



MAINTENANCE COORDINATOR

VERSION 8.x NET USERS GUIDE

STANDARD EDITION FEATURES

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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. These rights are setup with user accounts; please refer to the Security, Databases and Utility Modules chapter for more information on this subject.

Please note that if password protection has not been turned on, all users effectively have Administrator rights.

Installing the Application

Maintenance 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.

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

To install Maintenance 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

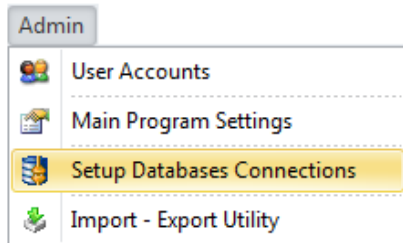
By default, the databases used by the **Maintenance Coordinator** system are installed to the **Documents\Maintenance Coordinator** folder. It is highly recommended that you leave a set of these databases in this location. However, there are occasions when you want them to reside in other locations, 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.

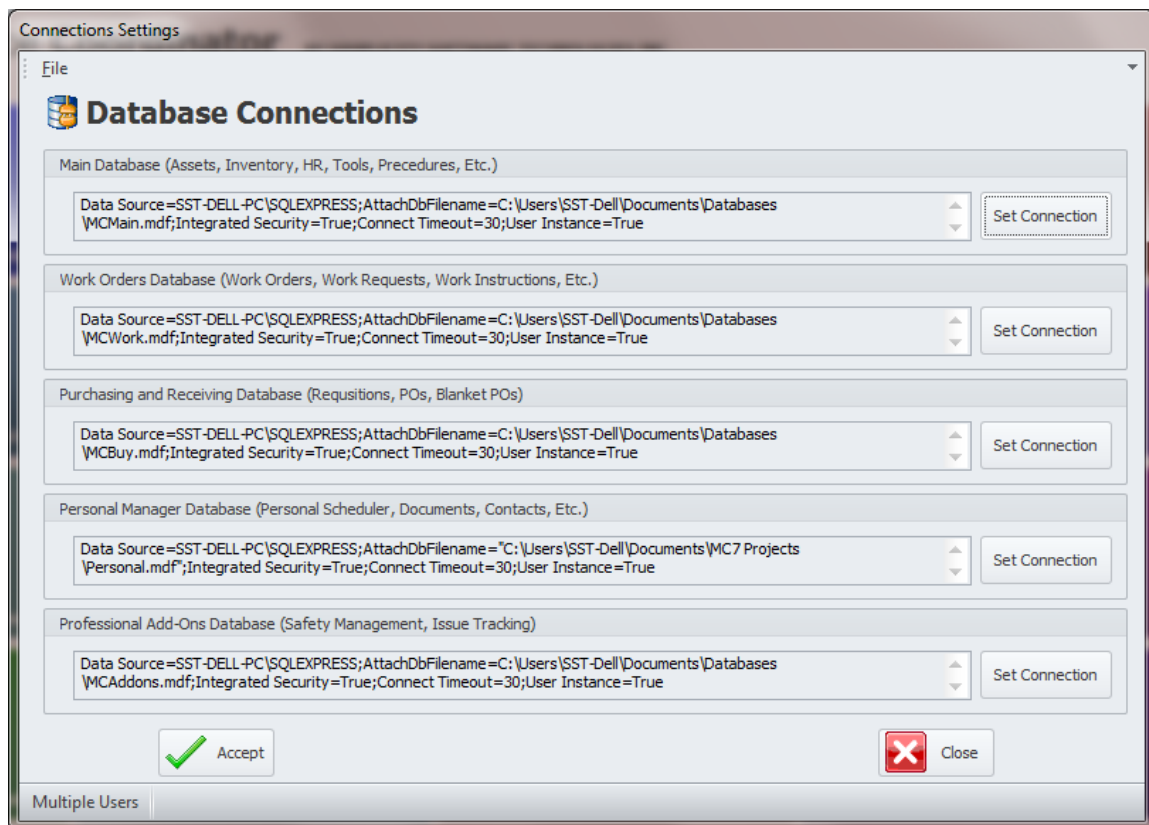
To setup your database connections:

- Log in to the program as a user with administrator rights.

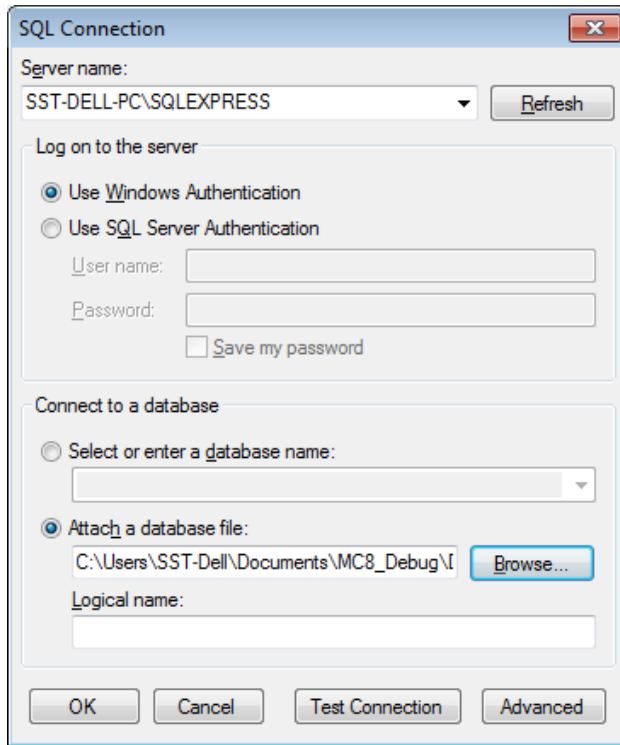
- From the main start menu, open the **Admin** drop down menu and select the **Setup Database Connections** option.



- From the invoked **Connections 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 **Server 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.

Brief Description of the Databases

- **Main Database** - This database holds the main information or tables dealing with **Maintenance 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.
- **Purchasing and Receiving Database** – This database maintain information for Purchasing and Receiving support, purchase orders, purchase requisitions and blanket purchase orders.
- **Personal Manager Database** – This database maintains information on personal items. Personal Log, Personal Scheduler, Personal Contacts and Journal information.
- **Professional Add-Ons Database** – This database supports some of the add-on features and their data storage. Currently supported are Issues and Safety Management 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 **Maintenance Coordinator** option to start the program.
- OR
- Click the **Maintenance 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:

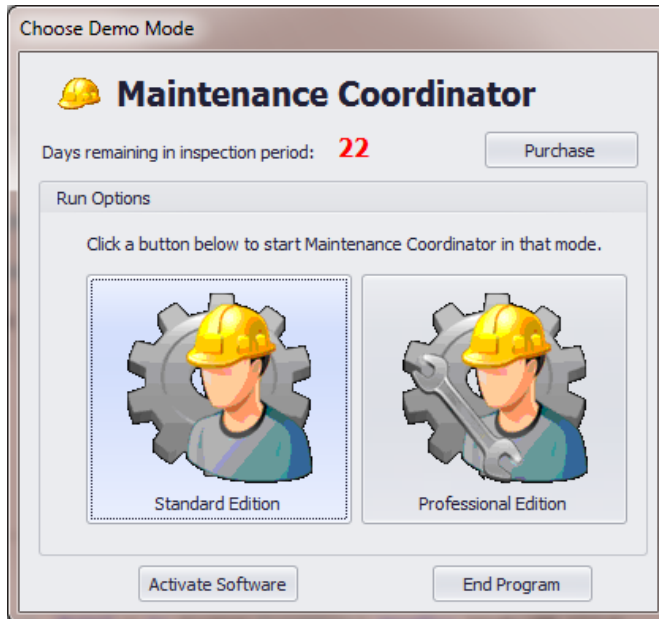
To activate the application from an email message (Outlook example):

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/Maintenance 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 **Choose 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.

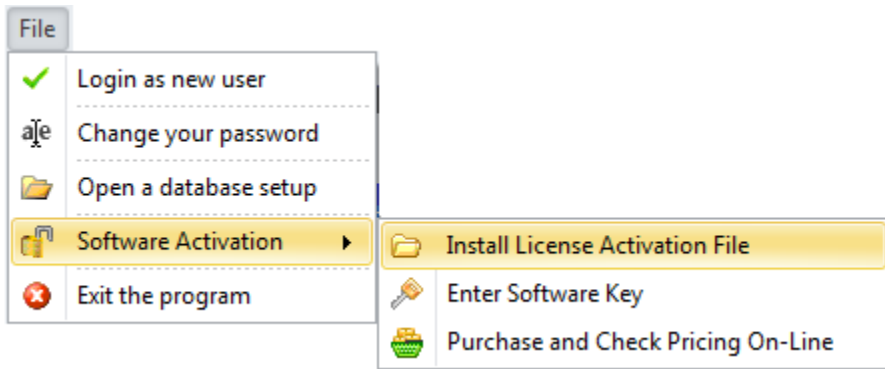
Validating from within the Application

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 Maintenance 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 than who it is 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.

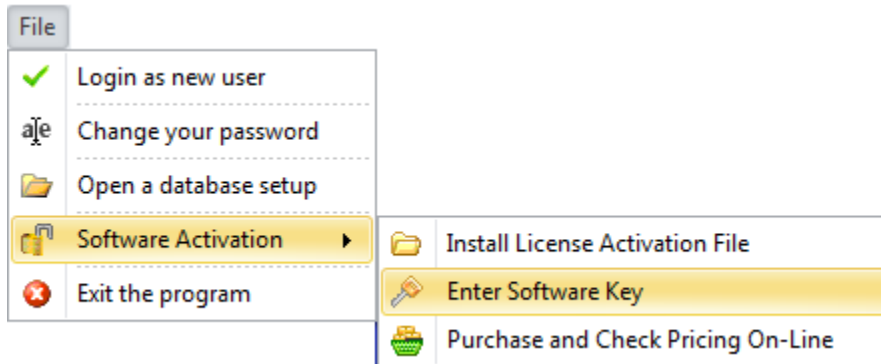
Entering a Software Key

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.

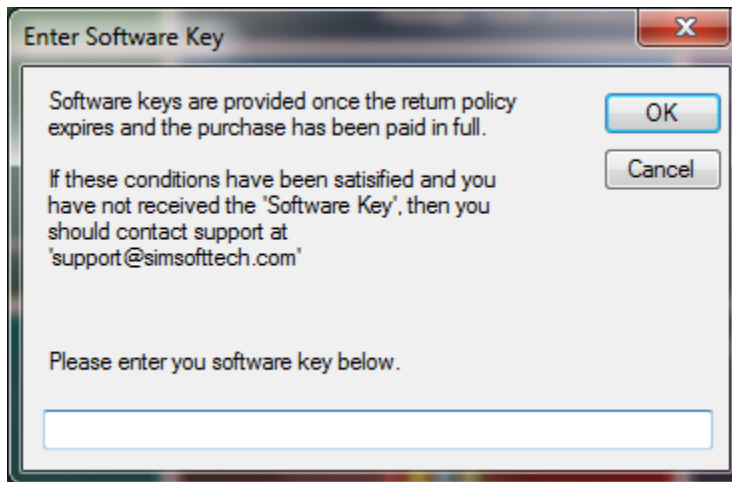
Also note that we normally use first class mail to deliver these software keys to you, so please be on the lookout for this letter.

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

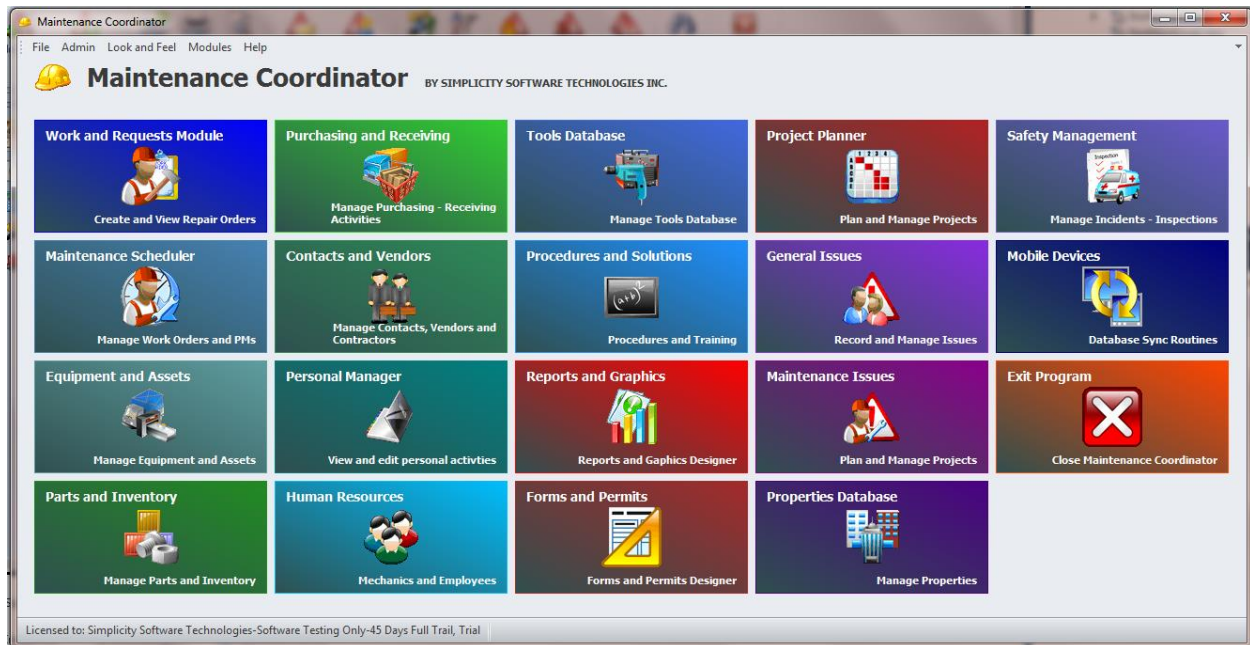
Software keys are our way of extending credit to our customers. When the software is waiting for a software key to be issued, it operates without limitation for a period of not less than 45 days. Most, if not all our software offerings carry a 30-days money back guarantee, and also have a net due with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

IMPORTANT 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.

