You can use the Calendar located in the Shortcut bar to navigate through the months of the **Work Order Planner**.

The following illustrates the main elements of this calendar:

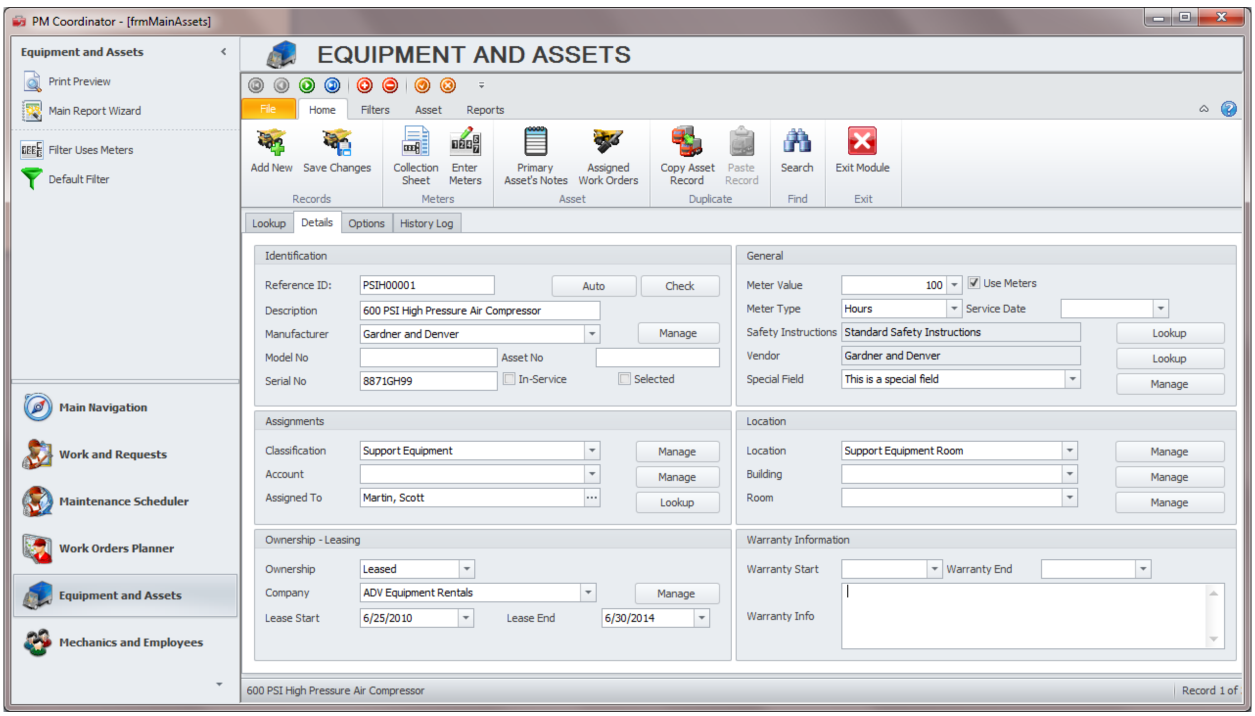


Clicking on any date within this calendar will have the Work Order Planner move to the selected month.

Equipment and Assets

The **Equipment and Assets** module is where you record information about your equipment, machinery and other assets. You can maintain information such as asset numbers, location, warranty information, leasing information, and more.

The built in equipment notes and documents feature makes use of our built in word processor. Here you can record endless amounts of information and this word processor supports multiple fonts, colors, tables and more. With the **History Log** feature you can keep a complete maintenance history on your assets. This can include the date it was installed, maintenance performed, etc. This information can be entered manually, or by the click of a button from the *Maintenance Scheduler*, *Work Orders* and *Issues* modules.

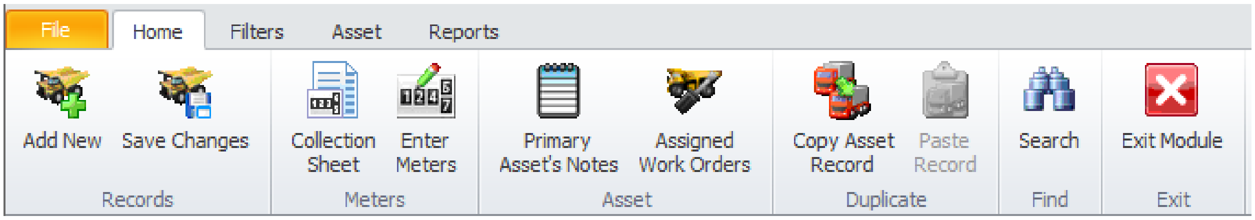


Equipment can also be assigned to different properties or locations. This information can be set to follow the asset when assigned to work orders. You can also setup default safety instructions for each of your assets. This information can then be automatically inserted into work orders when the equipment is assigned to the work order.

Ribbon Control

The comprehensive functionality of the ***Equipment and Assets*** module is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

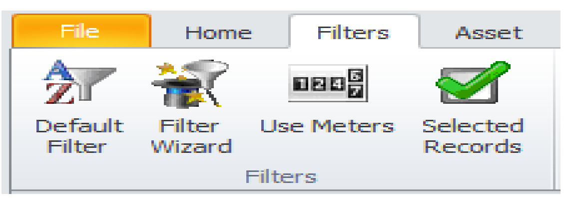
HOME TAB



The following are the elements on the **Home** ribbon tab, reading left to right:

- **Add New** – Creates a new blank record in the database.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Collection Sheet** – Prints a meters collection sheet returning all assets that has the **Use Meters** option selected.
- **Enter Meters** – Invokes the **Enter Meter Readings** dialog that allows you to enter meter readings for multiple assets at once.
- **Primary Asset's Notes** – Uses the built-in word processor to maintain detailed notes on each asset.
- **Assigned Work Orders** – Allows the viewing and printing of open work orders assigned to the current asset.
- **Copy Asset Record** – Makes a copy of the primary fields of the selected record.
- **Paste Record** – Pastes a previous copied record over the current record.
- **Search -** Invokes the search/find routine on the Lookup Grid.
- **Exit Module** - Close and exits the module.

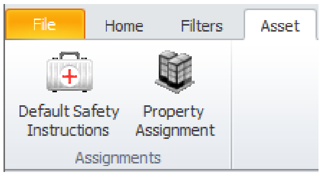
FILTERS TAB



The following are the elements on the **Filters** ribbon tab, reading left to right:

- **Default Filter** – Shows every record in the database.
- **Filter Wizard** - Launches the **Custom Filter Wizard** dialog that allows specific criteria to be setup to filter the database by.
- **Use Meters** - Shows all assets that have the **Use Meters** option selected.
- **Selected Records** - Shows all assets that have the '**Selected'** option checked.

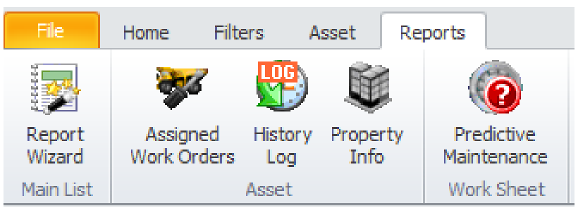
ASSET TAB



The following are the elements on the **Asset** ribbon tab, reading left to right:

- **Default Safety Instructions** - Allows you to assign the default safety instructions to use in the creation of new work orders and for the current asset.
- **Property Assignment** – Allows you to assign the current asset to a specific property.

REPORTS TAB



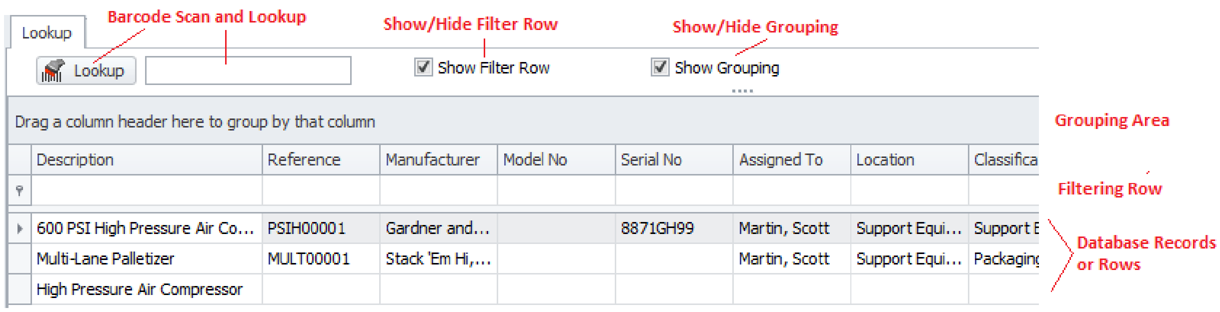
The following are the elements on the **Reports** ribbon tab, reading left to right:

- **Report Wizard** – Invokes the ***Report Wizard*** to help in the creation of a report.
- **Assigned Work Orders** – Invokes a wizard in the creation of an assigned work orders report.
- **History Log** – Prints a date range of log entries as it applies to the current asset.
- **Property Information** – Print information on the assigned property.
- **Predictive Maintenance** – Uses a wizard in the creation of a predictive maintenance worksheet type report.

Lookup Tab

This tab helps in locating assets by grouping, filtering and sorting them. All the assets in the current filter are located in the grid found here. To select an asset and make it the active record, the user needs only to click on the asset from within the grid. Once selected the user can click on the other tabs to view or edit the asset itself.

The following image illustrates the features available on the **Lookup** tab:



The functions of the **Lookup** tabs are used through-out the system and are fairly common regardless of the modules that use them. Please review the chapter on ***Common Features*** to read about the functionality of the controls located on this tab.

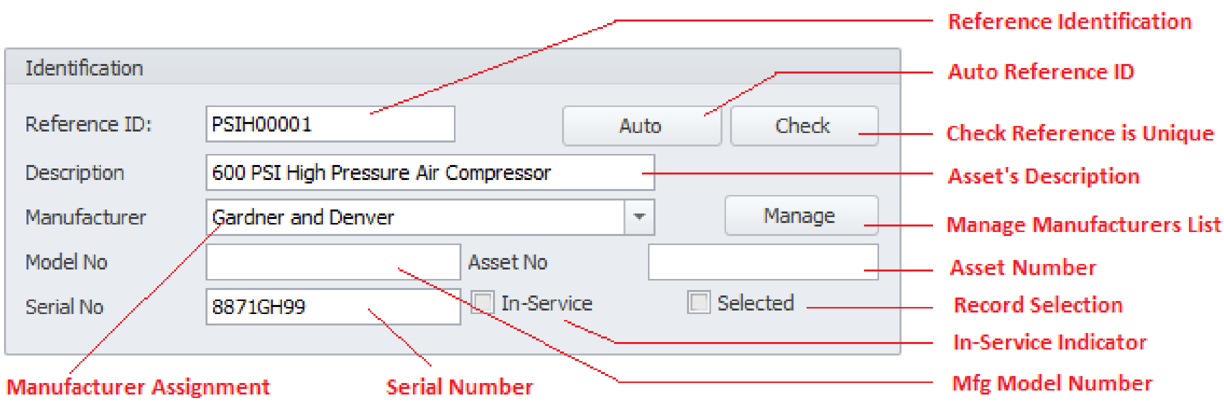
Details Tab

Under the Details tab you can setup your identification information, and general assignments for selected assets.

Identification

This section allows you to specify a description, reference ID, manufacturer and other general information specific to the current asset.

The following illustrates the elements found in this section:



Reference ID

This field should be unique in your database, but it's not an enforced rule. It is used to help identify your assets, and is also used in conjunction with barcode scans. Edit this field by typing in the space provided. This field can accept up to 30 alpha/numeric characters.

Once the **Description** field has been entered you can click on the **Auto** button to have the application create this field for you.

To insure the **Reference ID** is unique in the database, click on the **Check** button.

Description

This field should provide a brief description of the asset. This field can contain up to 60 alpha/numeric characters.

Manufacturer

This field can contain up to 40 alpha/numeric characters and is used to indicate the manufacturer of the asset.