The following illustration is from the **Professional Edition**; your menu may be different depending on user rights and purchased modules.



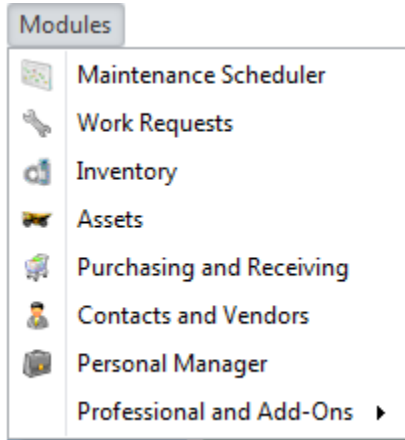
To navigate between program modules:

Option One

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

Option Two

- From the main menu open the **Modules** menu and select the module of your choice.

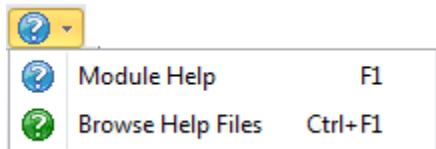


- If you purchased the **Professional Edition** or added modules, expanding the **Professional and Add-Ons** menu will provide you with more options.

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.

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.

Main Application Settings

Main Settings

Company Information | Auto Email Settings | New Email Notices | Other Settings

Company Information

Company Name: Simplicity Software Technologies

Address: 3760 Vine Maple Road

Address:

City: San Bernardino

State or Region: CA

Postal Code: 92407

Telephone No: 909-275-3542

Fax No: 909-275-3512

Web-Site (URL): www.simplicity-inc.com

Company Logo

Right Mouse Click for Options

OK Cancel

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.

Auto Email Settings

You have a few setup options with the **Auto Work Orders Email** feature. The automatic emailing of work order is performed from within the **Main Menu** module, and the program checks for new documents approximately every 5 minutes. As new items are found, the application will email responsible people copies of actual work orders.

The screenshot shows the 'Main Application Settings' window with the 'Auto Email Settings' tab selected. Inside this tab, there is a sub-dialog titled 'Auto Email Setup Options (Work Orders)'. This sub-dialog contains the following settings:

- Export File Format:** A dropdown menu set to 'Acobat PDF (*.pdf)'.
- Work Order Types:** A dropdown menu set to 'Recurring Types (PMs)'.
- Who to Email:** A dropdown menu set to 'All 3 Resources'.
- Days in Advance:** A numeric input field set to '3'.
- Allow sending emails from this computer:** A checked checkbox.
- Allow printing from this computer:** A checked checkbox.
- Send Now:** A button to trigger an immediate email.

At the bottom of the main settings window are 'OK' and 'Cancel' buttons.

The following are the elements found on this tab:

- **Export File Format** – This setting tells the program what file format to use when emailing work orders. It also specifies what action to take. The following are the options of the drop down.
 - **Acrobat PDF** – This option emails copies of work order in the PDF format.
 - **Rich Text Format RTF** – This options emails copies of work orders in the RTF format. These types of documents can be opened and edited in many word processors.
 - **Auto Print Only** – This option prints work orders directly to the default printer.
 - **Mail PDF and Print** – This option both email PDF documents and prints them to the default printer.
 - **Mail RTF and Print** – This option both email RTF documents and prints them to the default printer.
- **Work Order Types** – This options tells what type of work orders to process. The options here are:
 - **Recurring Types (PMS)**
 - **Standard Work Orders**
 - **All Work Order Types**
- **Who to Email** – This option allows you to specify which resource assignments to send email to. Options here include:
 - **Resource Assignment 1**
 - **Resource Assignments 1 and 2**
 - **All 3 Resources**
Besides the email options setup here, the program can optionally email the other recipients as specified in the **Maintenance Scheduler** module.
 - **Days in Advance** – This setting specifies how many days in advance, as it relates to scheduled start dates, to send or print the work orders.
- **Allow sending emails from this computer** – Checking this option allows sending emails from this computer.
- **Allow printing from this computer** – Checking this option allows the printing of work orders from this computer.

Note that once the work orders are send or printed from any computer, the Send flag is set preventing the process from repeating

New Email Notices

When various items are created and entered into **Maintenance Coordinator**, you can have the application send notices to the recipients of your choice about these new items.

Supported are notices for the entry of the following items:

- **New Work Requests Notices** – These notices will be sent when new work requests are entered in to the systems either manually, or through the use of the (optional) **Remote Service Requests** module.

- **New Purchase Requisition Notices** – These notices are sent when new Purchase Requisitions are found in the system.
- **New Open Issue Notices** – These notices are sent when new issues are found in the system, these issues have a status of Needs Attention, or Urgent issue, and they were created in either of the two issues modules. The Issues tracking feature is part of the **Maintenance Coordinator – Professional Edition**, or as an add-on to the **Standard Edition**.

The screenshot shows the 'Main Application Settings' dialog box with the 'New Email Notices' tab selected. The dialog contains three sections for configuring email notifications:

- New Work Requests Notices:** The 'Allow Notices' checkbox is checked. The 'Email Notice To' field contains 'mdunbar@simsofttech.com' and a 'Select' button is to its right.
- New Purchase Requisition Notices:** The 'Allow Notices' checkbox is checked. The 'Email Notice To' field contains 'info@simsofttech.com' and a 'Select' button is to its right.
- New Open Issues Notices:** The 'Allow Notices' checkbox is checked. The 'Email Notice To' field contains 'sales@simsofttech.com' and a 'Select' button is to its right.

At the bottom of the dialog are two buttons: 'OK' (with a green checkmark icon) and 'Cancel' (with a red X icon).

To setup who receives email notices about new document creation:

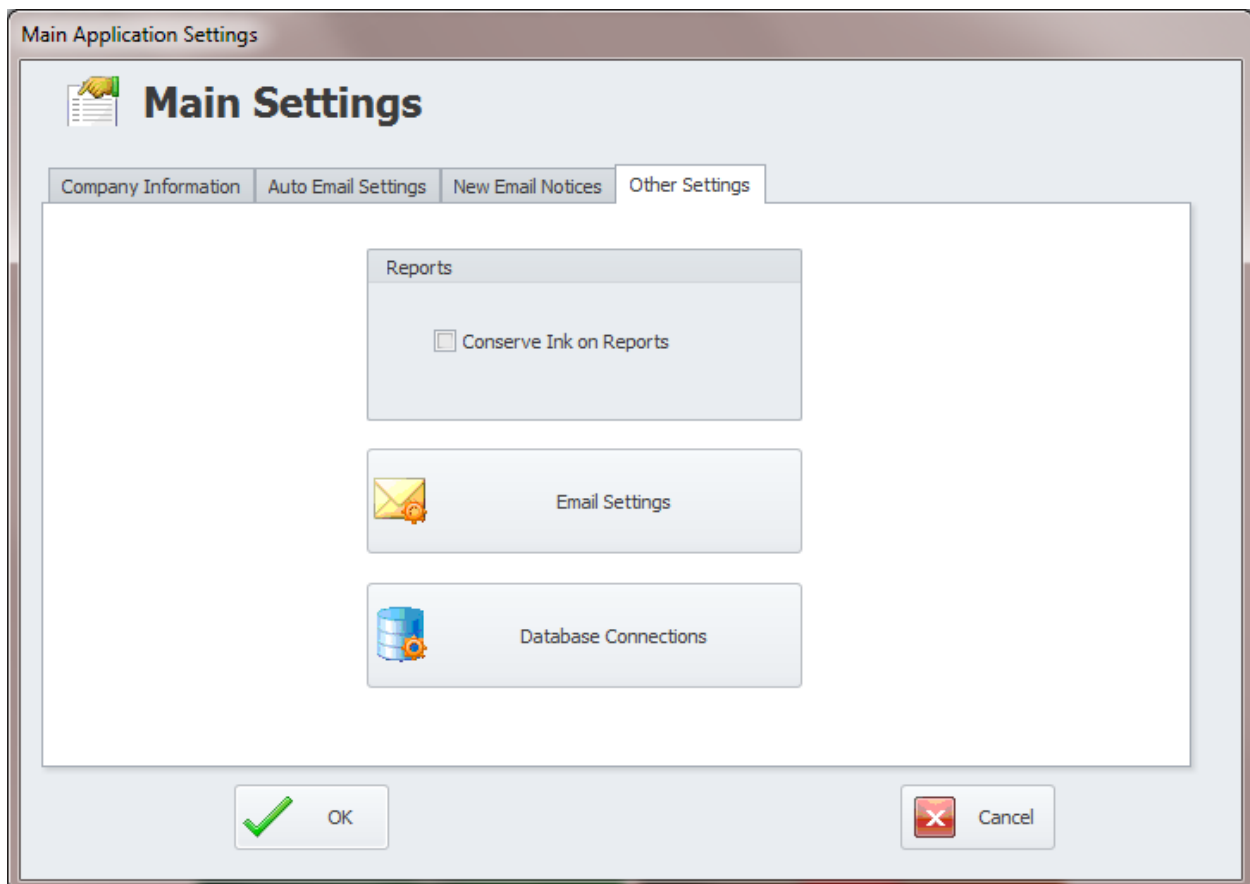
- Move to the group you want to setup the recipient(s) on.
- Check the **Allow Notices** check box.
- Move to and click on the **Select** button.
- From the invoked **Mail Recipients** dialog, select and add the recipient or recipients you want to send email notices to.
- Click on the **Select** button.
- Repeat for each available group on this tab.

The system will be checked in the same time frame as the **Auto Email Feature**. Also note that multiple recipients are separated by a semi-colon (;), and you can type in these recipients in place of selecting them from the **Mail Recipients** lookup.

Other Settings

On the **Other Settings** tab of the **Main Application Settings** dialog, you have the following options:

- **Conserve Ink on Reports** – When checked, the application will try to remove some of the ink usage on some of the built in reports
- **Email Settings** – This allows you to setup the internal email feature for use with the built in **Email Composer**, and for the auto email features. This will be outlined in the next section.



- **Database Connections** – This allows you to setup your database connections as outlined earlier in this chapter.

Email Settings

If you plan on using any of the built-in email features, then you will need to setup your internal email settings. The email component we used supports non-secured email connection, SSL connections and TLS connections. These settings allow use with a variety of mail servers, including, but not limited to free Gmail accounts.

To access **Email Settings** from the **Main Menu**:

- 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.
- Move to the **Other Settings** tab and click on the **Email Setting** button.

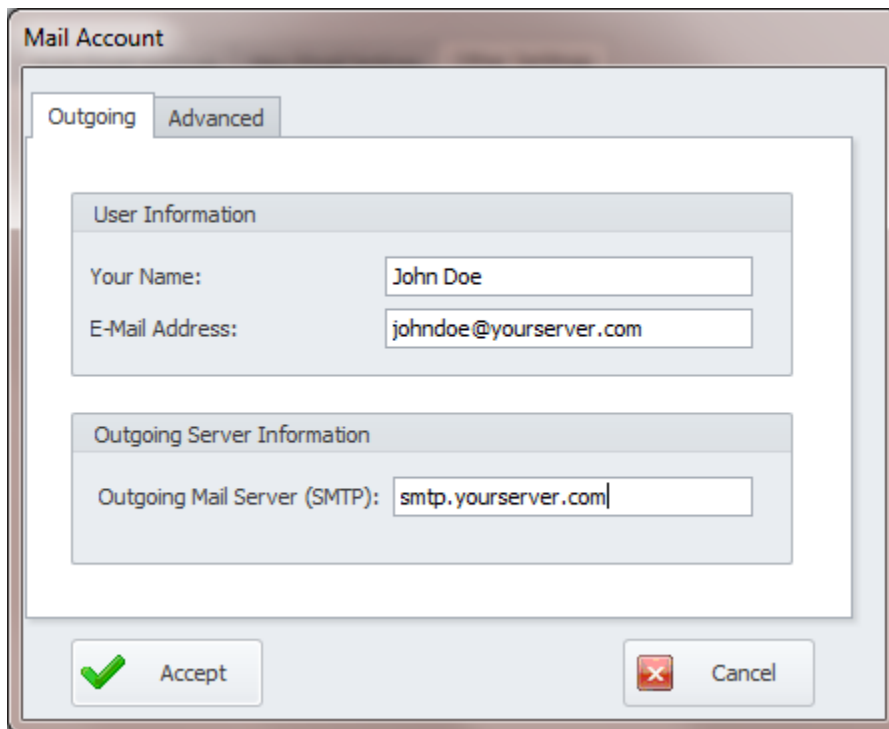
To access Email Settings from the **Email Composer**:

- Open the **File** menu.
- Click the **Email Settings** option.

Outgoing Settings

This tab allows you to setup user information and name of your Outgoing Mail Server.

The following image illustrates the elements of this tab:

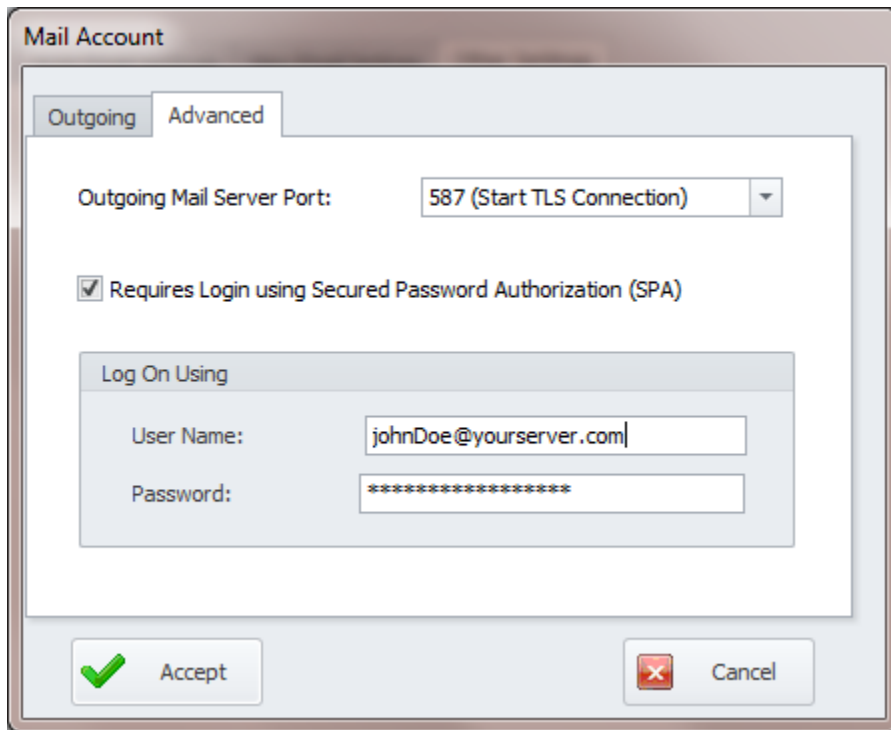
The image shows a 'Mail Account' dialog box with two tabs: 'Outgoing' and 'Advanced'. The 'Outgoing' tab is active. It contains two sections: 'User Information' and 'Outgoing Server Information'. In the 'User Information' section, 'Your Name:' is set to 'John Doe' and 'E-Mail Address:' is set to 'johndoe@yourserver.com'. In the 'Outgoing Server Information' section, 'Outgoing Mail Server (SMTP):' is set to 'smtp.yourserver.com'. At the bottom, there are 'Accept' and 'Cancel' buttons.

- **User Name** – This field is used to identify the default system user.
- **Email Address** – This field is used to identify the email address of the default email account.
- **Outgoing Mail Server (SMTP)** – This the SMTP server name the account is setup to use.

Advanced Settings

The setting on the tab allows you to specify log on information, outgoing port number, and the use of Secured Password Authorization.

The following image illustrates the elements of this tab:



- **Outgoing Mail Server Port** – This setting both specifies the outgoing mail server port and the type of connection to use. Option here include:
 - **25 (Regular Connection)**
 - **26 (Regular Connection)**
 - **465 (SSL Port Connection)**
 - **587 (Start TLS Connection)**
- **Requires Login using Secured Password Authorization (SPA)** - Most remote servers requires this setting to be used. If the server your using required this then check this option.
- **Log On Using** – You need to specify this information even if SPA is not used.
- **User Name** - Specify the name user on your account.
- **Password** – Specify you log on password.

How to Get Started with Maintenance Coordinator

With Maintenance Coordinator we have tried to make it possible to enter things as needed. This to say, if you need to add a mechanic to a work order, you can add the mechanic to the database at the time the work order is created. Most of our lookup screens allow you to add new items as you are selecting them. This approach allows you to get started using the program almost immediately.

The first thing you need to setup is your databases. Everything you enter into the program will be saved to these databases. Please refer to the Security and Databases chapter for more information on how to

do this. Creating new databases is as simple as opening and saving files. Once these new databases are created, be sure to point to them.

The next area to explore and setup are the program's general settings. This is found using the Admin drop down menu and selecting the Program Settings option. This is accessible from the main menu of the application. Here you setup company information, your company logo, your e-mail server, database paths, and other general information. The most important of these is setting up your databases. You can always configure the other setting later on if needed.

Work Orders need the following items available for their creation:

- Mechanics or employees responsible for their completion.
- Equipment the work order will be assigned to.
- Materials or spare parts that will be needed to complete the work order.
- Safety Instructions.
- The actual work instructions.

The items in the above list should be available for the creation of work orders. Equipment information is perhaps the most important of these items and you should work on this list first. Gather information such as descriptions, serial, model and reference numbers. More information can always be added later as needed.

Also dealing with the equipment, you also want to gather any special safety instructions along with recommended planned maintenance instructions. This information is usually available from the equipment vendor or manufacturer. If you can obtain this information in electronic form it would be an added plus as you should then be able to just copy and paste this information into the program (a great time-saver).

The next thing you need to do is build your database of task instructions. This is necessary for planned maintenance tasks only, as you can and should reuse the same set of instructions over and over. For example, say you have five air compressors in your facility it would only make sense to reuse the same set of instructions for all five air compressors.

Once you have built your database of task instructions, you should do the same thing with your safety instructions. Unlike task instructions, safety instructions should be assigned to each and every work order regardless of whether it's a planned maintenance or repair type.

Basically, with the above completed, you are ready to start using the program for the creation of both planned maintenance and repair types of work orders. Please keep in mind that these have only been basic recommendations to get you up and running quickly, there are many more features you need to consider while using this powerful and feature rich CMMS application.

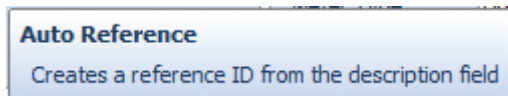
Common Use Features

This chapter 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.

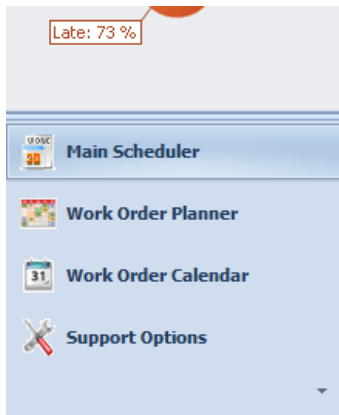
Tool Tips

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.

Shortcut Bar (Outlook Style)

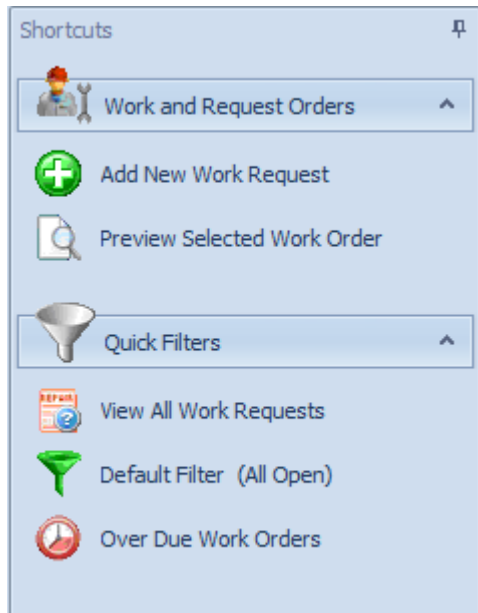


The **Shortcut Bar** allows you to branch to either different parts of the module or program, and can execute commonly used routines. This control breaks things into different groups. Clicking on the large bars opens different groups and displays different options. Clicking on an item within the *shortcut bar* will activate that option.

Clicking the arrow < in the upper left corner will minimize the Shortcut bar to the left of the screen. To expand a minimized *Shortcut bar*, click on the button > containing in its title on the left side of the screen.

Note that most if not all the options on the shortcut bar are also available from drop down menus, ribbons, and the Go menu when available.

Tasks Panels



The *Tasks Panels* allow you to execute commonly used routines quickly. This control breaks things into different groups. Clicking on the arrows will expand or close the different groups and displays different options. Clicking on an item within the Task Panel will activate that option.

Note that most if not all the options on the Task Panel are also available from drop down menus, and the ribbon control when available.

Clicking the **PIN** in the upper left corner will either lock the **Task Panel** in place, or allow it to minimize when not in use. To expand a minimized **Task Panel**, click on the button containing its title on the left side of the screen.

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.

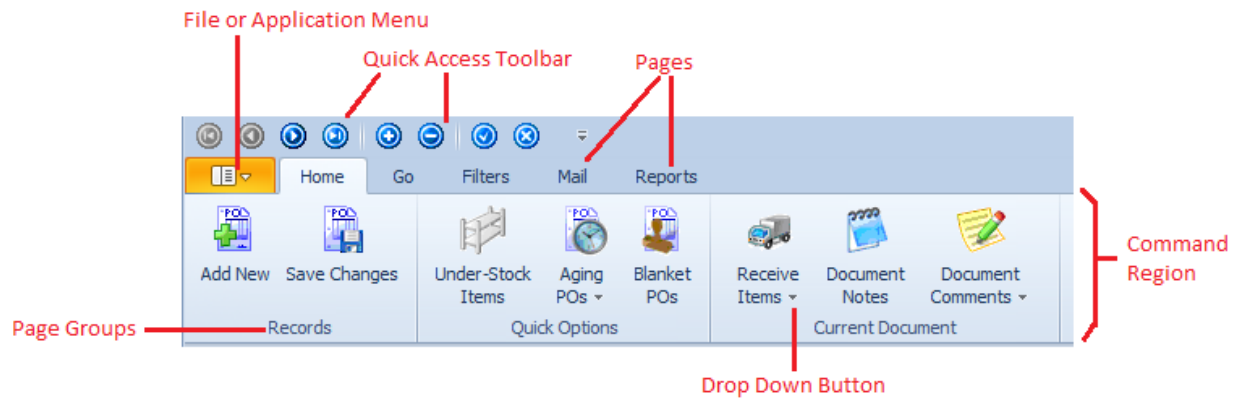
The keyboard **arrow keys** can also be used to navigate through the **Tile Control** buttons. A slight highlight around the button will be displayed to show the selection. Once a button is selected, pressing the **Enter** key will activate the selection.

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.

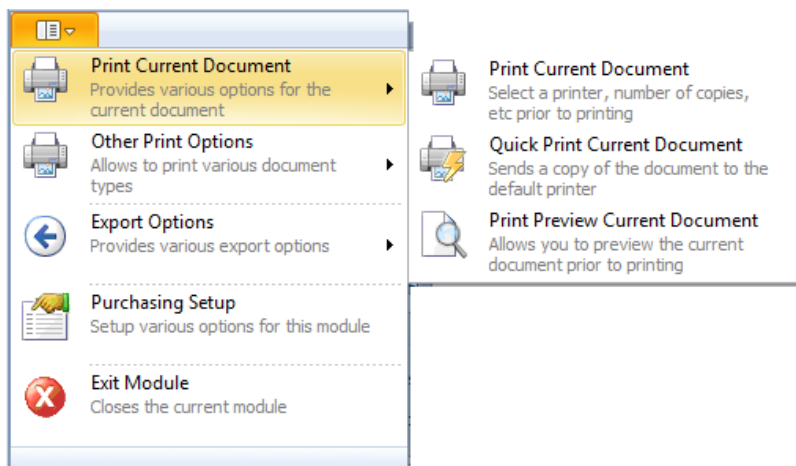
***NOTE:** This control as with many of the controls used by this system can have their appearances change somewhat by the selected theme in use.*

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

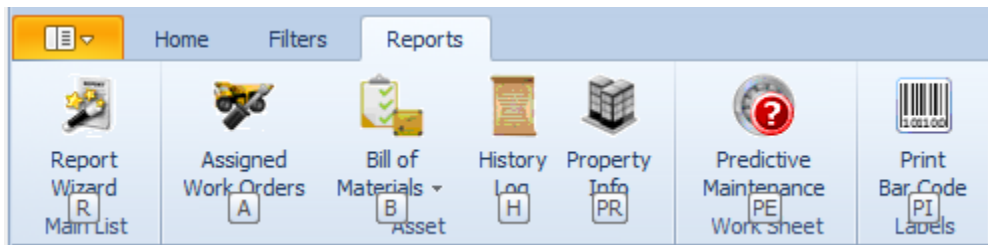
Controls on a ribbon are grouped in Pages. Pages appear on the ribbon with the same look as a conventional tab control. To access controls on different pages simply click on the page header, and then click on the appropriate control.

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 down 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.

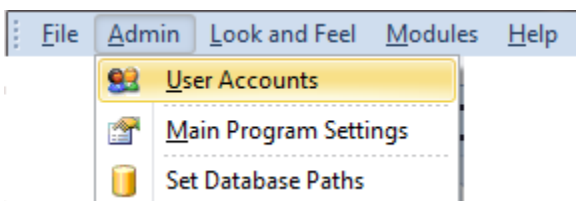
Ribbon – Hot Keys

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.