Model No

This field can contain up to 30 alpha/numeric characters and is used to indicate the manufacturer’s model number.

Asset No

This field can contain up to 30 alpha/numeric characters and is used to indicate the accounting asset number. It would be acceptable to interchange this and the reference number fields.

Serial No

This field can contain up to 40 alpha/numeric characters and is used to indicate the manufacturers supplied serial number.

In-Service

When checked, this field would indicate the asset is currently in use.

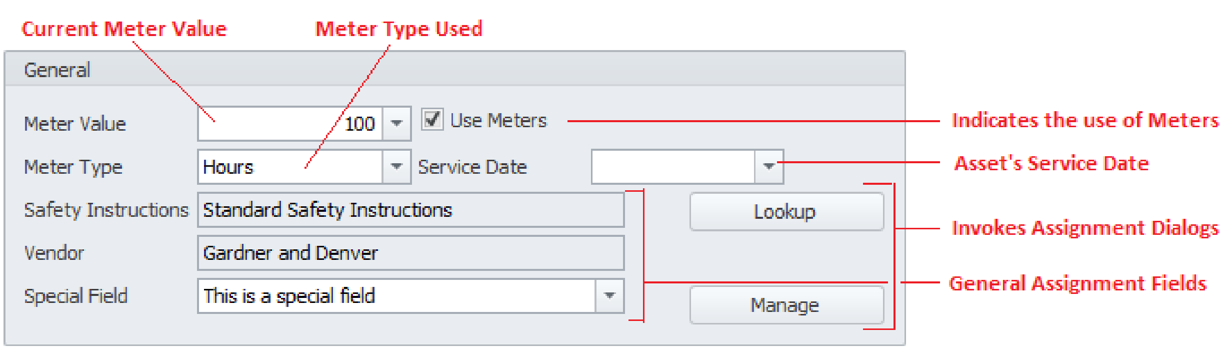
Selected

When checked, this field would indicate the asset is selected. This is used with filtering and for barcode label printing routines.

General

This section allows you to record general information about the current asset.

The following illustrates the elements found in this section:



Meter Value
If the current asset uses meters such as mileage, hours, etc., you will want to record this value here. This field accepts numeric values only, and *does not support the use of commas*. You can use the drop down calculator to edit this value. There are also other areas of the application that can be used to edit this value.

Use Meters
When checked, this would indicate that the current asset uses meters. This will allow the asset to show up in meter collection routines and reports.

Meter Type
Selectable from the drop down list, this field indicates the type of meter in use.

Service Date
This date field would indicate the date the asset was put in-service. You can set this date with the drop-down calendar.

Safety Instructions
This is the default safety instructions that will be assigned to new work orders as this asset is added to them. To assign these default instructions:

- Click on the **Lookup** button adjacent to this field.
- From the invoked list, click on the instructions you want to assign from those displayed in the grid and click on the **Select** button.

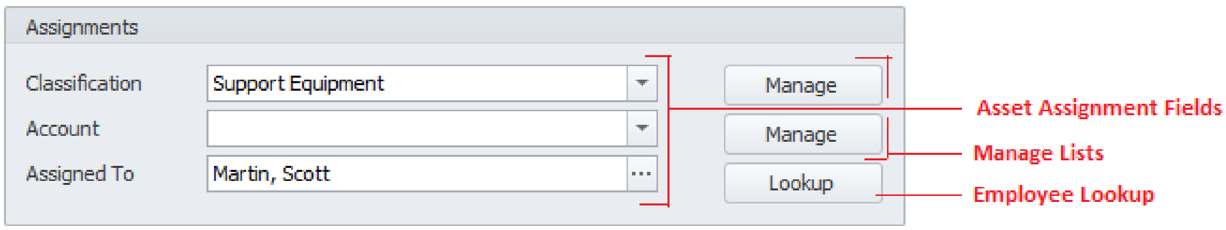
Note: These instructions are created in the ***Maintenance Scheduler*** module.

Vendor
This field is used to identify the primary vendor for this record. This field can contain up to 40 alpha/numeric characters.

Special Field
This is a special field that you can record whatever information you want. This field can contain up to 30 alpha/numeric characters.

Assignments
Assignment can be used for both filtering and report creation.

The following illustrates the elements found in this section:



Classification

Classifications are used throughout the system and are ideal for grouping things for filtering and reporting purposes. This field can contain up to 30 alpha/numeric characters. You can assign this field by selecting from the drop down list, clicking the **Manage** button, or typing in to the field.

Account

Accounts are used throughout the system and are ideal for grouping things for filtering and reporting purposes. This field can contain up to 30 alpha/numeric characters. You can assign this field by selecting from the drop down list, clicking the **Manage** button, or typing in to the field.

Assigned To

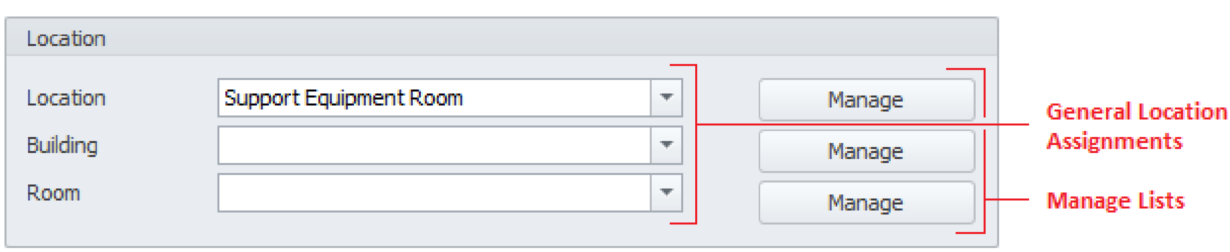
The **Assigned To** field is used in a similar way as the two fields above. This field can contain up to 40 alpha/numeric characters. You can type directly into this field or select an employee from a list. To select from a list:

- Click on the **Lookup** button adjacent to this field.
- From the invoked list, click on the record you want to assign from those displayed in the grid and click on the **Select** button.

Location

This section allows you to specify the asset's location. This feature can be used separately, or used in conjunction with Property Assignments features.

The following illustrates the elements found in this section:

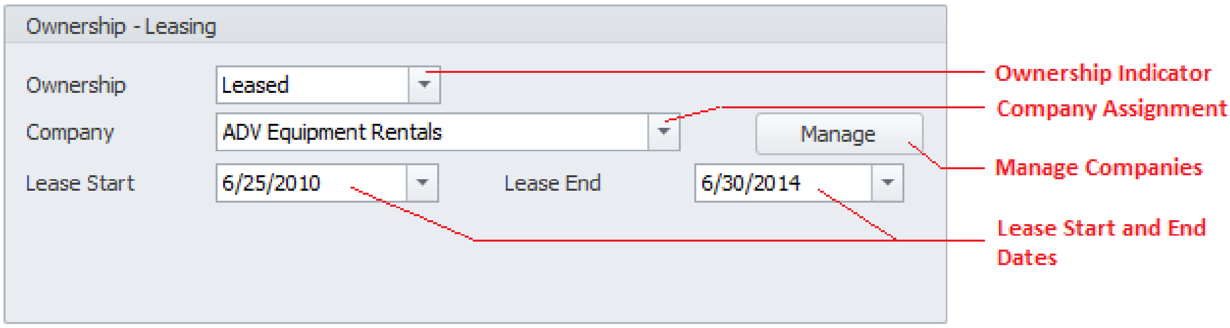


All three of these fields can be set from the down drop lists attached to them, or you can type directly into these fields. These fields can contain up to 30 alpha/numeric characters.

Ownership – Leasing

This section allows you to record asset ownership information and leasing information that may apply.

The following illustrates the elements found in this section:



Ownership

Selectable from the drop down list, this field indicated asset ownership. Options include: Company Owned, Client Owned and Leased.

Company

This field can contain up to 40 alpha/numeric characters, and can be directly typed or selected from the drop down list.

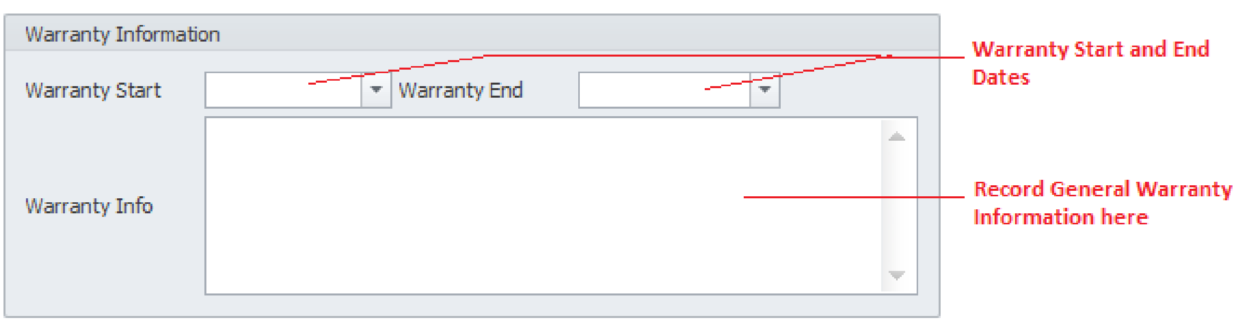
Lease Start – Lease End Dates

These are date only fields, and can be set by accessing the attached drop down calendars.

Warranty Information

This section allows you to maintain any warranty information that may apply to the selected asset.

The following illustrates the elements found in this section:



Warranty Start – Warranty End Dates

These are date only fields, and can be set by accessing the attached drop down calendars.

Warranty Info

Use this field to record any warranty related information about the current asset. This field has no built-in size limitation and can contain alpha and numeric characters.

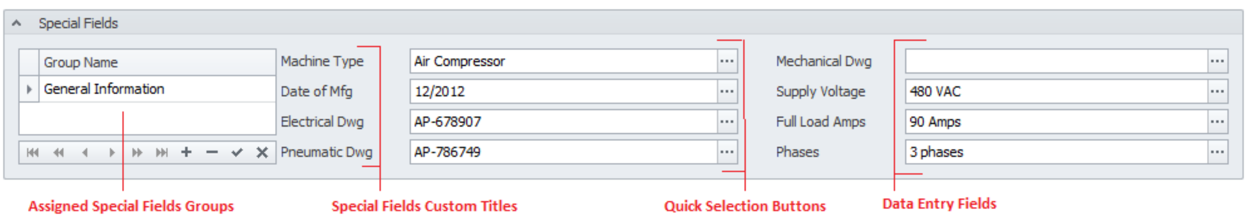
Options Tab

Under the Options tab you can setup general assignments for selected assets, and other more advanced options are available.

Special Fields

This section allows you to create and use **Special Fields**. **Special Fields** can be thought of as groups of User Defined Fields. Each group can have a Group Name and 8 fields with user defined titles.

The following illustrates the elements found in this section:



For more information about this feature please refer to the ***Special Fields*** section of the ***Common Features*** chapter.

Manage Selected Special Fields

To setup the titles for the current set of special fields:

- Select the **Special Fields** group as found on the **Options** tab and within the grid.
- Open the **File** menu and expand the **Manage Special Fields** sub menu.
- Click on the **Manage Selected Fields** option.

The *Equipment and Assets* module has an additional feature not discussed in the ***Common Features*** chapter, and this is **Pre-Defined** set of fields. To use the Pre-defined fields:

- From the **Asset's User Defined Fields** dialog, move to the **Pre-Defined Fields** drop down list and select the pre-defined group of your choice.
- Click the **Set Fields** button.

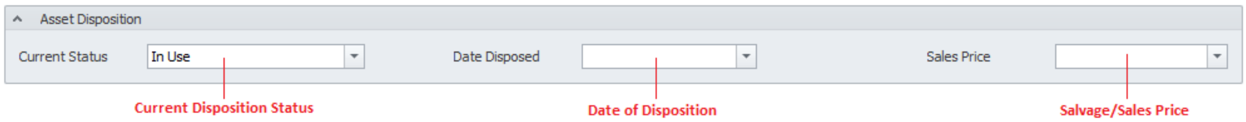
WARNING: The above action will overwrite the existing user titles.

For more information about this feature please refer to the ***Special Fields*** section of the ***Common Features*** chapter.

Asset Disposition

This section allows you to record information about assets that are no longer in use.

The following illustrates the elements found in this section:



Current Status

This option can be set from the drop down list. Available options include: In Use, Disposed, Sold/Scraped.

Date Disposed

This date field would indicate the date the asset was taken out of service. You can set this date with the drop-down calendar.

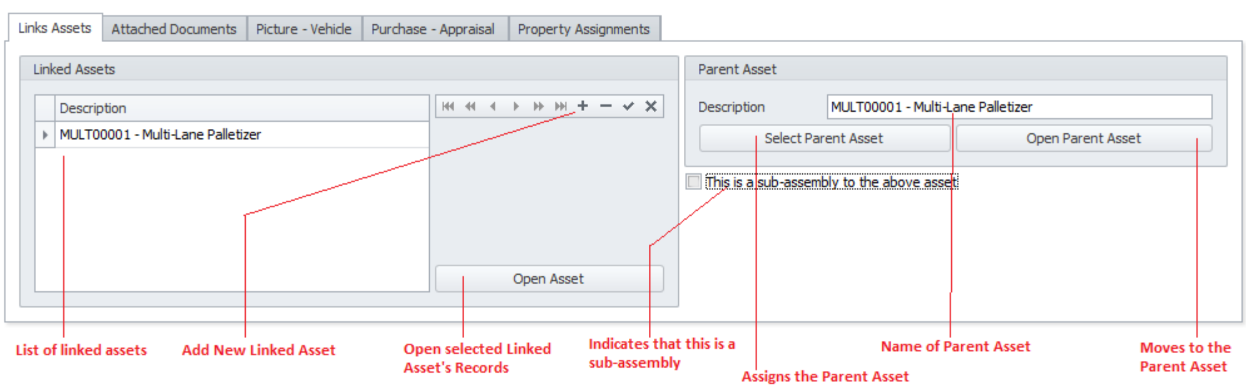
Sales Price

This field would indicate any monies collected in the disposable of the asset.

Linked Assets

You can link an asset record to a countless number of other assets. This comes in handy for parent/sub-assembly support where you can also mark the record as a sub-assembly, and then link it to a parent record. You can also reverse this role and link parent records to their subordinates.

The following illustrates the elements found in this section:



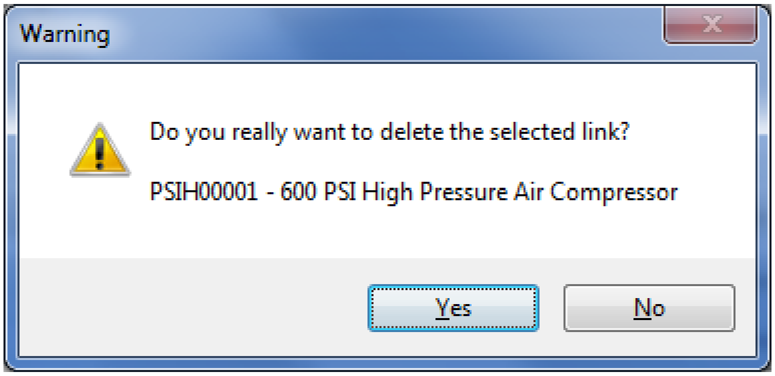
To add Linked Assets

- Move to the **Options** tab of the assets database, and then click on the **Linked Assets** tab near the bottom.
- Move to the data control found in the **Linked Assets** group and click on the **Append** (+) button.
- From the invoked **Lookup** dialog, move to the grid and select the record you want to link to.

- Click on the **Select** button.
- Click on the **Post** (checkmark) button in the data control to save your changes.

To delete a Link

- Move to the **Options** tab of the assets database, and then click on the **Linked Assets** tab near the bottom.
- Move to the **Linked Assets** grid and select the record you want to remove.
- Move to the data control found in the **Linked Assets** group and click on the **Delete** (-) button.



- When prompted about the deletion, click on the **Yes** button.
- Click on the **Post** (checkmark) button in the data control to save your changes.

To open a link and move focus to that record

- Move to the **Options** tab of the assets database, and then click on the **Linked Assets** tab near the bottom.
- Move to the **Linked Assets** grid and select the record you want branch to.
- Click on the **Open Asset** button.

To set the Parent Asset

- Move to the **Options** tab of the assets database, and then click on the **Linked Assets** tab near the bottom.
- Move to the **Parent Asset** group and click on the **Select Parent Asset** button.
- From the invoked **Lookup** dialog, move to the grid and select the record you want to link to.
- Click on the **Select** button.

To open the Parent Asset Record

- Move to the **Options** tab of the assets database, and then click on the **Linked Assets** tab near the bottom.
- Move to the **Parent Asset** group and click on the **Open Parent Asset** button.

To set the current asset as a Sub-Assembly

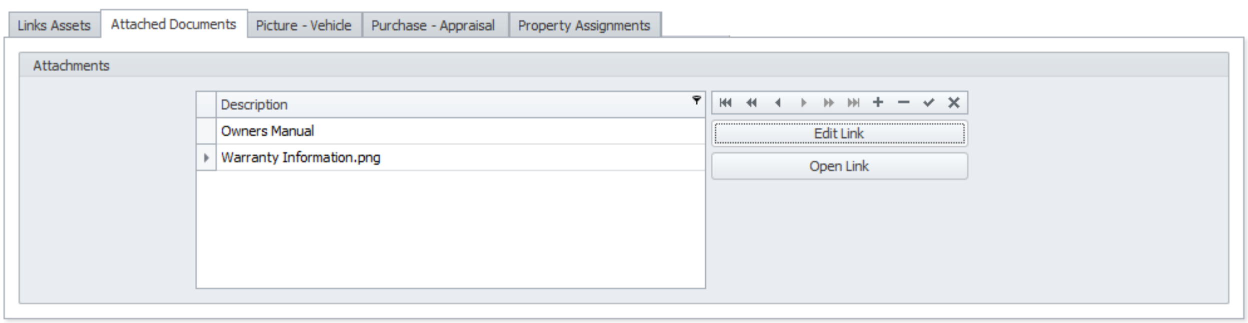
- Move to the **Options** tab of the assets database, and then click on the **Linked Assets** tab near the bottom.

- Check the '**This is a Sub-Assembly to the Above Asset'** checkbox.

Attached Documents

You can attach as many external files as you would like to a record. These attachments can include images, mechanical drawings, PDF files, MSDS sheets and more. For more information on this feature, please refer to the ***Attachments*** section of the ***Common Features*** chapter.

The following illustrates the elements found in this section:



To access the attachments:

- Move to the **Options** tab of the assets database, and then click on the **Attached Documents** tab near the bottom.

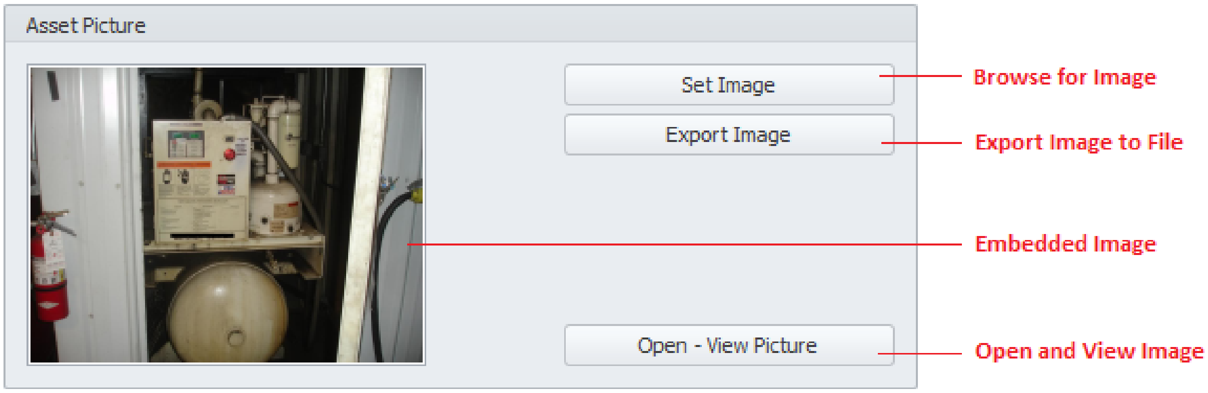
Asset's Picture

It is recommended to use file attachments for pictures, but you can also save a picture directly in the database. The reason attachments are recommended is because they use a lot less database space as compared to imbedded pictures.

To access the asset's picture:

- Move to the **Options** tab of the assets database, and then click on the **Picture - Vehicle** tab near the bottom.

The following illustrates the elements found in this section:



To set the Image

- Click on the **Set Image** button.
- Using the invoked file open type dialog, browse to where you have your image stored. The following formats are supported: bmp, gif, jpg, ico, and png.
- Select the image file by clicking on it and then click the **Open** button.

To export the stored Image

- Click on the **Export Image** button.
- Browse to where you want to save the file.
- Type in a name for your file in the **File name** text box.
- Move to the **Save as type** drop down list and select the file type to save as.
- Click on the **Save** button.

To view the stored Picture

- Click on the **Open – View Picture** button. The image should open in the default picture application as setup on your computer.

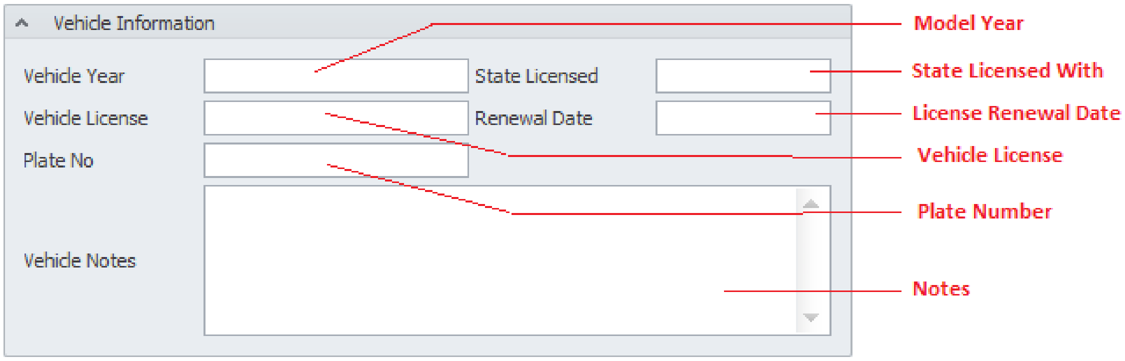
Vehicle Information

If the selected asset is considered a vehicle, you may want to record vehicle specific information in this section.

To access the Vehicle Information:

- Move to the **Options** tab of the assets database, and then click on the **Picture - Vehicle** tab near the bottom.

The following illustrates the elements found in this section:



- **Vehicle Year** - This field accept up to 4 alpha/numeric characters.
- **State License** - This field accept up to 20 alpha/numeric characters.
- **Vehicle License** (#) - This field accept up to 20 alpha/numeric characters.
- **Renewal Date** - This field accept up to 8 alpha/numeric characters.
- **Plate No** - This field accept up to 20 alpha/numeric characters.
- **Vehicle Notes** – There is no size limitation on the field.

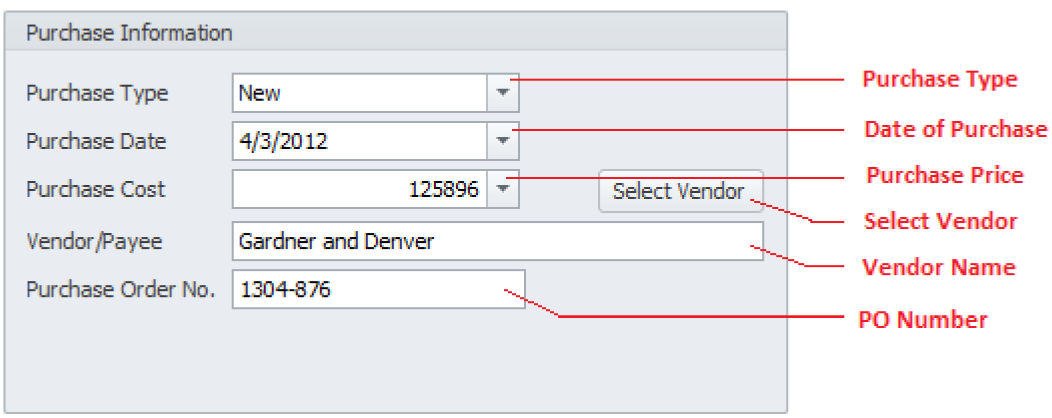
Purchase Information

In this section you can maintain information on the purchase of the selected asset.