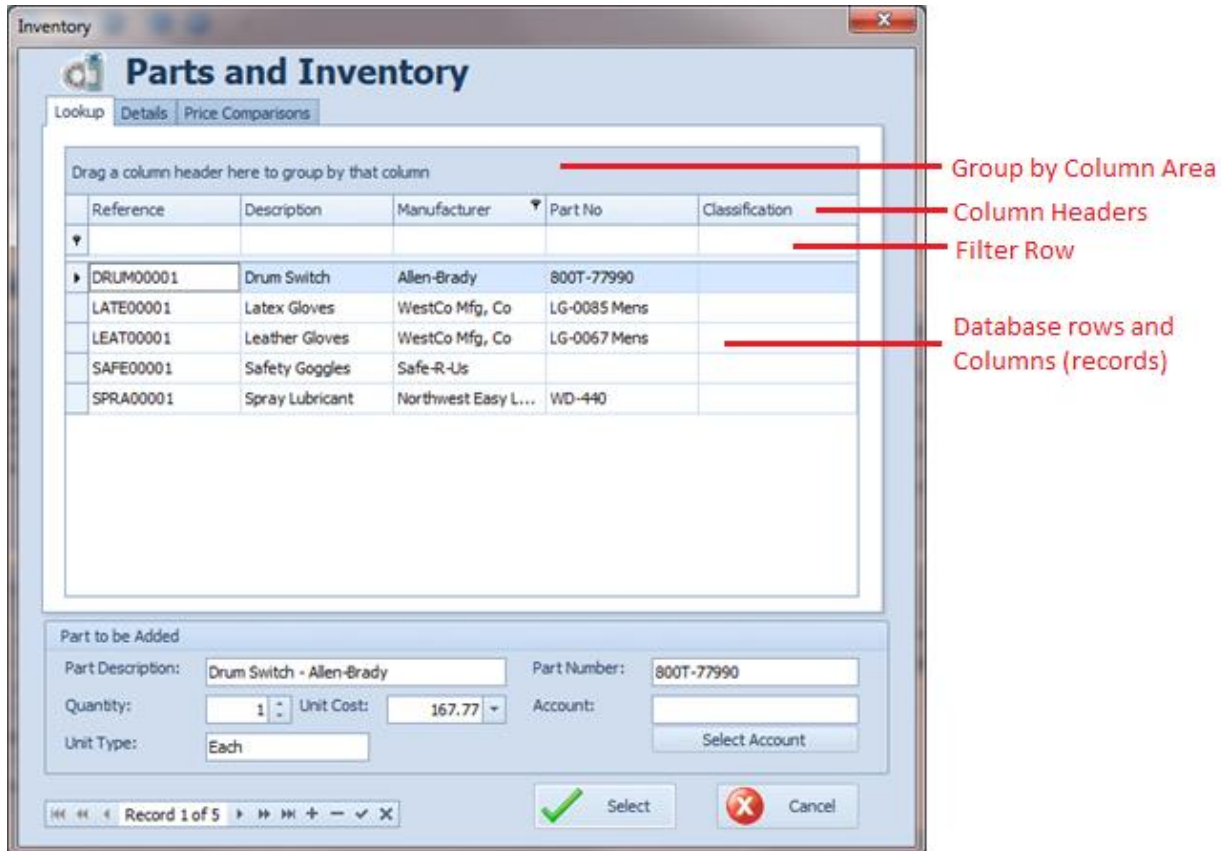
The following are the elements of the data control, reading left to right.

- **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.

Manufacturer			
Description	Reference	Part No	Classification
▼			
> Manufacturer: Allen-Brady			
> Manufacturer: Northwest Easy Lubes			
> Manufacturer: Safe-R-Us			
▼ Manufacturer: WestCo Mfg, Co			
Latex Gloves	LATE00001	LG-0085 Mens	
Leather Gloves	LEAT00001	LG-0067 Mens	

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.

	Part No	Reference ▼	Description	Manufacturer	Classification
▼					
	WD-440	SPRA00001	Spray Lubricant	Northwest Easy L...	

To rearrange columns:

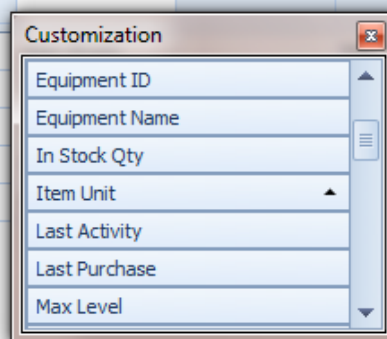
- Just click and hold the column of your choice.
- Drag the column to its new location and release the mouse button.

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.

Drag a column header here to group by that column

	Part No	Reference	Description	Manufacturer	Classification	Location
▼						
	800T-77990	DRUM00001	Drum Switch			storeroom
	LG-0085 Mens	LATE00001	Latex Gloves			storeroom
		SAFE00001	Safety Goggles			
	WD-440	SPRA00001	Spray Lubricant			
	LG-0067 Mens	LEAT00001	Leather Gloves			storeroom



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.

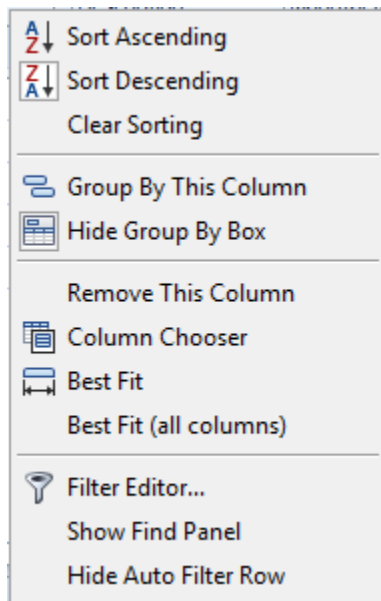
Removing Columns

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

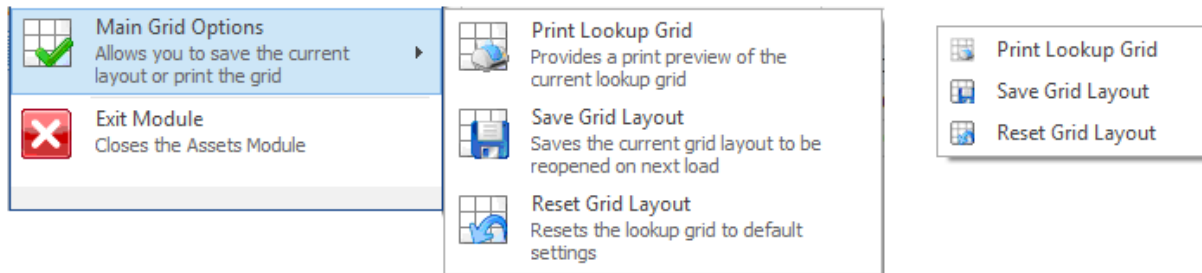
There are other options available to the Lookup Grids that the user can explore on their own. To access these options just right click within the grid's header area.



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.

Drag a column header here to group by that column

			Task ID	Subject	Start Date	End Date	Location	Classification
			1101--3	Trash compactor not working	4/15/2013	4/30/2013	Support Equipment ...	
			1105-6	Work Order from Issue: 11...	10/8/2012	10/22/2012		

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 within 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:

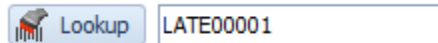
Search Criteria	Description
register	Selects records that contain the "register" string in any search column.
check register Dave	Selects records that contain either "check" or "register" or "Dave" strings in any search column.
"check register"	Selects records that contain "check register" in any search 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.

Scanned Lookups (Barcodes Support)

Many of the Lookup screens of the system use routines that are designed to work with barcode scanners. With these routines the user only needs to select the control, scan a barcode, and if available, the corresponding record should be selected.

The system supports the 'keyboard wedge' technology for its input scanning devices. These types of scanners are widely available and are normally very cost effective. We they actually do is read a barcode and then sends the key strokes to the selected control as if typing this information from a keyboard.



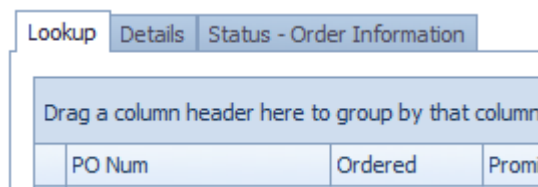
To use the scan lookup:

- Move to a lookup screen that supports this feature. If supported there should be a Lookup button adjacent to an input text box.
- Click on the Lookup button. This does two things: It clears the input control of any previously scanned values and selects the control in preparation of the next scan.
- Using a supported scanner, scan the barcode. The program will filter the database by the scanned value.

NOTE: If you know the reference value of the record and you don't have a scanner, you can also type this information directly into the lookup input box.

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.


General Information

Machine Type
Pneumatic Dwg
Full Load Amps

Date of Mfg
Mechanical Dwg
Phases

Electrical Dwg
Supply Voltage
Air Supply

Picture - Links
Appraisal - Bar Code
Property Assignments

Asset Picture


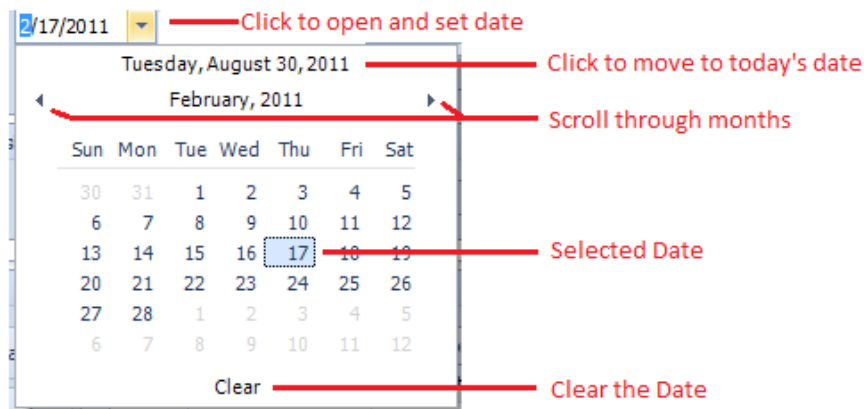
Linked Assets

Description
MULT00001 - Multi-Lane Palletizer

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.

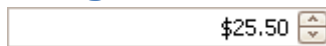
Undo

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.

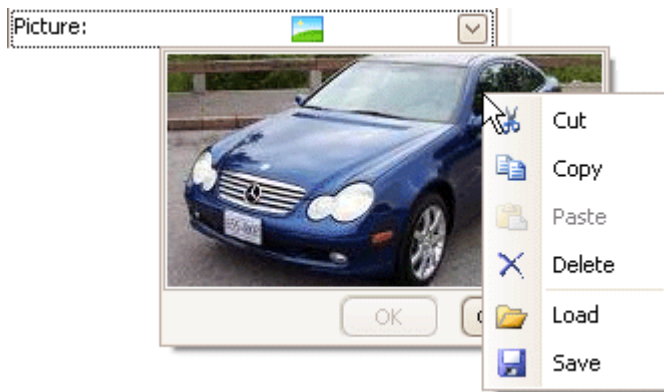
Change Numeric Values



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

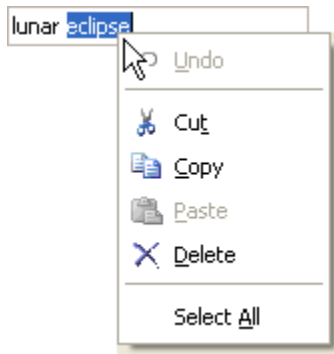
Edit Images

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



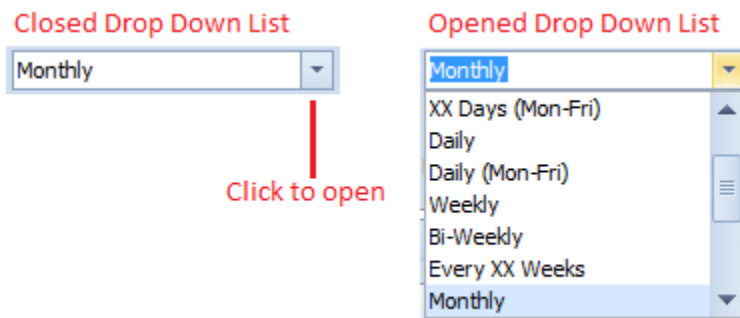
Editor Context Menu

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



Drop Down List Boxes

Used throughout 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.

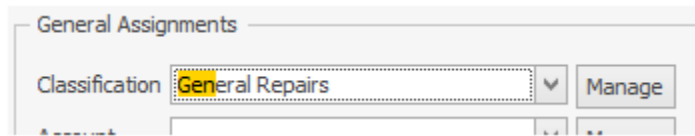
Data Quick Entry

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.

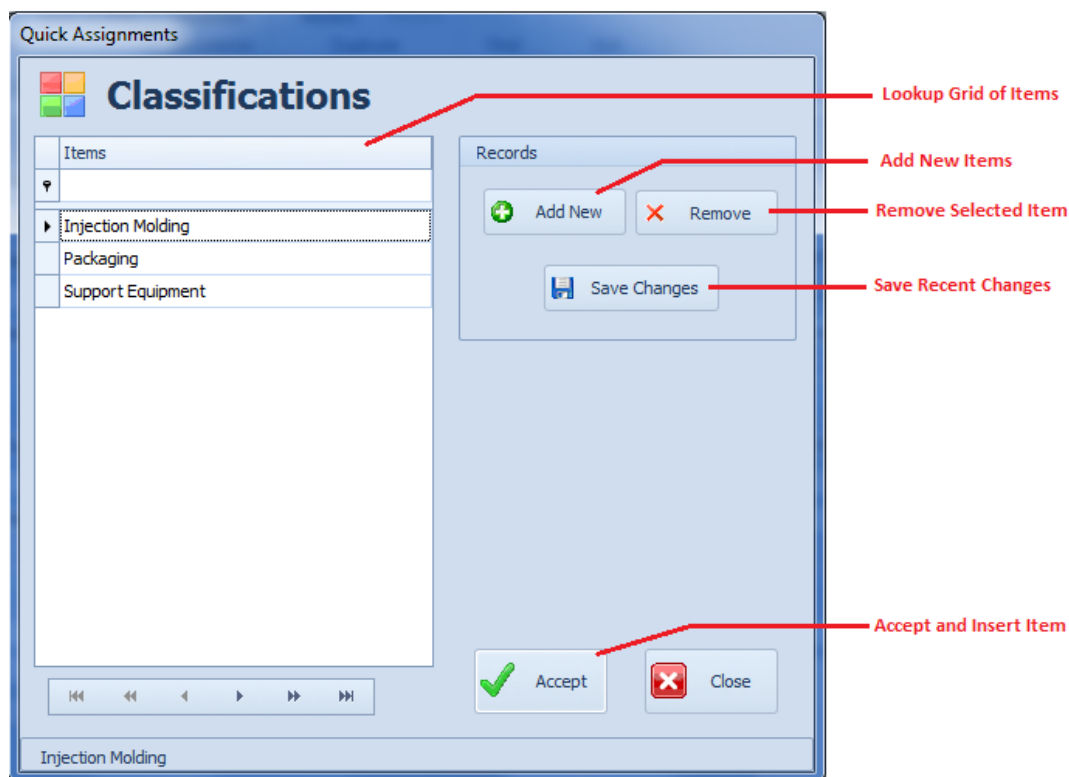


You add and delete items in these drop downs by click on the **Manage** button adjacent to these fields.