To access the Purchase Information:

- Move to the **Options** tab of the assets database, and then click on the **Purchase - Appraisal** tab near the bottom.

The following illustrates the elements found in this section:



- **Purchase Type** - Select either **New** or **Used** from the drop down list
- **Purchase Date** - You can set this value using the attached drop down calendar.
- **Purchase Cost** – You can assign this value using the attached calculator, and this would indicate the price paid in the asset's purchase.

- **Select Vendor** – Clicking this button invokes the ***Vendors Lookup*** Dialog when you can select and assign a vendor.
- **Vendor/Payee** – This field can accept up to 40 alpha/numeric characters and would indicate who the asset was purchased from.
- **Purchase Order No** - This field can accept up to 30 alpha/numeric characters and would indicate the purchase order that was used in the asset's purchase.

Appraisal Information

You can calculate an asset's depreciation using either the *double-declining balance* method or the *straight-line depreciation* method.

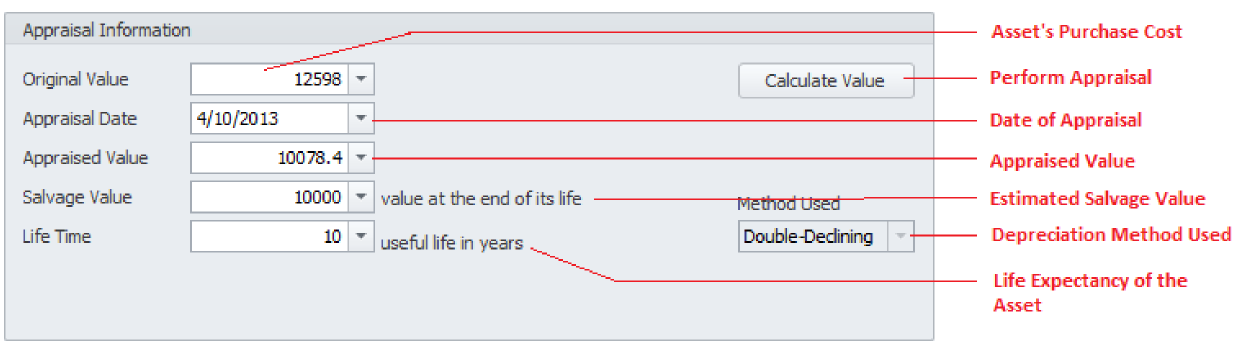
When using this option you will need the following information available:

- The initial cost of the asset.
- The asset's useful life in months.
- The salvage value of the asset at the end of its life.
- The current year in the depreciation calculation.

To access the **Appraisal Information**:

- Move to the **Options** tab of the assets database, and then click on the **Purchase - Appraisal** tab near the bottom.

The following illustrates the elements found in this section:



Appraisal Initial Setup

Before attempting to run the appraisal routine, the following information should be entered into the application:

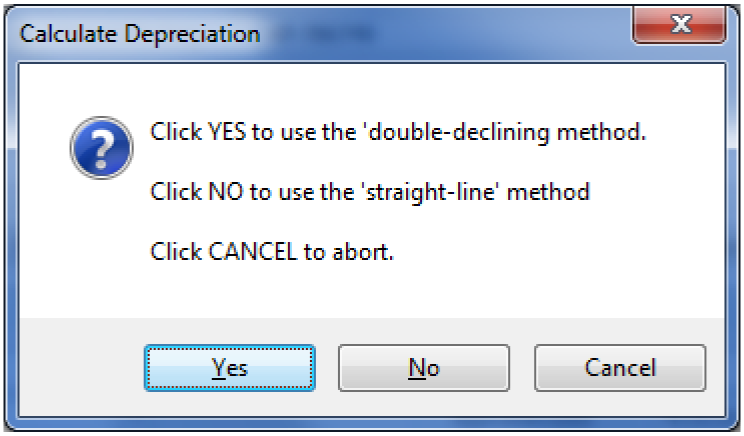
- **Original Value** – You can set this value using the attached calculator. This value would indicate the purchase cost associated with the current asset.
- **Salvage Value** - You can set this value using the attached calculator. This value would indicate the amount you think you can sell the asset for, once deposed.

- **Life Time** – You can set this value using the attached calculator. This value would indicate how long you expect the asset to be in use.

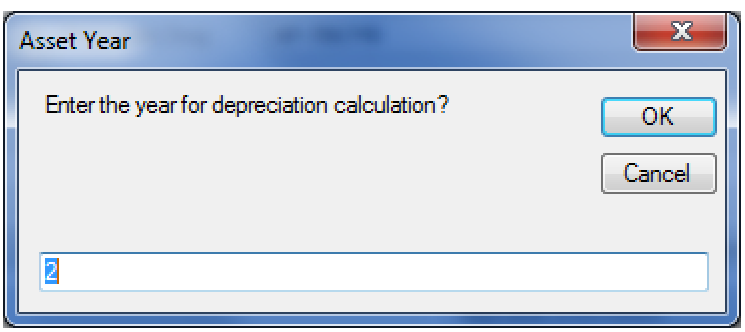
Performing the Appraisal

Once the Initial setup is completed, use the following to perform the actual appraisal:

- Move to and click on the **Calculate Value** button.



- There are two accounting methods available. To use the default 'double-declining' method click on the **Yes** button to the prompt. To use the 'straight-line' method, click on the **No** button.
- When prompted about the asset's initial costs, confirm or edit the value shown and click **OK**.
- When prompted about the asset's salvage value, confirm or edit the value shown and click **OK**.
- When prompted about the asset's useful life in Years, confirm or edit the value shown and click **OK**.

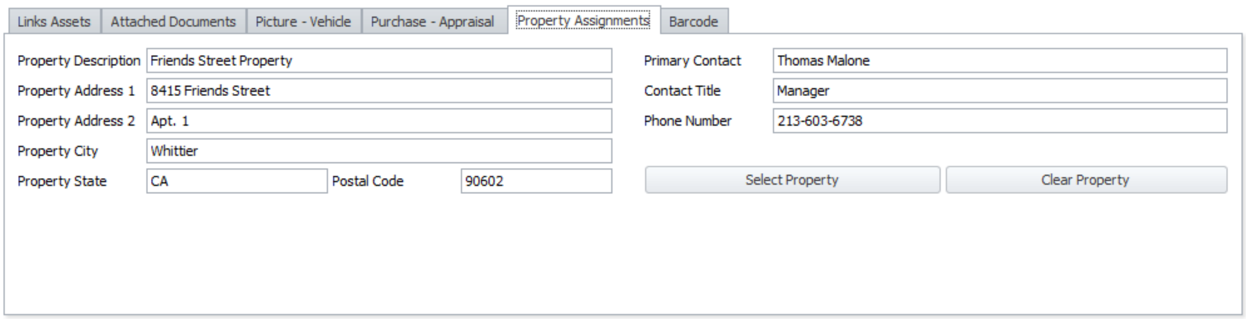


- When prompted about the **Asset Year**, confirm or edit the value shown and click **OK**.
- The program will now perform the calculation and put the resulting value in the **Appraised Value** field.
- Move to the **Appraisal Date** field and edit this value to show the date of the appraisal.

Property Assignment

You can assign all your equipment and assets to different properties and locations. When you assign an asset as the **Primary Asset** of a work order, the property assignment automatically follows that asset assignment.

The following image illustrates this assignment:



To make a Property Assignment:

- Move to the **Options** tab of the assets database, and then click on the **Property Assignments** tab near the bottom.
- Click on the **Select Property** button.
- From the invoked **Properties and Locations** dialog move to the grid and select the property you want to assign.
- Click on the **Select** button.

Properties Database

You can build a database of Properties within this module. These properties can then be assigned to an asset, which in turn adds the assignments for use with work orders.

Access the Properties Database

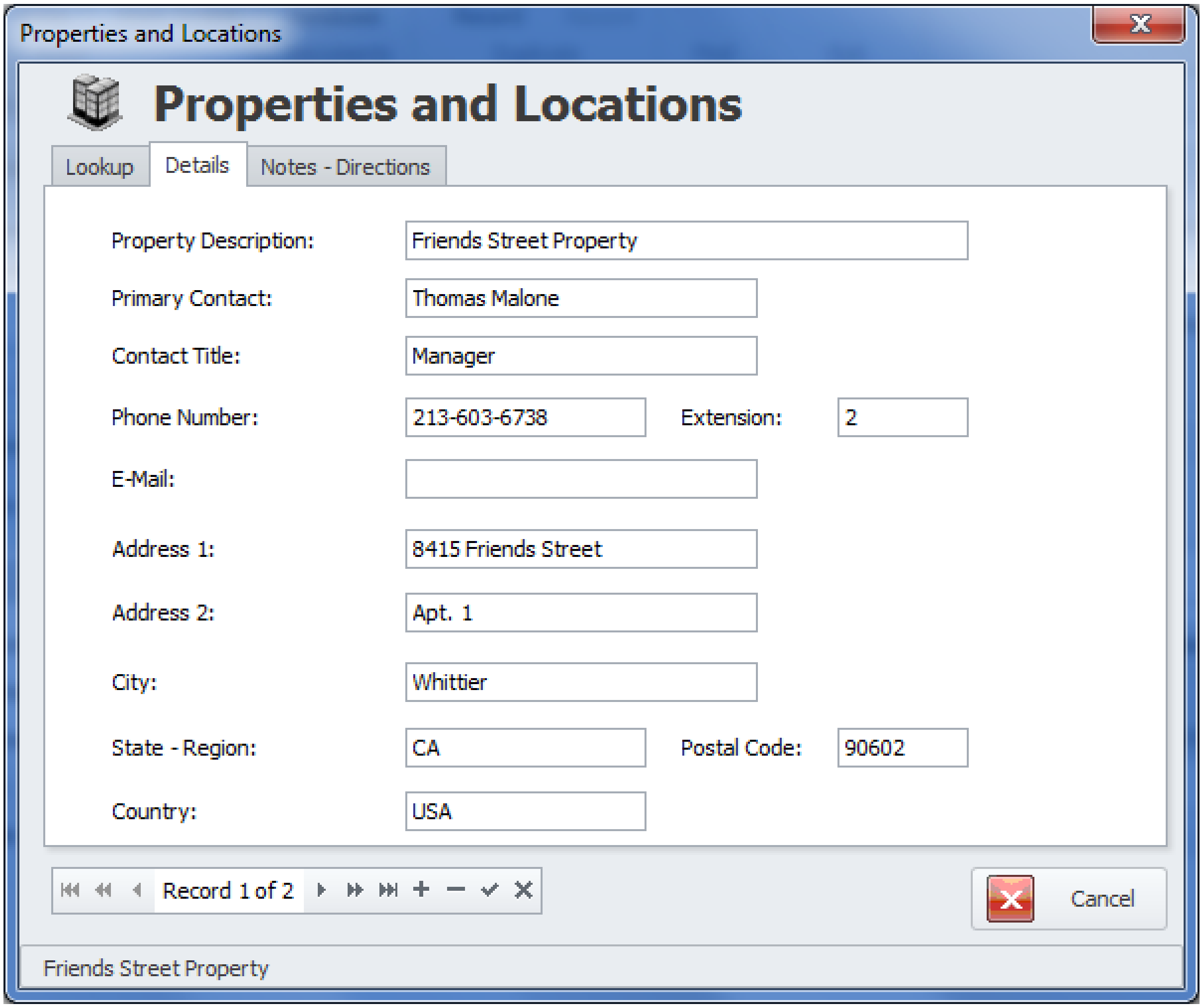
To access the Properties Database:

- From the ***Equipment and Assets*** module, click on the **File** menu.
- Select the **Properties Database** option.

Adding a new Property

To add a new property to the database:

- Move to the data control and click on the **Append (+)** button.



- Move to the **Details** tab and begin entering the appropriate information. The following fields are supported:
    - **Property Description** – This is an identifying description of the property. This field will accept up to 50 alpha/numeric characters.
    - **Primary Contact** – This is the name of the property's main contact. This field will accept up to 30 alpha/numeric characters.
    - **Contact Title** – This field indicates the contact's job or formal title. This field will accept up to 30 alpha/numeric characters.
    - **Phone Number** – This would be the contact's telephone number. This field will accept up to 30 alpha/numeric characters.
    - **Extension** – This is the extension for the above phone number. This field will accept up to 5 alpha/numeric characters.
    - **E-Mail** – This is the contact's email address. There is no limit to the size of this field.
    - **Address 1** – This would indicate the property's address. This field will accept up to 30 alpha/numeric characters.

  - **Address 2** – This would indicate the property's address. This field will accept up to 30 alpha/numeric characters.
  - **City** – This would indicate the city in which the property is located. This field will accept up to 30 alpha/numeric characters.
  - **State - Region** – This would indicate the state in which the property is located. This field will accept up to 30 alpha/numeric characters.
  - **Postal Code** – This would indicate the property's postal code. This field will accept up to 15 alpha/numeric characters.
  - **Country** - This would indicate the country in which the property is located. This field will accept up to 30 alpha/numeric characters.
- Move to the **Notes - Directions** tab and begin entering the appropriate information. The following fields are supported:
  - **Directions** – This would show the directions to the selected property. There is no limit to the size of this field.
  - **Notes** - This field is for recording any notes you want to include for the selected property. This is no limit to size of this field.
- Click on the **Post (check)** button to save your changes.

Deleting a Property

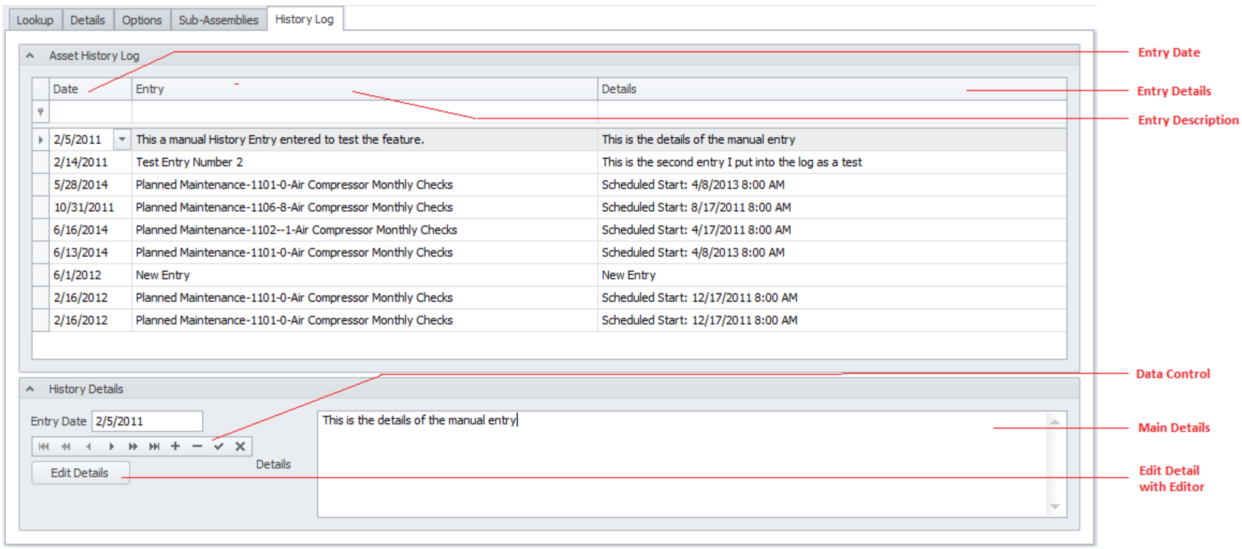
To delete a property from the database:

- Move to the **Lookup** tab of the ***Properties Database***.
- Move to the grid here and select the record you want to remove by clicking on it.
- Click on the **Delete (-)** button in the data control.
- When prompted about the deletion, click the **Yes** button.

History Log Tab

This tab holds the ***History Log*** database which allows you to maintain a complete history on your current asset. Use this log to record such items as completed PMs, repairs made, and other important information. Entries to this log can come from work orders, issues and can also be made manually. For entries from other modules, please refer to chapter covering those modules for details.

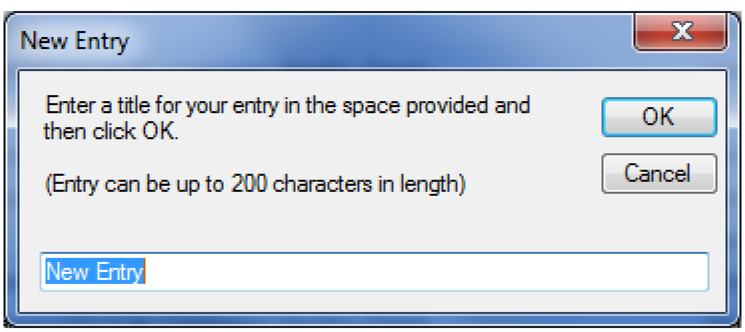
The following illustrates the elements found in this section:



Creating a Manual Log Entry

To manually create a new log entry:

- Select and make current the asset you want the entry to apply to.
- Move to the **History Log** tab, and locate the data control found there.
- Click on the **Append (+)** button in the data control.



- From the invoked **New Entry** dialog, move to the space provided and enter the information there. This field can contain up to 200 alpha/numeric characters.
- Click on the **OK** button.
- Click on the **Date** field in the grid showing the new entry.
- Click on the down arrow there to reset the applied date from the attached calendar.
- Move to the **Details** text box and edit your entry's details. You also click on the **Edit Details** button to edit the details with our built in text editor. There is not size limitation applied to this entry.
- Click on the **Post (checkmark)** button in the data control to save your changes.

Deleting a Log Entry

- Select and make current the asset you want the delete entry from.

- Move to the **History Log** tab, and locate and select the record you want to delete from within the grid.
- Move to the data control and click on the **Delete (-)** button.

- When prompted about the deletion, click the **Yes** button.

Add a New Asset Record

To add a new asset record:

- Move to the **Home** tab in the ribbon and click on the **Add New** option.
- Move through the various tabs and edit the new record.

Save Changes

To save changes to the main record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's ***Quick Access*** toolbar.

To save changes to the main record and all the underlying records (links, attachments, etc.), click on the **Save Changes** button found on the **Home** tab of the ribbon control.

Asset Print Options

To print the current asset:

- Locate and select the asset you want to print.
- Open the **File** menu and expand the **Asset Print Options** menu by clicking on it.
- Click on the Print Option of your choice:
    - **Print Record** - Allows printer selection and other options before printing.
    - **Quick Print** - Sends the document directly to the default printer
    - **Print Preview** - Provides a print preview of the current document

Sub-Assembly Print Options

To print the selected sub-assembly:

- Locate and select the sub-assembly you want to print.
- Open the **File** menu and expand the **Sub Assembly Print Options** menu by clicking on it.
- Click on the Print Option of your choice:
    - **Print Record** - Allows printer selection and other options before printing.
    - **Quick Print** - Sends the document directly to the default printer
    - **Print Preview** - Provides a print preview of the current document

Printing a Meters Collection Sheet

You can print a Meters **Collection Sheet** to help in the process of recording meter readings. In order for an asset to show up on this list, the **Use Meters** checkbox must be checked as found on the **Details** tab.

Meters Collection Sheet

Reference	Asset Description	Last Meter	New Meter
PSIH00001	600 PSI High Pressure Air Compressor	100.0	
MULT00001	Multi-Lane Palletizer	50.0	

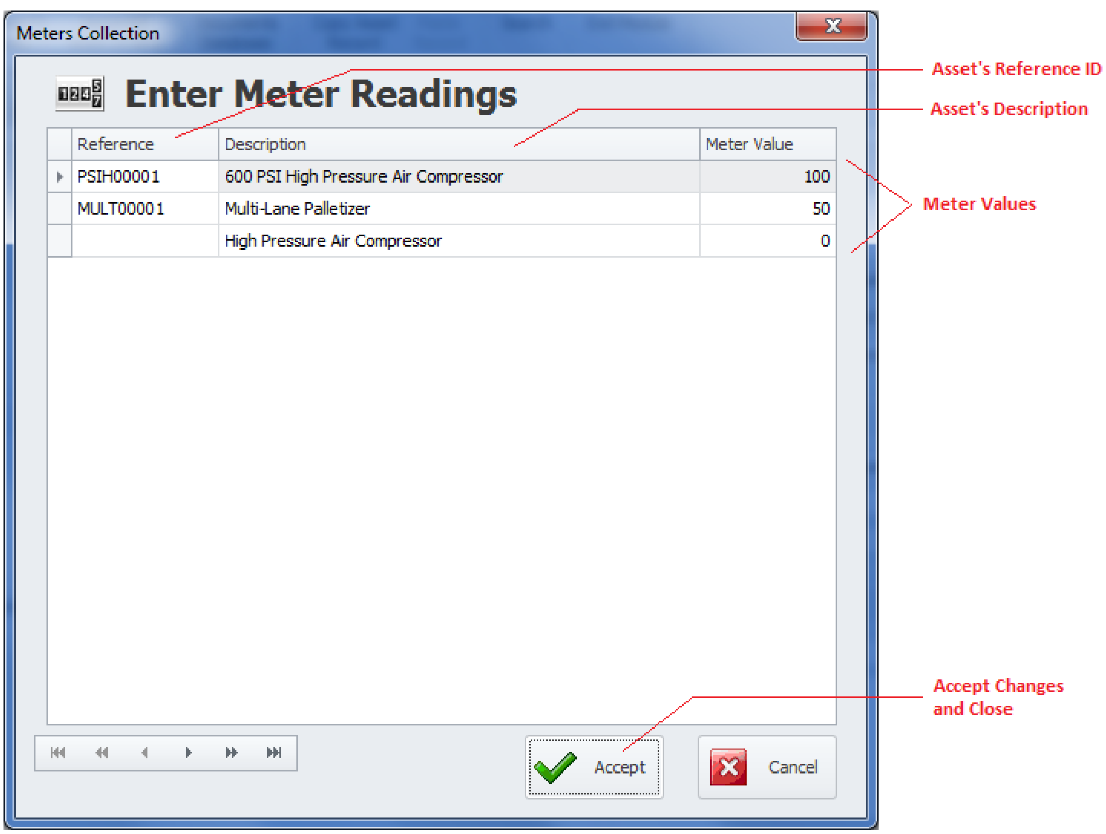
To print the Meters Collection sheet:

- Move to the **Home** tab in the ribbon and click on the **Collection Sheet** option.

Entering Meter Values

If you have the **Use Meter** checkbox checked on the **Details** view of an asset, then that asset will show up in a ***Meters Collection*** screen. This quick entry screen will allow you to enter updated meter readings in one easy to use dialog. This saves you from having to browse through all the records in the database to enter this information.

The following illustration shows the ***Meters Collection*** screen:



To enter Assets Meters:

- Move to the **Home** tab in the ribbon and click on the **Enter Meters** option.
- Move to the grid and select the record to edit the value on.
- Double mouse click within the **Meter Value** column from within the grid. This invokes the column's edit mode.
- Edit the value here and click **enter**.
- Repeat the editing process for each meter you want to update.
- Click on the **Accept** button to both close this screen and save any changes made.

Asset's Notes

You can keep detailed notes on each asset and sub-assemble in the database. These notes use our built in word processor that is used throughout the system. To find how to use the features of this word processor please refer to the ***Word Processor*** chapter.