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:

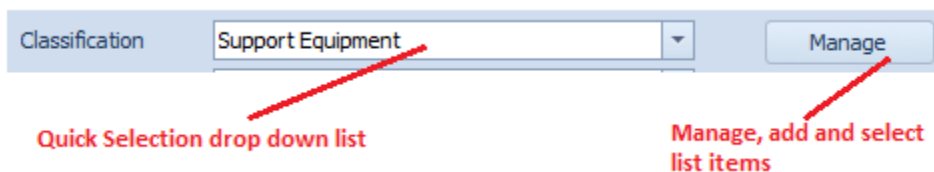
- Click on the ellipse (...) button, click on the **Manage** button or click the **Select** button adjacent to the field that you want to make an assignment to.
- Move to the **lookup grid** and click on the selection of your choice.
- Click on the **Accept** button.

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.

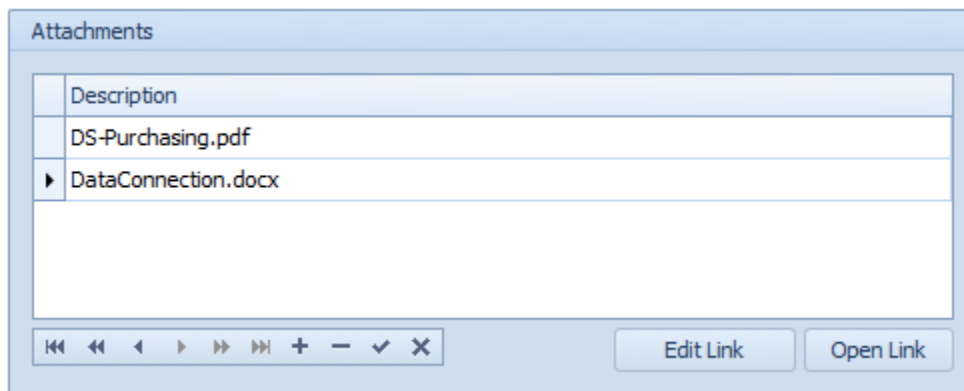
If the item you want is not within the list, you can click on the **Manage** button adjacent to the entry field to add the item as described in the previous section.

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.

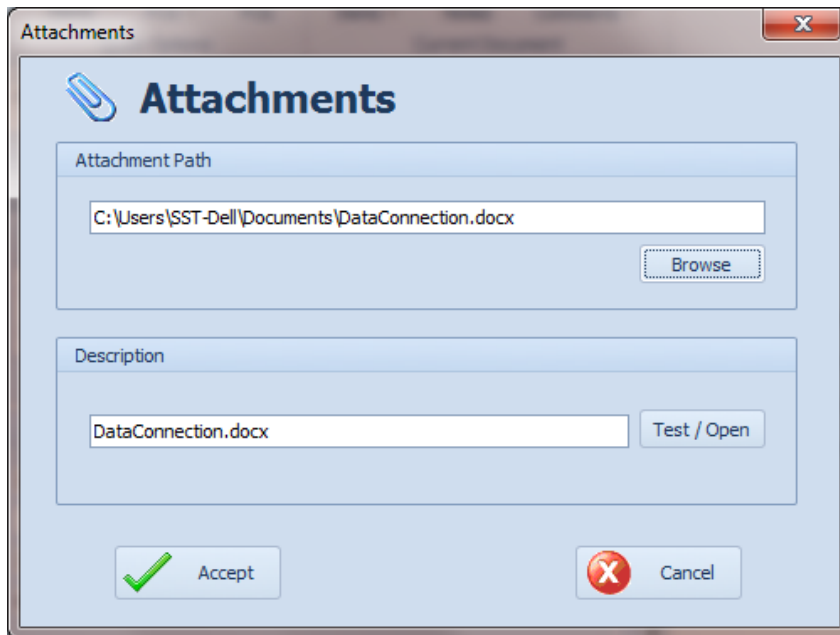


The image provided is what the Attachment feature typically looks like. This appearance can change somewhat from module to module, but in general it has the same general look and features no matter where used.

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).

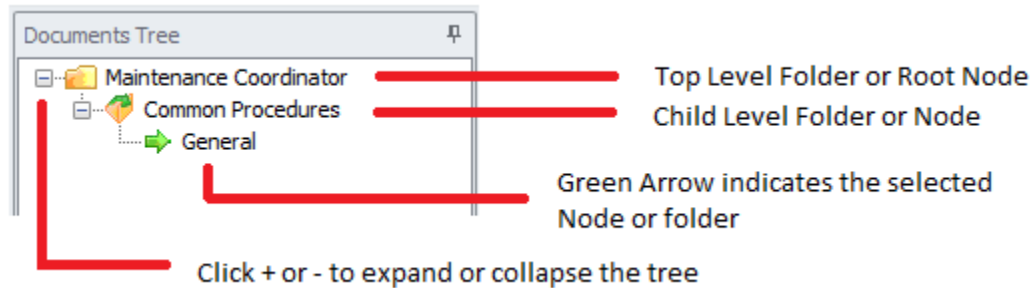
Using Attachments on More Than One Computer

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.

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



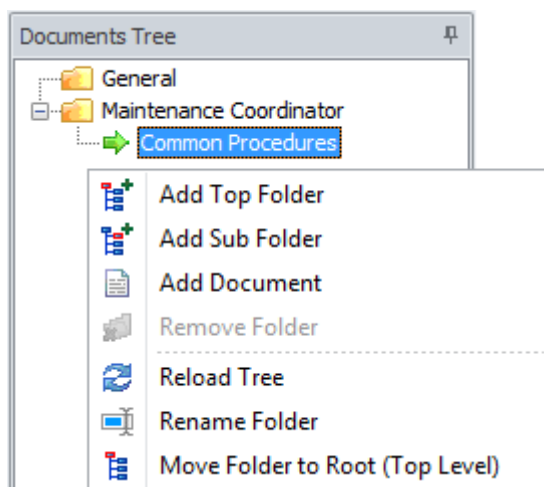
The **Documents Tree** allows for the organization of your documents in **Folders** or nodes. Basically you are not limited to the number of folders you can create and use. You can also create as many levels of these folders as maybe needed (parent – child folders). The supplied illustration shows the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

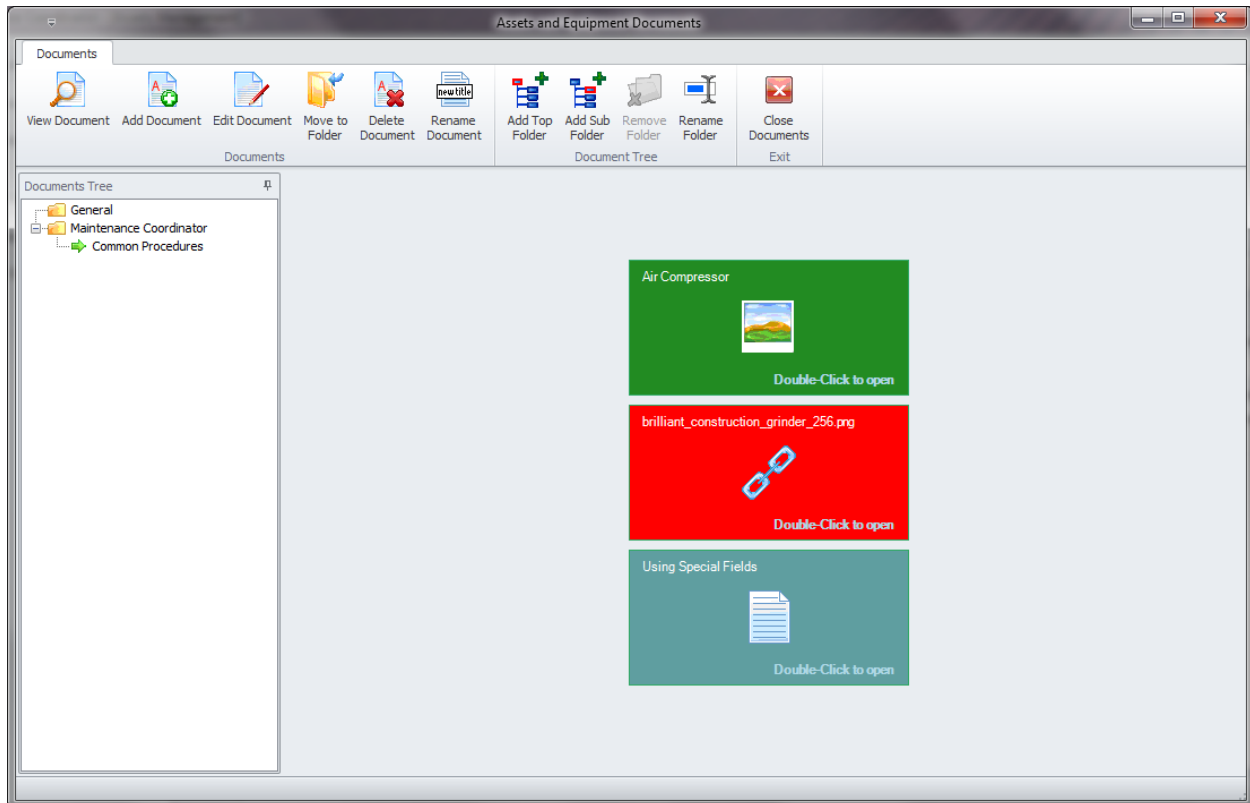
- Move to the **Documents Tree** and click on the folder you want to move.
- **Right mouse click** on the folder you want to move to invoke a popup menu.
- Click on the **Move Folder to Root (Top Level)** option.

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.

Documents Feature

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.

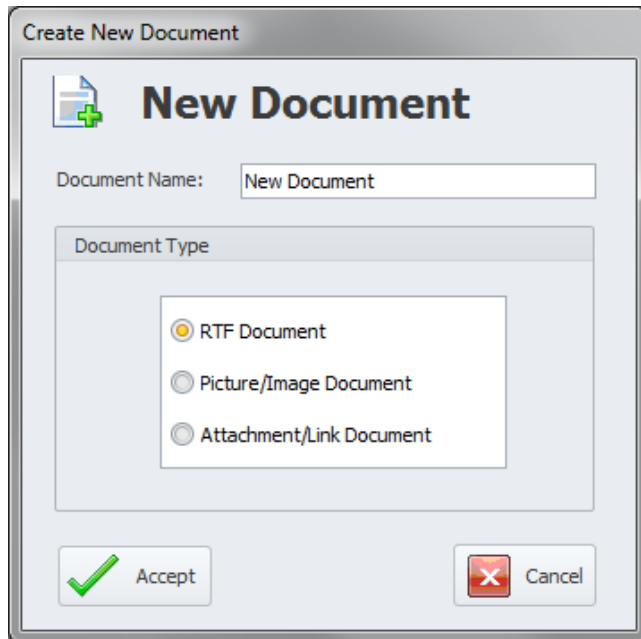
You can create three different types of documents with this feature. One is a picture document, which can be in the GIF, JPG, BMP, PNG, TIF and ICO formats. The next type of documents can be the rich-text editor type. These editor type documents features the use of our built-in Rich Text Editor. This 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.

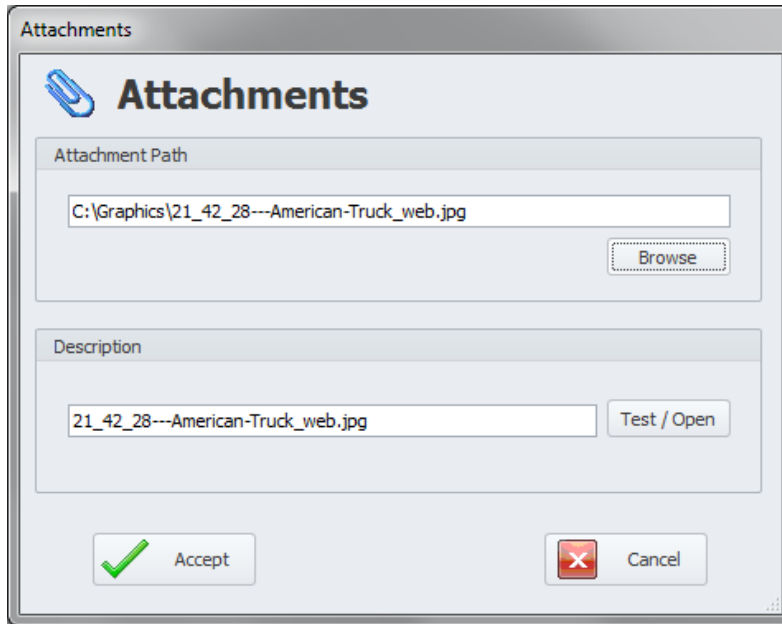
To create a new Picture/Image document

- 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.

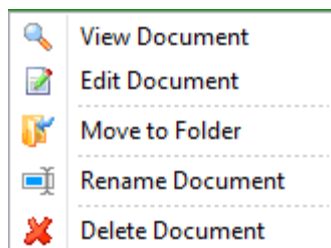
- From the invoked **Create New Document** dialog, move to the **Document Name** text box and enter a name for your new document.
- Move to the **Document Type** section and select the **Attachment/Link Document** option
- Click the **Accept Button** to invoke the Link Setup dialog.



- 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.