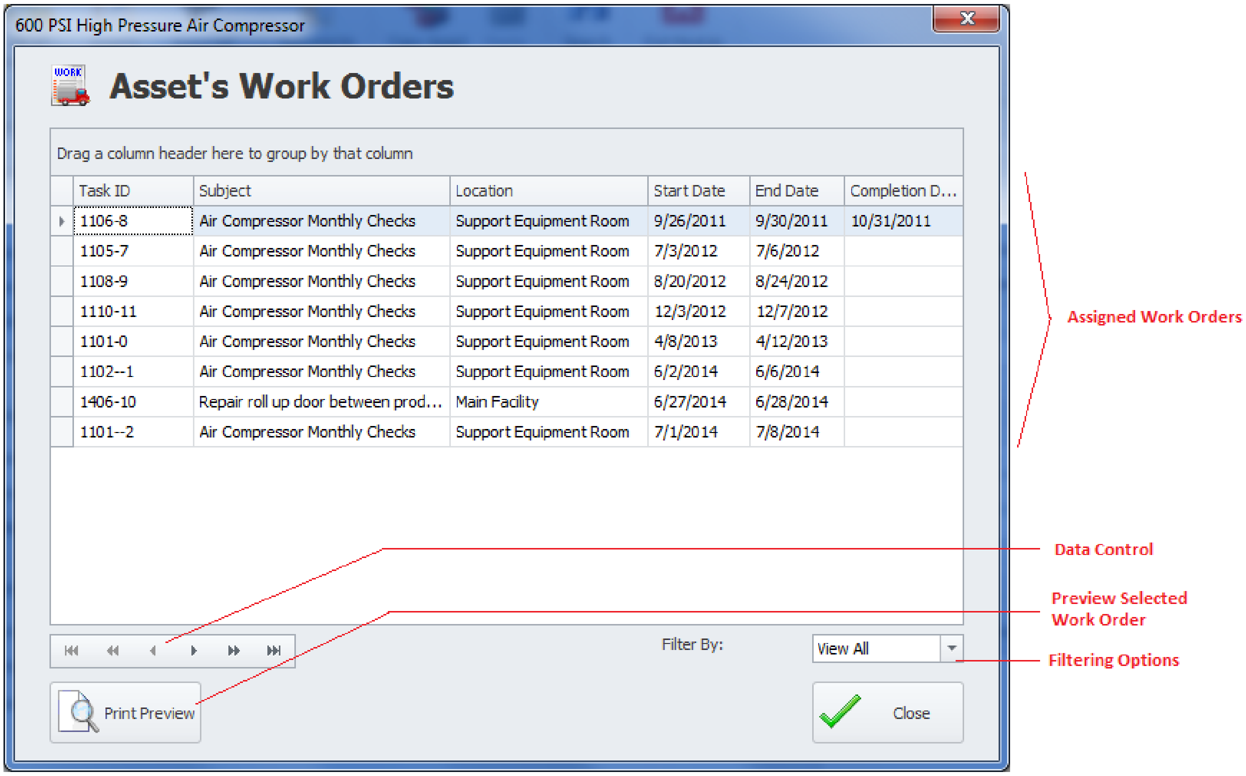
To access the Notes option:

- The Notes option is available to both assets and sub-assemblies. So the first step would be to select the appropriate record.
- With the record selected, move to the **Home** tab in the ribbon.
- Click on the **Asset's Notes** option to expand the drop down and then select the appropriate option available.
    - **Primary Asset Notes**
    - **Sub-Assembly Notes**

Assigned Work Orders

When the current asset is assigned as the **Primary Asset** of work orders, you can view work orders that are assigned to them. From the displayed work orders, these work orders can also be printed.

The following illustration shows the ***Assigned Work Orders*** screen:



To view Assigned Work Orders

- Select the asset you want to view work orders from.
- Move to the **Home** tab in the ribbon and click on the **Assigned Work Orders** option.

To Re-Filter the Work Orders

- Move to the **Filter By** drop down and select **All Open**, **Completed** or **View All**.

To see a Print Preview of a selected Work Order

- Move to the grid and select the work order you want to see a print preview on.
- Click on the **Print Preview** button.

Copy Asset Record

You can make a copy of the primary fields of a record, to be pasted into a different record. To make a copy of a record:

- Select the record that you want to copy.
- Move to the **Home** tab in the ribbon and click on the **Copy Asset Record** option.

Paste Record

To paste an asset record over an existing record:

- Copy the record as previously outlined.
- Select or create the record to paste into.
- Move to the **Home** tab in the ribbon and click on the **Paste Record** option.

Search

To perform a search on the Equipment and Assets database:

- Move to the **Home** tab in the ribbon.
- Click on the **Search** option.
- Refer to the ***Search*** section of the ***Common Features*** chapter for more information.

Main Report – Filter Wizard

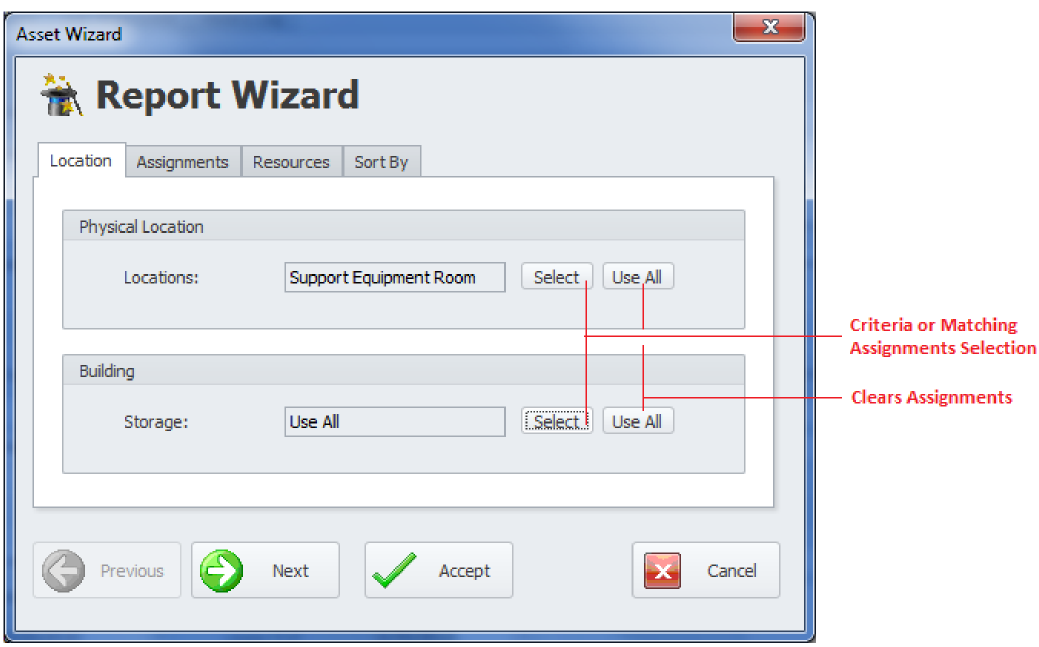
This Wizard is used for both the **Filter Wizard** and **Main Report Wizard** of the ***Equipment and Assets*** module. When used for either filtering or reporting purposes, the resulting items will be returned by the choices or criteria as setup with this wizard.

The following are some of the general elements of this wizard:

- **Previous** – This button move you backwards through the tabs.
- **Next –** This button move you forward through the tabs.
- **Accept** – Accepts the criteria as setup, and closes the wizard.
- **Cancel** – Backs out of the operation and closes the wizard.

Location Tab

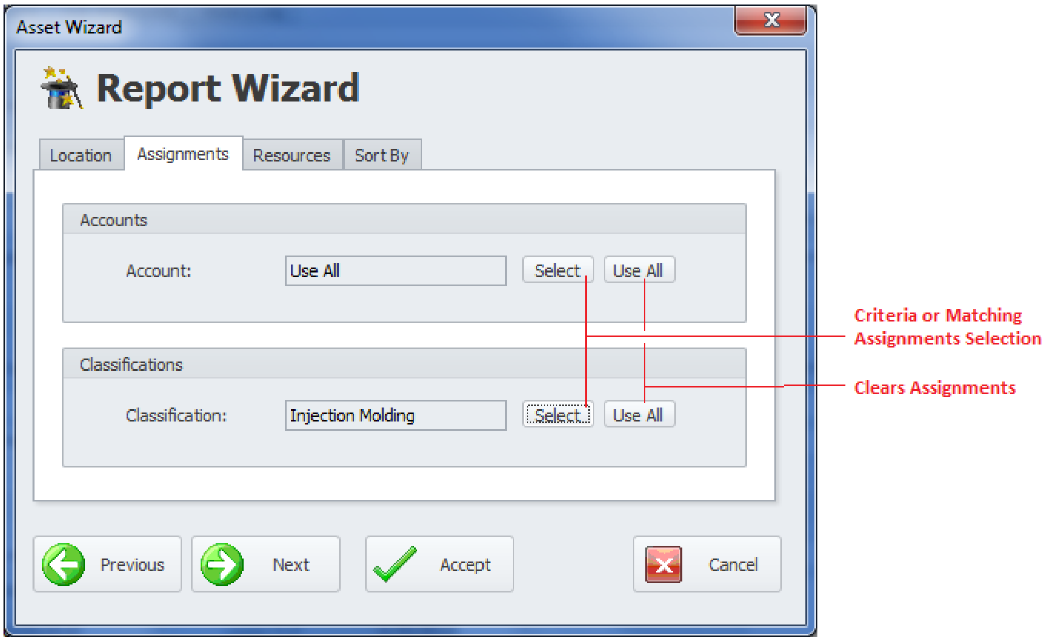
The following illustrates the elements found on this tab:



- **Location** – This criteria specifies the physical location of the asset. **Use All** returns all locations.
- **Building** - This criteria specifies the building the asset is stored in. **Use All** returns all buildings.

Assignments Tab

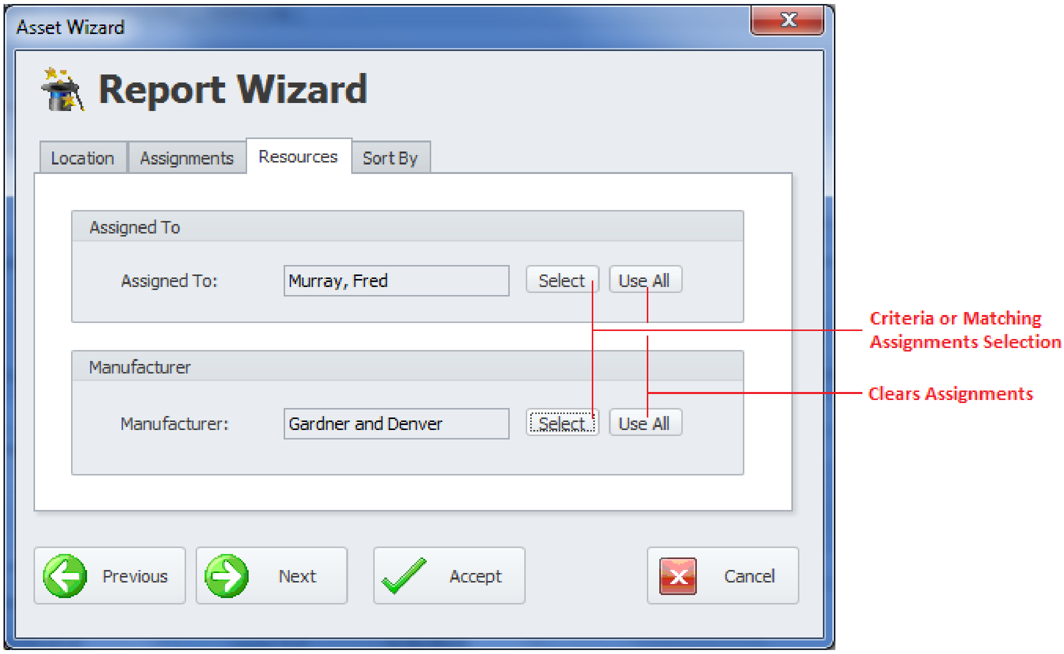
The following illustrates the elements found on this tab:



- **Account** – This criteria specifies the account to use. **Use All** ignores this criteria.
- **Classification** – This criteria specifies the Classification to use. **Use All** ignores this criteria.

Resources Tab

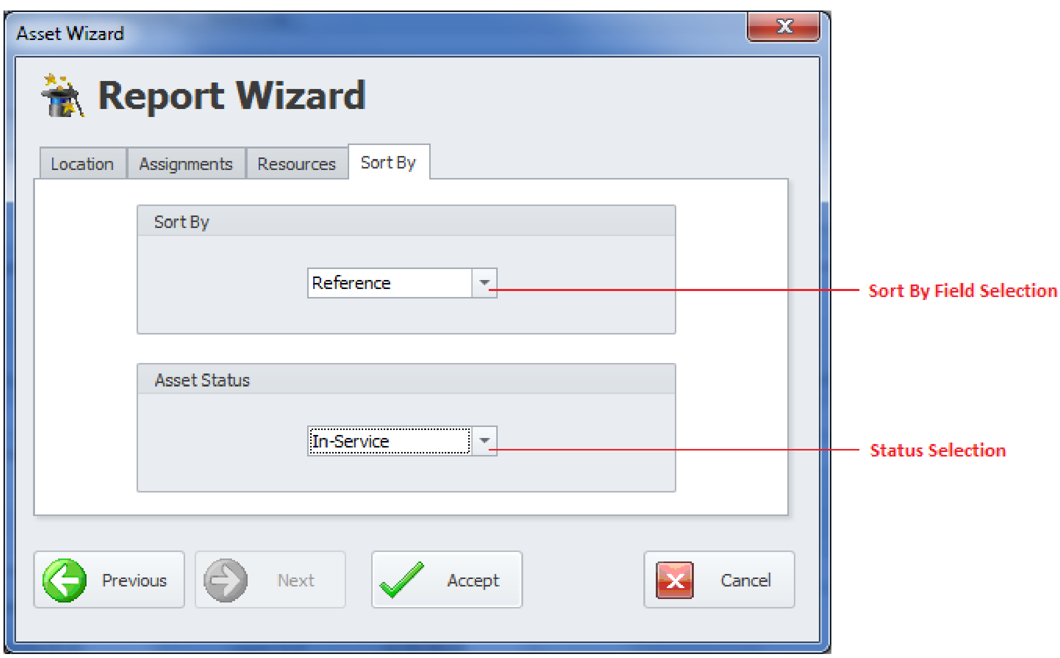
The following illustrates the elements found on this tab:



- **Assigned To** – This criteria specifies the Employee Assignment to use. **Use All** ignores this criteria.
- **Manufacturer** – This criteria specifies the Manufacturer to use. **Use All** ignores this criteria.

Sort by Tab

The following illustrates the elements found on this tab:



- **Sort By** – This selection specifies the field to sort by.
- **Asset Status** – This criteria specifies the status setting to use.

Filtering Options

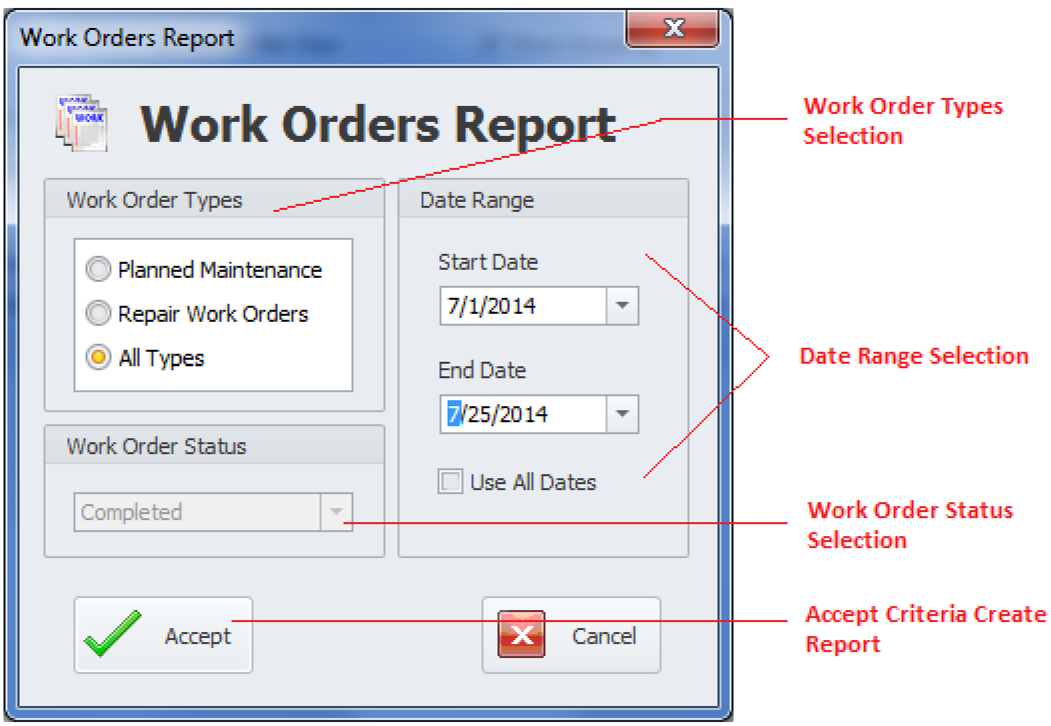
On the **Filtering** tab of the ribbon control, you'll find the following filtering options:

- **Default Filter** – Filters the database to show all records.
- **Filter Wizard** – Use the criteria of the **Main Report – Filter Wizard** to filter the database by.
- **Uses Meters** – This filters the database by all records that have the **Use Meters** value checked.
- **Selected Records** - This filters the database by all records that have the **Selected** value checked.

Work Orders Report Wizard

The **Work Orders Report** wizard is used in the creation of the **Assigned Work Orders** report and the **Predictive Maintenance** Report.

The following illustrates this wizard:

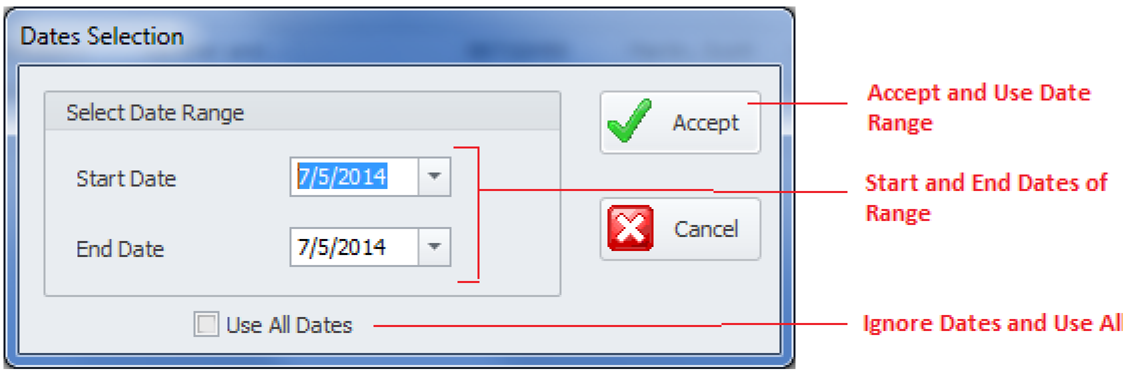


- **Work Order Types** – Make this selection by clicking on one of the available options here.
  - **Planned Maintenance** – Reports on recurring work order types.
  - **Repair Work Orders** – Reports on one-time work order types.
  - **All Types** – Reports on all available work types.
- **Work Order Status** – When available, returns only those record with the selected status.
  - **Completed** – Returns records with a status of completed.
  - **Open** – Returns all records that have not been marked as completed.
  - **View All** – Ignores the work order status indicators.
- **Date Range** – Returns work orders that fall within the provided date range.

  - **Start Date** – This is the scheduled start date of the provided date range.
  - **End Date** – This is the scheduled end date of the provided date range.
  - **Use All Dates** – Ignores dates and returns all.
- **Accept** – Accepts and applies the criteria as setup.

Date Selection Dialog

Some of the available reports are based on a date range. The following illustrates the **Dates Selection Dialog**:



- **Start Date** – This is the start date of the provided date range.
- **End Date** – This is the end date of the provided date range.
- **Use All Dates** – Ignores dates and returns all.

Report Wizard Report (Asset Report)

This report uses the ***Main Report – Filter Wizard*** for the creation of this report, and the records returned by the report. This is basically an Assets List report.

Asset Report

Reference Location	Description Manufacturer	Asset No	Model No	Serial No	Acquired Amount	Appraised Amount	In Service
	High Pressure Air Compressor						Yes
PSIH00001 Support Equipment Room	600 PSI High Pressure Air Compressor Gardner and Denver			8871GH99	12,598.00	10,078.40	Yes

To create the Main Asset Reports:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Report Wizard** option.
- Follow the instructions as outlined in the ***Main Report – Filter Wizard*** section.

Assigned Work Orders Report

This reports uses the ***Work Orders Report Wizard*** in the creation of the report and is based on the currently selected asset only. This report returns a basic list of assigned work orders.

Asset Work Orders
600 PSI High Pressure Air Compressor

Description:	600 PSI High Pressure Air Compressor	Reference:	PSIH00001
Manufacturer:	Gardner and Denver	Serial No:	8871GH99
Model No:		Asset No:	

Task ID Meter	Dates	Subject	Parts Usage	Mechanics
1101-0 200.0	Start: 4/8/2013 End: 4/12/2013 Done:	Air Compressor Monthly Checks (Planned Maintenance)	[SAFE00001] Safety Goggles, Qty Used: 2.00 [DRUM00001] 800T-77990 - Drum Switch, Qty Used: 1.00	Martin, Scott, Hours Used:
1106-8	Start: 9/26/2011 End: 9/30/2011 Done: 10/31/2011	Air Compressor Monthly Checks (Planned Maintenance)		

To create the Assigned Work Orders Report:

- Select and make current the asset record you want create the report on.
- Move to and click in the **Reports** tab in the ribbon.
- Click on the **Assigned Work Orders** option.
- Follow the instructions as outlined in the ***Work Orders Report Wizard*** section.

History Log Report

To print a copy of the History Log:

Maintenance History Log

Description:	600 PSI High Pressure Air Compressor	Reference:	PSIH00001
Manufacturer:	Gardner and Denver	Serial No:	8871GH99
Model No:		Asset No:	

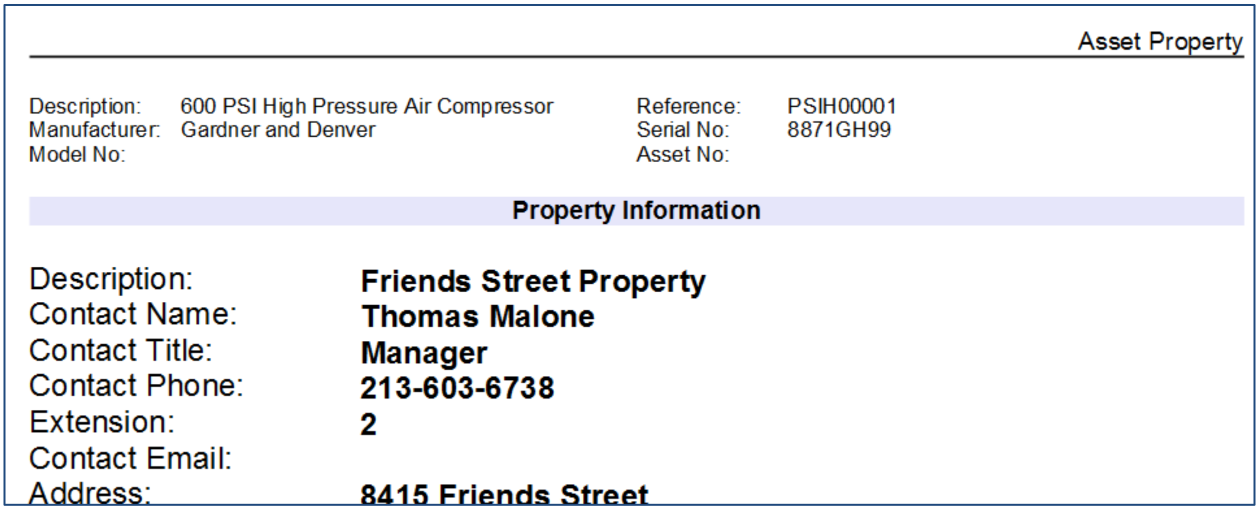
Entry Date:	10/31/2011
Entry Title:	Planned Maintenance-1106-8-Air Compressor Monthly Checks
Entry Details:	Scheduled Start: 8/17/2011 8:00 AM Scheduled End: 8/28/2011 5:00 PM Completion Date: 10/31/2011 Completion Comments and Delays: PM was perfmed as requested

Entry Date:	2/16/2012
Entry Title:	Planned Maintenance-1101-0-Air Compressor Monthly Checks
Entry Details:	Scheduled Start: 12/17/2011 8:00 AM Scheduled End: 12/20/2011 5:00 PM Completion Date: PARTS USEAGE: Qty Used: 2.00 [SAFE00001] Safety Goggles

- Select and make current the asset record you want create the report on.
- Move to and click in the **Reports** tab in the ribbon.
- Click on the **History Log** option.
- Follow the instructions as outlined in the ***Date Selection Dialog*** section.