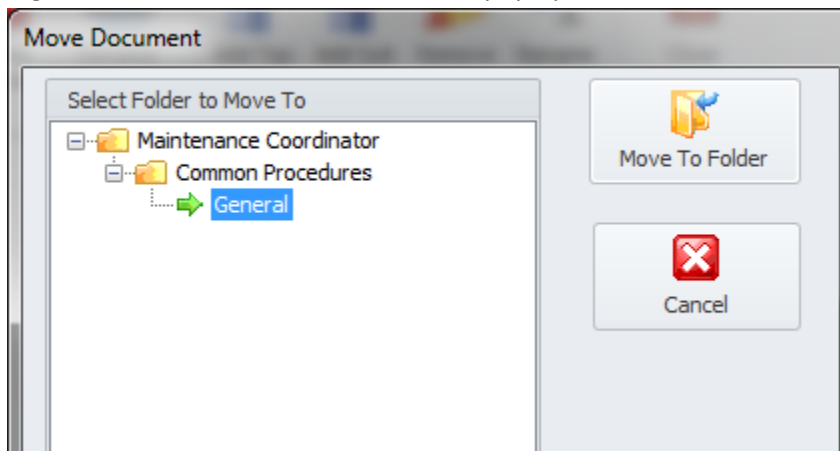


To edit a document

- 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

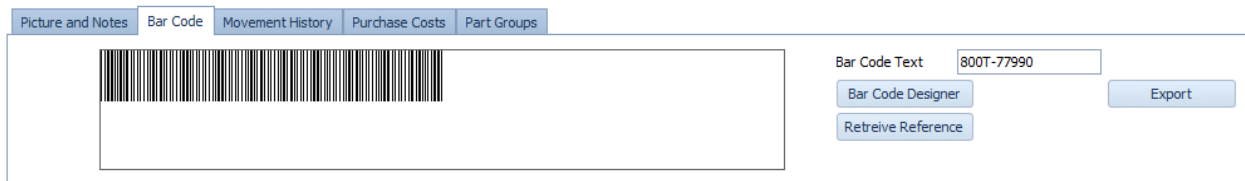
- Move to and click on the folder that contains your document from within the **Documents Tree** to display the documents assigned to that folder.
- **Right click** on the document to invoke a pop up menu. Select the **Delete Document** option.
- When prompted about deleting the document, click the **Yes**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

Creating Barcodes and the Designer

A few of the modules in the system allows for the creation of various barcodes. These barcodes can be printed or exported for use with other applications. Barcode creation is supported in the *Inventory*, *Assets* and *Tools Database* modules. *Work Order* and *Purchasing* documents also use barcodes, but these are not user definable and they use the Code39 style.

To access the barcode routines

- From the Inventory or Assets module – From the main tab control click on the **Options** tab. Next click on the **Barcode** tab near the bottom.
- From the Tools Database module. Click on the **Details** tab followed by the **Barcode** tab near the bottom of the screen



The screenshot shows a software interface with a tabbed menu at the top: 'Picture and Notes', 'Bar Code', 'Movement History', 'Purchase Costs', and 'Part Groups'. The 'Bar Code' tab is selected. Below the tabs is a large rectangular area containing a barcode. To the right of this area, there is a 'Bar Code Text' input field containing the text '800T-77990'. Below this input field are three buttons: 'Bar Code Designer', 'Retrieve Reference', and 'Export'.

To insert the current Reference ID to be used in the barcode creation:

- Click on the **Retrieve Reference** button or type the barcode text in the space provided.

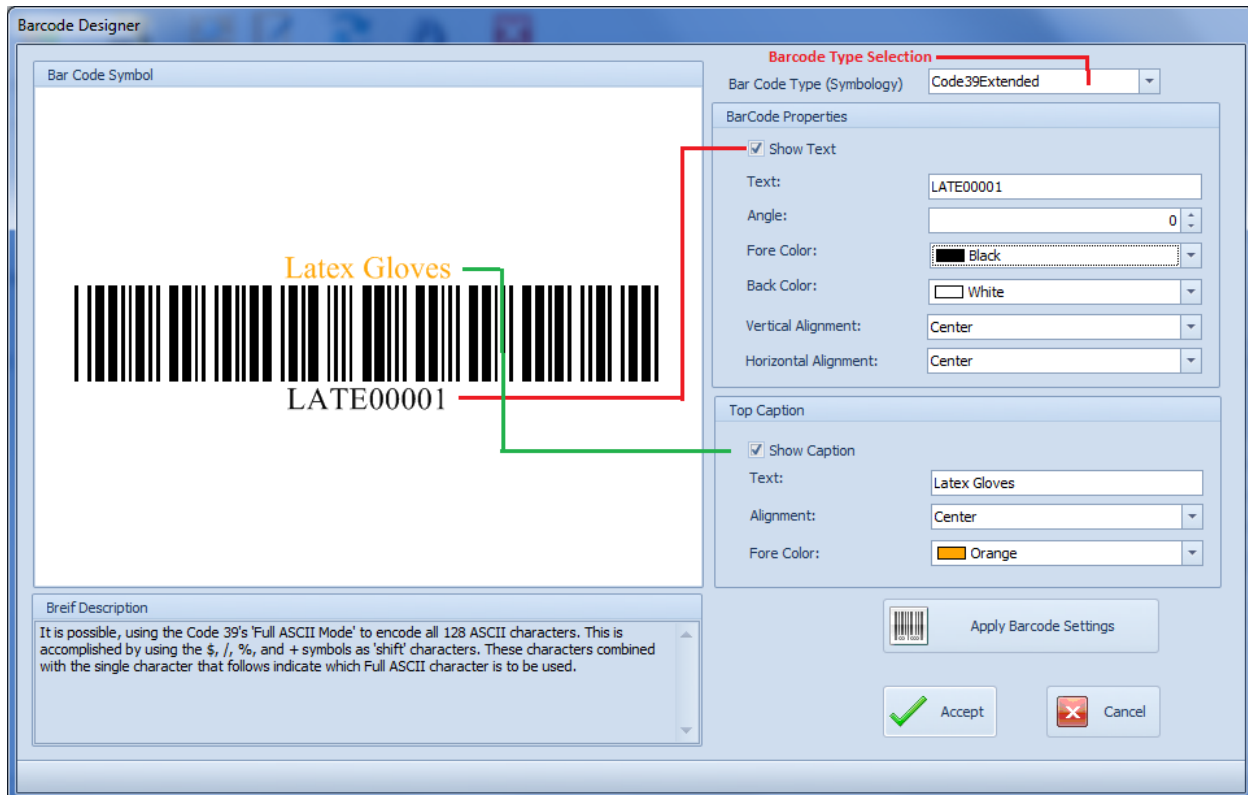
Note the built-in barcode lookups use the Reference fields to find matching criteria

To access the Barcode Designer:

- Click the **Bar Code Designer** Button.

Barcode Designer

With the *Barcode Designer* you can specify the type of barcodes to create, specific the barcode text, the angle of the barcode, the colors to use, a top caption and more. Please note that not all the combinations available will function properly with your system. You may want to experiment a little to see what works with whatever scanner you may end up with. The nice thing is that you can create various barcodes styles, and even if they don't always work with your system, you can always export the images for use with other systems.



To create a barcode using the designer

- Move to the **Bar Code Type** drop down and select the barcode style you want to use. As barcode types are selected a Brief Description of the barcode style is shown in the lower left hand corner. There are 25 barcode styles to choose from.
- If you want to display the barcode text on the label, checked the **Show Text** checkbox.
- The Text field is both the text shown above and more importantly the text used to create the actual barcode. For our purposes this is normally the record's reference ID.
- You can change the angle in which the barcode is shown in the image by changing the **Angle** value.



- **Fore Color** represents the barcode and the text color. Click the down arrow to expand the color picker to assign the desired color.

- **Back Color** represents the back ground color of the barcode image. . Click the down arrow to expand the color picker to assign the desired color.
- You can change the position of the barcode text value by changing the **Vertical** and **Horizontal Alignment** values
- To show the **Top Caption** text, check the **Show Caption** checkbox.
- To edit the Top Caption displayed text, edit the information in the **Top Caption – Text** edit box.
- To adjust the Top Caption Alignment change the value in the **Top Caption – Alignment** drop down list.
- To change the color used by the Top Caption, click the down arrow adjacent to the **Top Caption – Fore Color** to expand the color picker and then make your selection.
- To apply and see how your settings have affected the barcode image, click on the **Apply Barcode Settings** button.
- To accept the currently designed barcode and apply it to the current record click on the **Accept** button.

To export the barcode image

- Right mouse click on the image and choose the **Export Barcode** option.
- Browse to where you want to save the image to,
- Type in a name for the file in the **File Name** text box.
- Select the image export type by selecting the appropriate value from the **Save as type** drop down. Supported options are bmp, jpg, gif or png.
- Click the **Save** button.

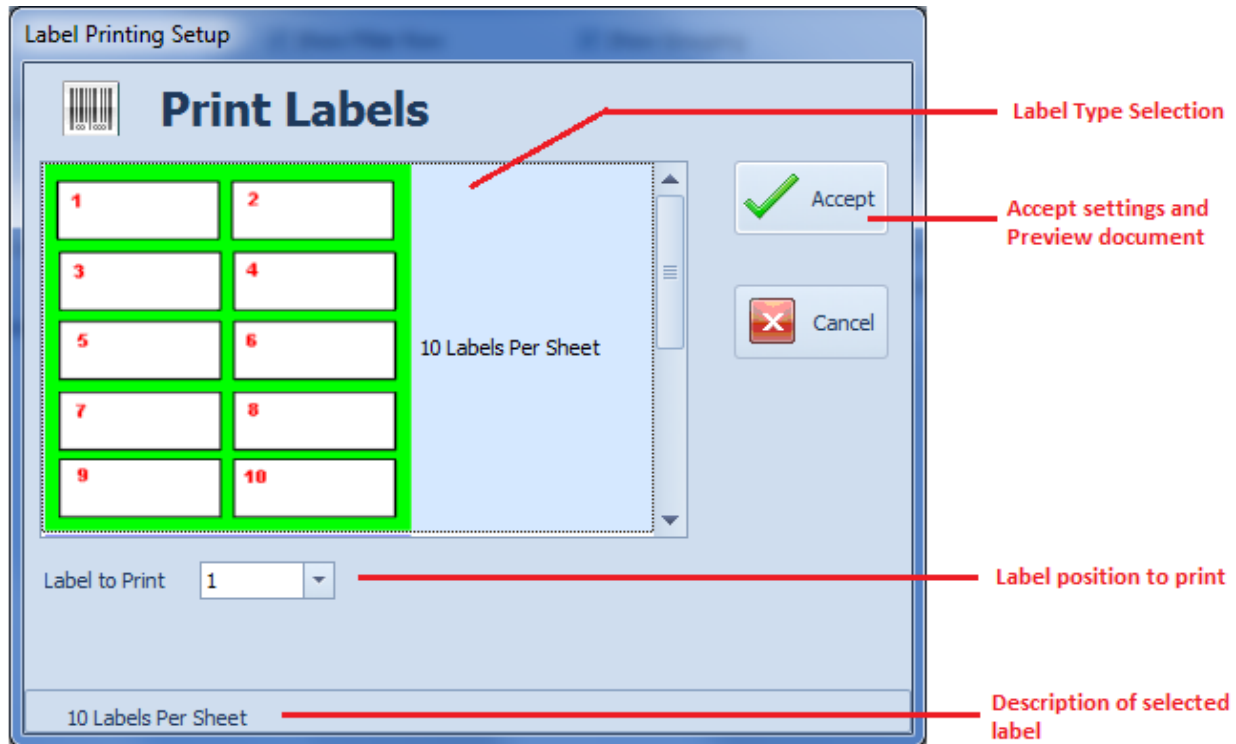
To copy the barcode image to the clipboard

- Right mouse click on the image and choose the **Copy Barcode** option.

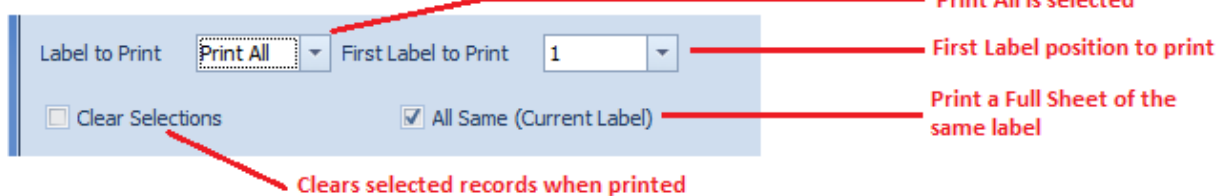
Printing Barcode Labels

In place of having to buy expensive barcode label printers, this software system supports printing directly to either ink jet or laser printers. Also supported are Avery 5262 (6 per sheet), and Avery 8810 (30 per sheet) compatible labels. The 5262 labels are designed to be used as bin box labels, or for directly labeling an asset. We figured that 8810 labels would be small enough to stick to most individual items.

The following illustration shows the element of the Print Labels dialog screen.



Extended Options when Print All is selected



To print a single barcode label:

- Select the record that contains the label you want to print.
- Ensure that the barcode label has been created and is saved in the database.
- Move to the **Reports** tab in the ribbon and click on the **Print Bar Code** option.
- From the invoked **Label Printing Setup** screen, move to **Label Type Selection** list and select the type of label you wish to print to by clicking on it. If selected properly its description should be shown in the lower left hand corner.
- Move to the **Label to Print** drop down and select the label number to print to. If you are printing multiple labels, this label is the starting point of the print job.
- Click on the **Accept** button to preview the document.

To print multiple copies of the same label:

- Select the record that contains the label you want to print.
- Ensure that the barcode label has been created and is saved in the database.
- Move to the **Reports** tab in the ribbon and click on the **Print Bar Code** option.

- From the invoked **Label Printing Setup** screen, move to **Label Type Selection** list and select the type of label you wish to print to by clicking on it. If selected properly its description should be shown in the lower left hand corner.
- Move to the **Label to Print** drop down and select the **Print All** option.
- Move to the **First Label to Print** drop and select the starting label to commence printing at.
- Check the **All Same (Current Label)** checkbox.
- Click on the **Accept** button to preview the document.