Property Information Report

To print information of the assigned property:



Asset Property

Description: 600 PSI High Pressure Air Compressor
Manufacturer: Gardner and Denver
Model No:
Reference: PSIH00001
Serial No: 8871GH99
Asset No:

Property Information

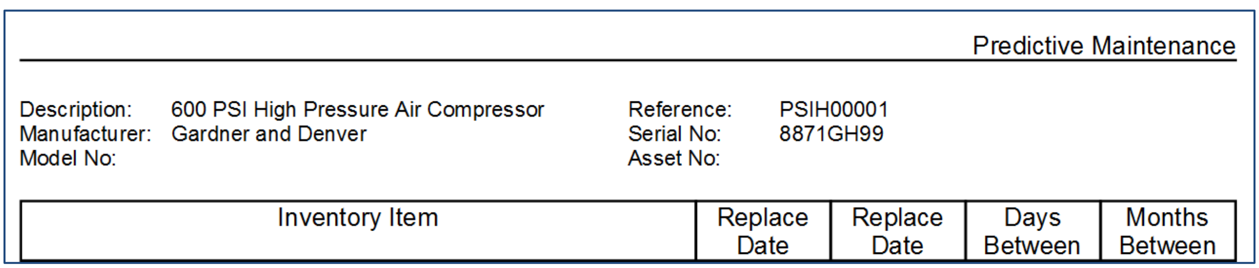
Description:	**Friends Street Property**
Contact Name:	**Thomas Malone**
Contact Title:	**Manager**
Contact Phone:	**213-603-6738**
Extension:	**2**
Contact Email:	
Address:	**8415 Friends Street**

- Select and make current the asset record you want create the report on.
- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Property Info** option.

Predictive Maintenance Report

This report will report on the dates between a part's repeated replacements. It calculates both the days and months between these replacements. With this information the user can predict when a part may fail again.

To create a **Predictive Maintenance Report**:



Predictive Maintenance

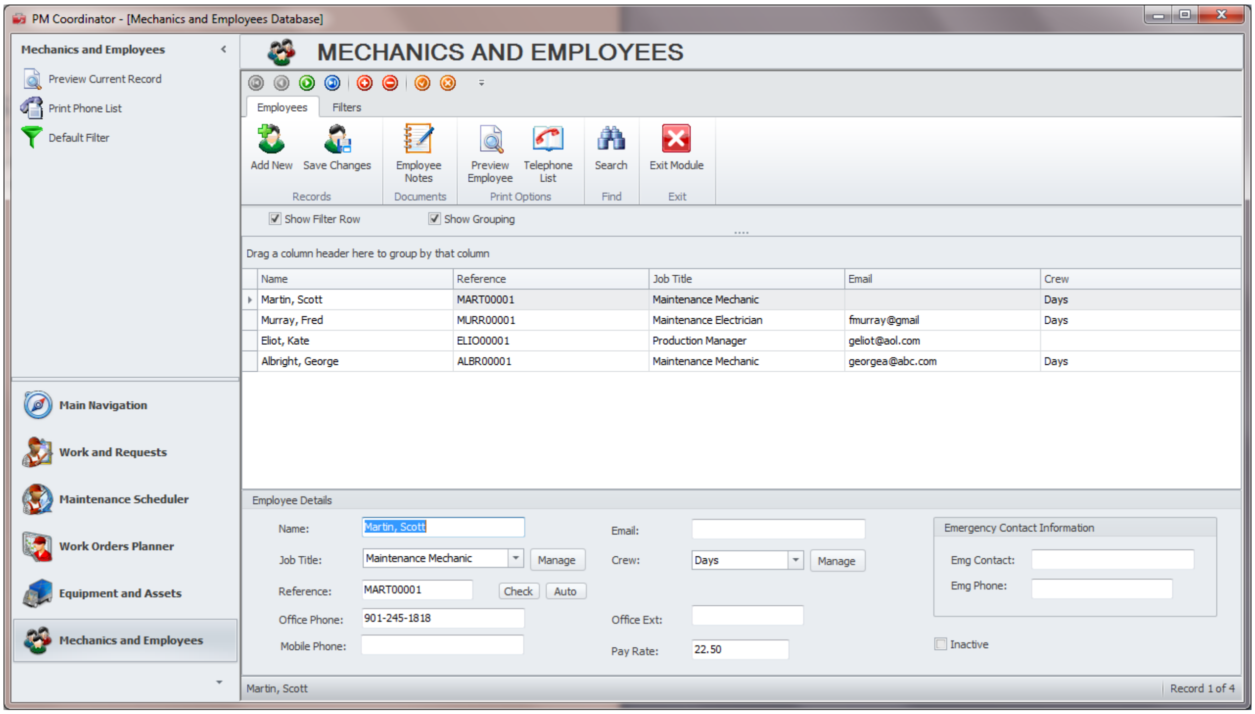
Description: 600 PSI High Pressure Air Compressor
Manufacturer: Gardner and Denver
Model No:
Reference: PSIH00001
Serial No: 8871GH99
Asset No:

Inventory Item	Replace Date	Replace Date	Days Between	Months Between

- Select and make current the asset record you want create the report on.
- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Predictive Maintenance** option.
- Follow the instructions as outlined in the ***Work Orders Report Wizard*** section.

Mechanics and Employees Database

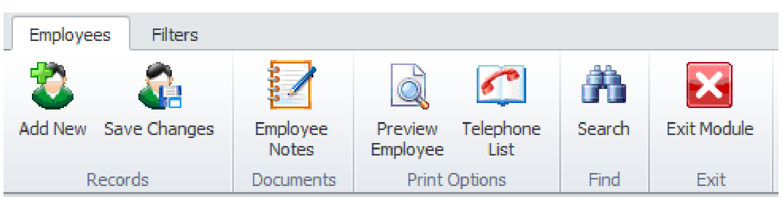
The information from the Mechanics and Employees Database is used throughout the system as it relates to the entry fields that require an employee assignment.



Ribbon Control

The basic functionality of the ***Mechanics and Employees*** module is provided via a set of Ribbon tabbed pages. Ribbon pages are structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

EMPLOYEES TAB

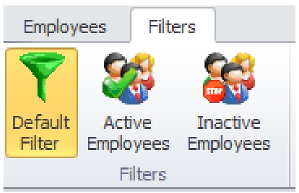


The following are the elements on the **Home** ribbon tab, reading left to right:

- **Add New** – Creates a new blank record in the database.
- **Save Changes** – Saves all current changes from all elements of a record (master save).
- **Individual Notes –** Allows the viewing and editing of the notes assigned to the current record.
- **Preview** – Provides a Print Preview of the selected record.

- **Telephone List** – Create a telephone list report.
- **Search -** Invokes the search/find routine on the Lookup Grid.
- **Exit Module** - Close and exits the module.

FILTERS TAB



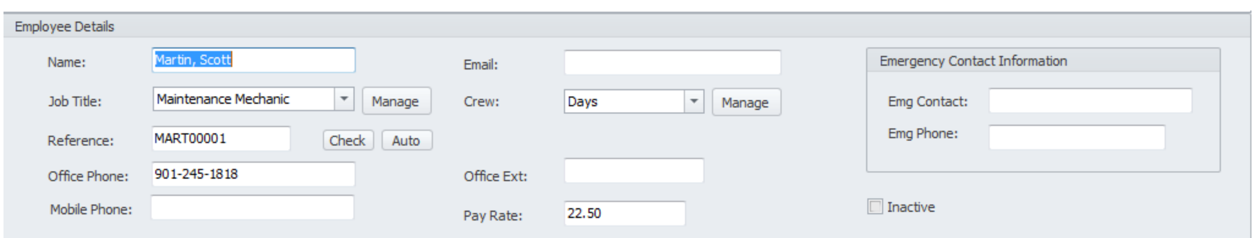
The following are the elements on the **Filters** ribbon tab, reading left to right:

- **Default Filter** – Shows every record in the database.
- **Active Employees** – Shows every record in the database that has not been marked as Inactive.
- **Inactive Employees** – Shows every record in the database that has been marked as inactive.

Employee Details

This section allows you to specify general information about the current associate. This information is found in the **General Information** group, location within the **Details** tab.

The following illustrates the elements found in this section:



Full Name

This alpha/numeric field will accept up to 40 characters and represents the employee's full name. For lookup purposes it is recommended that you use the format: last name, first name.

E-Mail

This alpha/numeric field has no size limitations and represents the associate's email address.

Job Title

This alpha/numeric field will accept up to 30 characters and represents the associate's assigned job.

Shift/Crew

This alpha/numeric field will accept up to 30 characters and represents the associate's assigned shift or crew

Reference ID

This field should be unique in your database, but it's not an enforced rule. It is used to help identify your associate. Edit this field by typing in the space provided. This field can accept up to 30 alpha/numeric characters.

Once the **Full Name** field has been entered you can click on the **Auto Reference** button to have the application create the **Reference** field for you.

To insure the **Reference** is unique in the database, click on the **Check Reference** button.

Telephone Numbers

The information stored in this area represents the phone numbers related with the selected associate. Each of these alpha/numeric fields can contain up to 15 characters each with the exception of the **Extension** field. The **Extension** field is limited to 5 characters.

The following illustrates the elements found in this section:

Hourly Rate

This floating point field is used to record an associate's hourly pay rate. This information is used with work order labor calculations.

Emergency Contact Information

This section allows you to record contact information to be used in the case of an emergency.

Emergency Contact Name

This alpha/numeric field can contain up to 40 characters and is used to record the name of the associate's emergency contact.

Emergency Contact Telephone Number

This alpha/numeric field can contain up to 15 characters and is used to record the telephone number to use when contacting the emergency contact.

Add a Record

To add a new employee record:

- Move to the **Home** tab in the ribbon and click on the **Add New** option.
- Move through the various tabs and edit the new record.

Save Changes

To save changes to the main record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's ***Quick Access*** toolbar.

To save changes to the main record and all the underlying records (links, attachments, etc.), click on the **Save Changes** button found on the **Home** tab of the ribbon control.

Individual Notes

You can keep detailed notes on each associate record in the database. These notes use our built in word processor that is used throughout the system. To find how to use the features of this word processor please refer to the ***Word Processor*** chapter.

To access the Individual Notes option:

- With the record selected, move to the **Employees** tab in the ribbon.
- Click on the **Employee Notes** button.

Telephone List Report

This report provides a Telephone List including all employees.

Employees Telephone List

Albright, George	(901) 245-1473
Eliot, Kate	700-244-0473
Martin, Scott	901-245-1818

To create the Telephone List Report:

- Move to the **Employees** tab in the ribbon and click on the **Telephone List** option.