To print multiple labels from different records:

- Scroll through the database and place a checkmark in the Selected checkbox of each record you would like to print a label for
- Move to the **Reports** tab in the ribbon and click on the **Print Bar Code** option.
- From the invoked **Label Printing Setup** screen, move to **Label Type Selection** list and select the type of label you wish to print to by clicking on it. If selected properly its description should be shown in the lower left hand corner.
- Move to the **Label to Print** drop down and select the **Print All** option.
- Move to the **First Label to Print** drop and select the starting label to commence printing at.
- Place a check in the **Clear Selections** checkbox. This will clear selected records so they will not be included a second time.
- Ensure that the **All Same (Current Label)** checkbox is NOT checked.
- Click on the **Accept** button to preview the document.
- Repeat the above steps until there are no more records selected.

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.

Parts and Inventory

Lookup Details

Drag a column header here to group by that column

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

Record 1 of 5

Select Cancel

Latex Gloves

Parts and Inventory

Lookup Details

Details

Reference: DRUM00001 Check Auto

Description: Drum Switch

Manufacturer: Allen-Brady

Part No: 800T-77990

Vendor: Gardner and Denver

Location: Main Storeroom

Classification:

In Stock Qty: 1

Inventory Control

Min Level: 1

Max Level: 1

Reorder Qty: 1

Unit Type: Each

Items in Units: 1

Unit Price: 167.77

Record 1 of 5

Select Cancel

Latex Gloves

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.
- Click 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.
- Click on the check (**post**) button in the data control to save your changes.

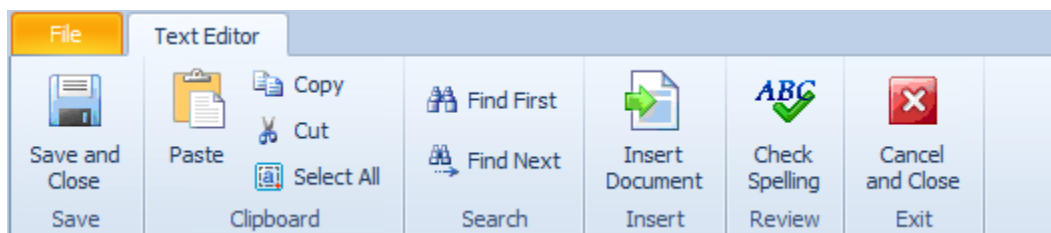
To delete a record (when available):

- 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,
- Click on the check (**post**) button in the data control to save your changes

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

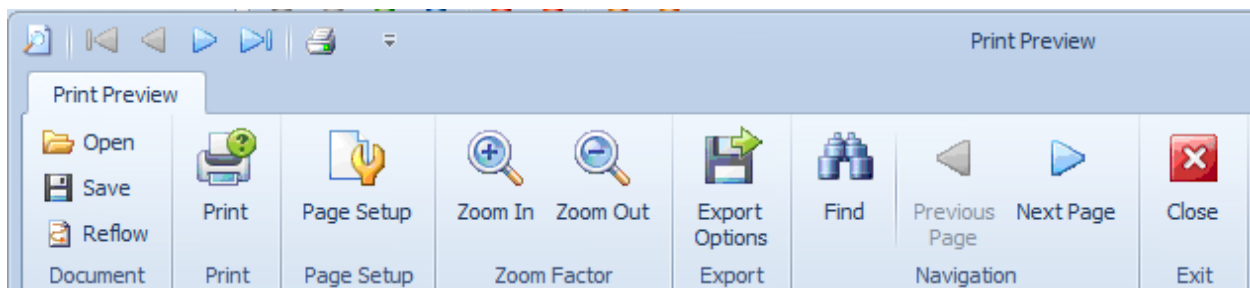
To print preview the loaded document:

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

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:

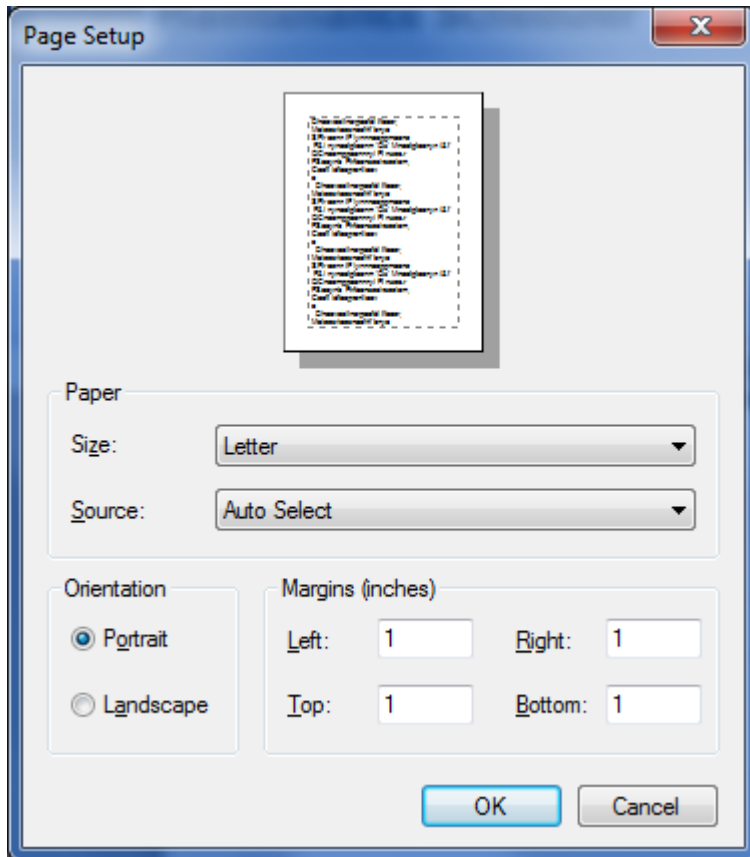
- Click the **Printer** icon in the quick access toolbar or click on the **Print** option in the ribbon.
- From the *Print* setup the print options to your liking.
- Click the **OK** button.

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:

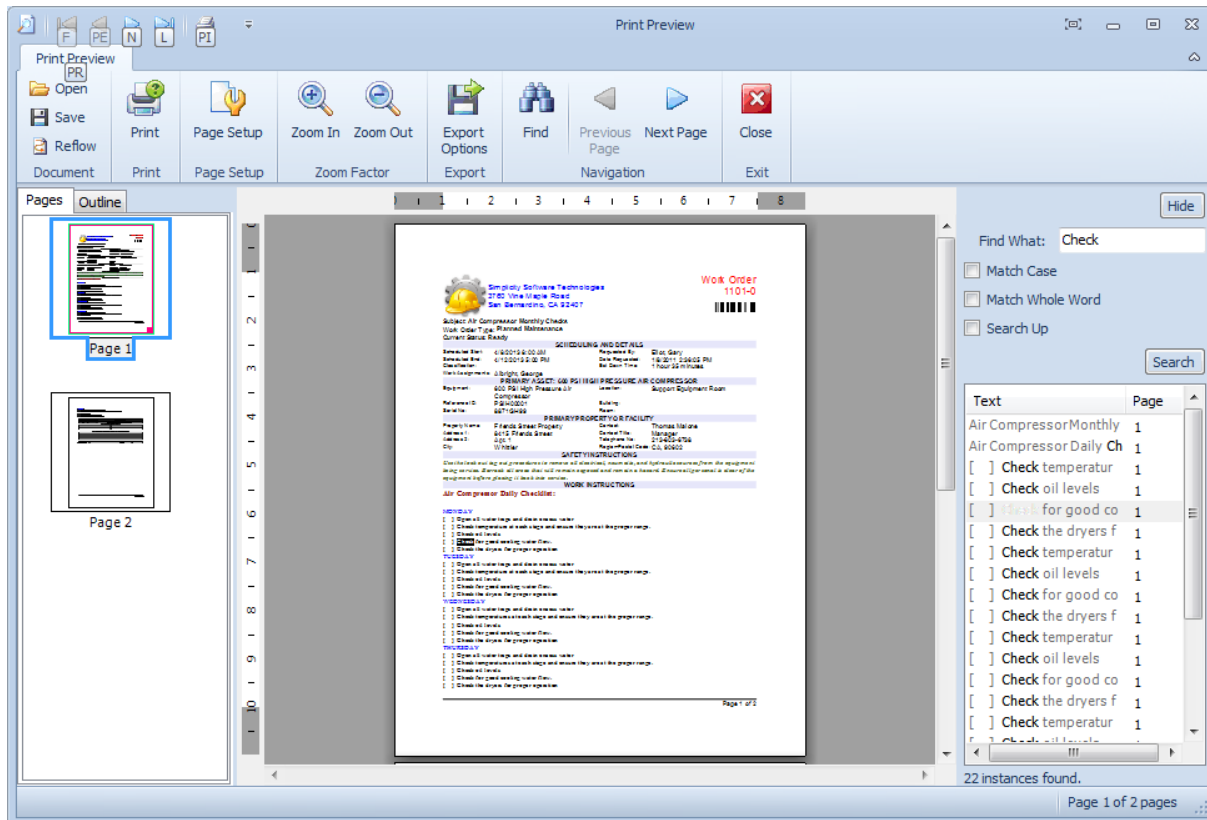
- Move to and click on the **Find** button in the ribbon. This will cause a search dialog to be displayed on the right hand side of the *Preview* screen.
- Move to the **Find What** text box, and type in the text to search for.
- Place a checkmark in the options you want to apply to your search:
 - Match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

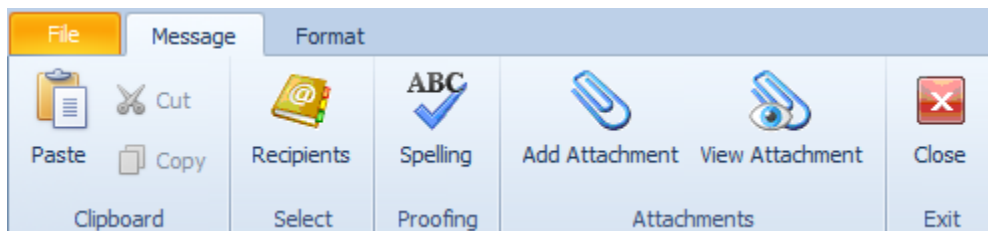
- Click on the **Hide** button.



Email Composer

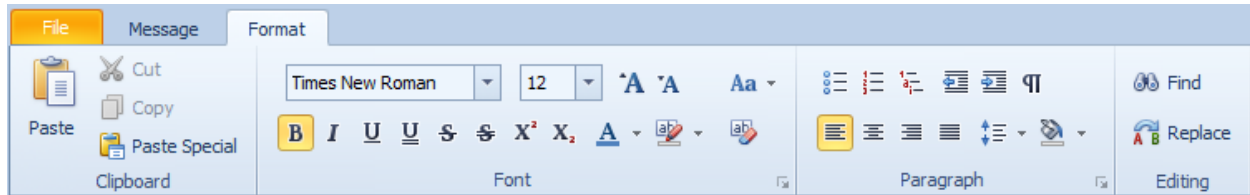
The E-mail Composer is for writing and sending e-mails to vendors, other employees, or anyone you so choose. You can import saved files with this editor, along with checking your spelling.

The following elements are found on the **Message** tab of the composer's ribbon control:



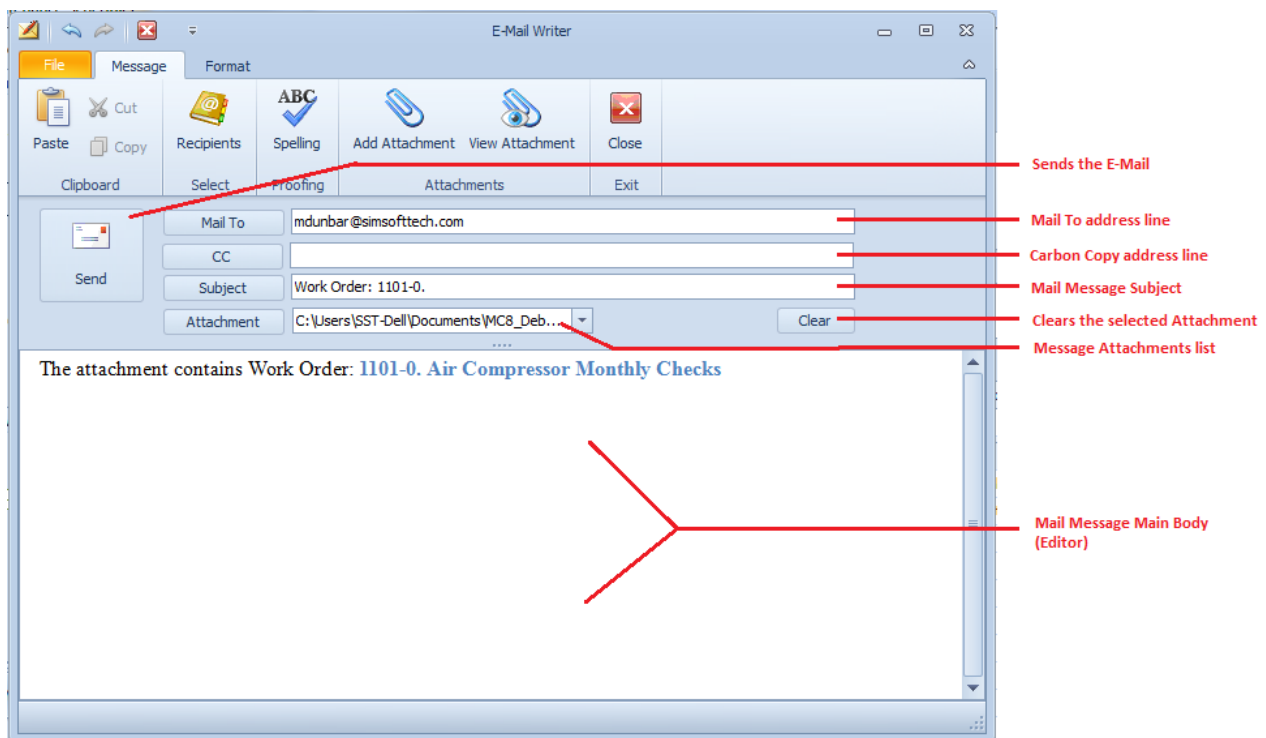
- **Paste** – Paste the contents of the clipboard into the main body area.
- **Cut** – Cuts selected text and stores it in the clipboard.
- **Copy** – Copies the selected text and store the copy in the clipboard.
- **Recipients** – Allows you select email recipients for the **Mail To** or **CC** fields.
- **Add Attachment** – Allows you to browse for, and add attachments to the email message.
- **View Attachment** – Allows you to open and view the selected attachment.
- **Close** – Exits the composer.

The following is the image of the **Format** tab of the composer's ribbon control:



For information on these options we invite you to read the chapter on the *Rich Text Editor*.

The following image illustrates the layout of the *E-Mail Writer*:



Message Recipients

To add mail recipients to your email message:

- Click on the **Recipients** button in the ribbon, click on the **Mail To** button, or click on the **CC** button.
- Follow the instructions found in the *Mail Recipients* section of this chapter.

Message Attachments

To add attachments such as documents and images to your email message:

- Click on the **Add Attachment** button in the ribbon, or click on the **Attachment** button.
- Use the File Open Dialog as explained by the current operating system.
- When the attachment selected, click the **Open** button.

Viewing Message Attachments

To view or open an attachment:

- Click the down arrow on the **Attachments** field.
- Click to select the attachment you want to open or view.
- Click on the **View Attachment** option in the ribbon.

Message Main Body

This email writer allows you to create email messages written in the HTML format, which is popular in most email applications. To compose your message:

- Move to and start editing your document in **Main Body** area.
- You can format your document using the options on the **Format** tab of the ribbon control.

Sending Your Message

To send your email message:

- Click on the **Send** button.

Saving Your Message

You can save the contents of the *Message Main Body* to file for possible reinsertion at a later time. To save the main document to file:

- Compose and format your document to your liking.
- Open the **File** menu and select the **Save** or **Save As** options.
- Use the *Save As Dialog* as explained by the current operating system. The following file types are supported: rtf, txt, htm, html, mht, doc, docx, odt, xml and epub.
- Enter a name for your file in the **File Name** area and click the **Save** button.

Opening a Saved Message

You can insert a saved document into the Message's Main Body by:

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

Printing the Message's Main Body

To print the message's main body"

- Open the **File** menu.
- Click on the **Print Options** button to expand the menu.
- Click on the print option of your choice.

Mail Recipients

The *Mail Recipients* dialog screen allows you to add and edit the recipients to be used when sending emails. This includes the **Mail To** and in many cases the **CC** (carbon copy) recipients as well.

Mail Recipients

Employees Vendors/Contractors

☐ Active Employees Only ☐ Show Filter Row

Name	Reference	Job Title	Email
Martin, Scott	MART00001	Maintenance Mechanic	
Murray, Fred	MURR00001	Maintenance Mechanic	fmurray@gmail
Eliot, Kate	ELIO00001	Production Manager	geliot@aol.com
▶ Albright, George	ALBR00001	Maintenance Mechanic	georgea@abc.com

Mail To geliot@aol.com;georgea@abc.com

CC jdenver@hol.com

Accept Cancel

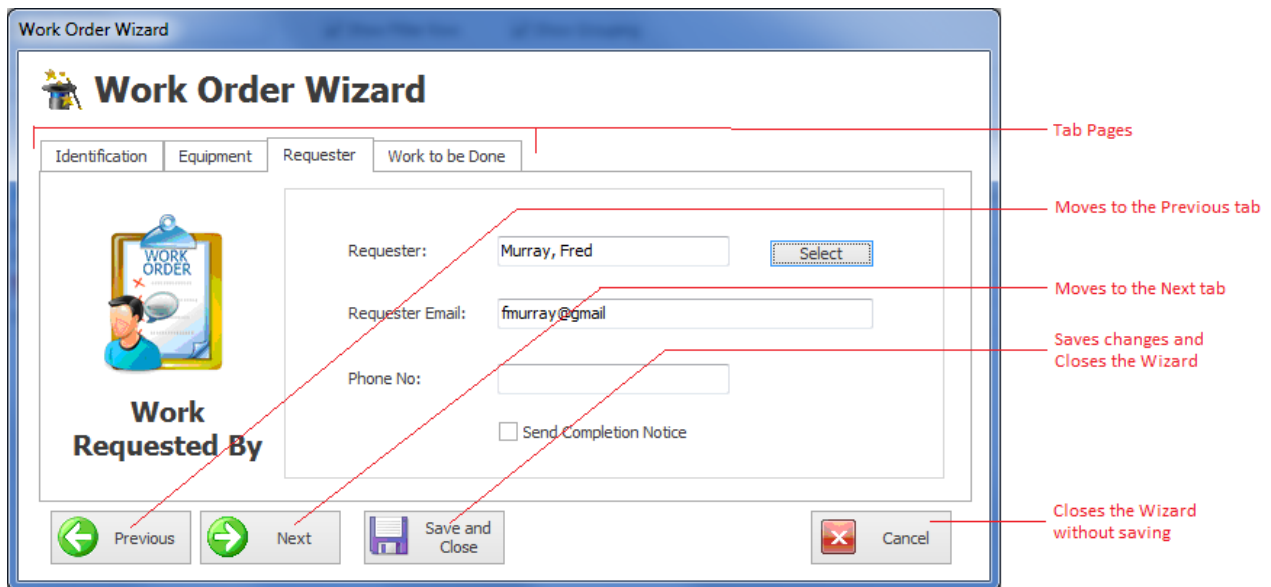
To add recipients:

- Move to either the **Employees** or **Vendors/Contractors** tab to show the appropriate list of possible recipients.
- Click on the record that contains the email address you want to add from those listed.
- Click on either the **Mail To** or **CC** buttons to add the selected address to the appropriate field. Additional addresses are separated with a semi-color (;).
- If known, you can also type addition email addresses in the spaces provide, separating the addresses with a semi-colon.
- When done editing your recipients lists, click on the **Accept** button.

Work Order Wizard

The **Work Order Wizard** is accessible from various modules in the system, and will help ease in the work order creation by stepping you through the process. Some of the modules supported is the **Work and Requests** module, **Issue Tracking** modules and the **Safety Management** module. The **Maintenance Scheduler** module uses its own modified wizard.

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:

Work Order Wizard

Identification | Equipment | Requester | Work to be Done

Work Order Identification

Subject: Repair roll up door between production and warehouse area

Task ID: 1406-10

Location: Main Facility

Task Type: Standard Work Order

Previous Next Save and Close Cancel

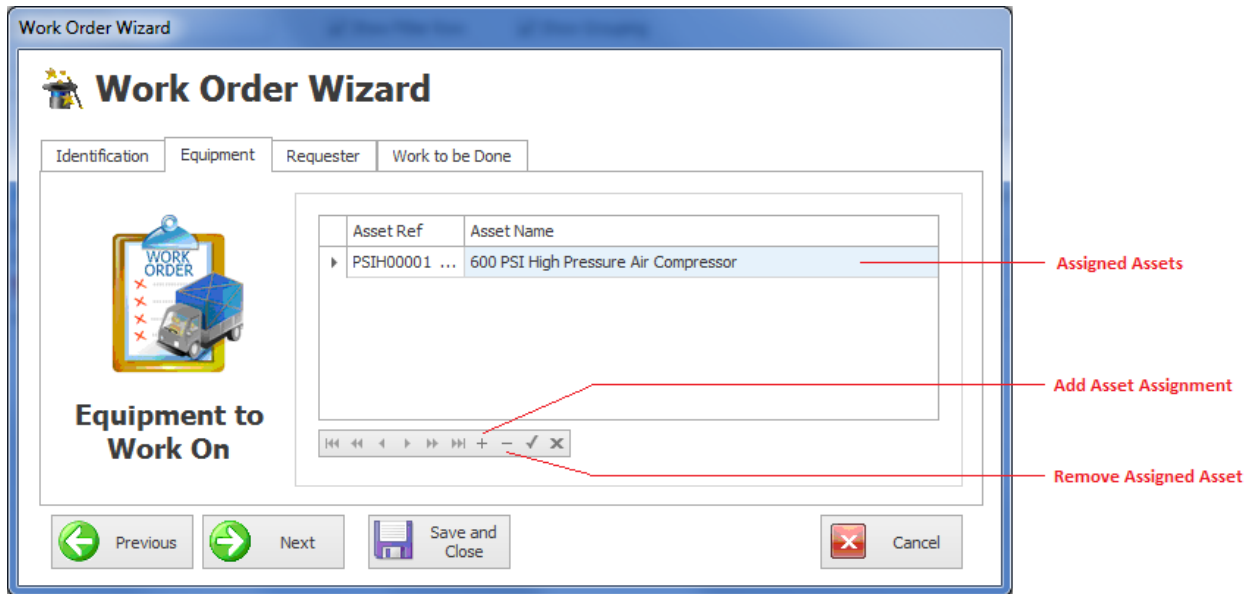
Callouts:

- Brief description of work to be performed
- Task Identification Number
- Verify if Task ID is Unique
- Location at which the work will be performed
- Work Order Type Assignment

- **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:



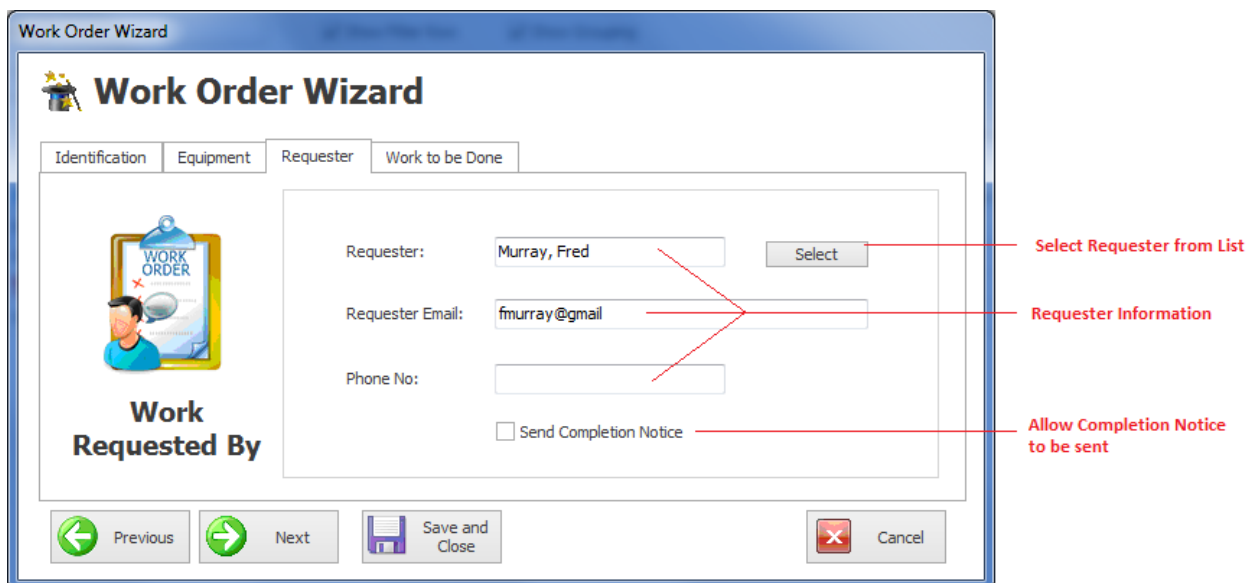
To assign an asset to the work order:

- 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:

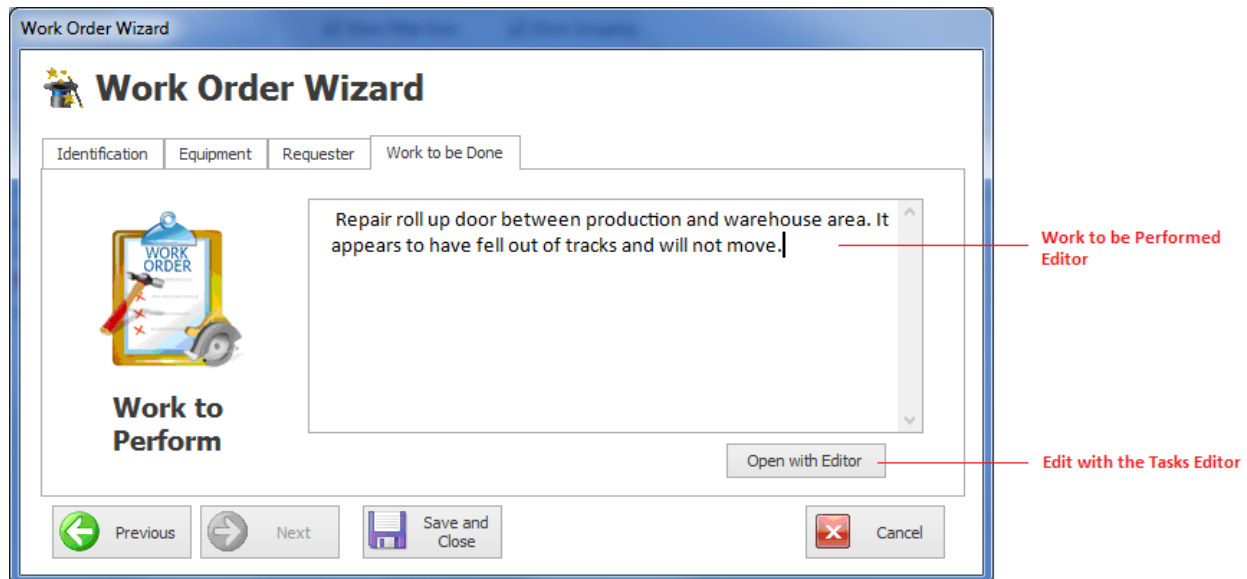
- Move to the **Requester** field and click on the **Select** button.
- From the invoked lookup dialog, select on the employee you want to assign and click on the **Select** button.

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.

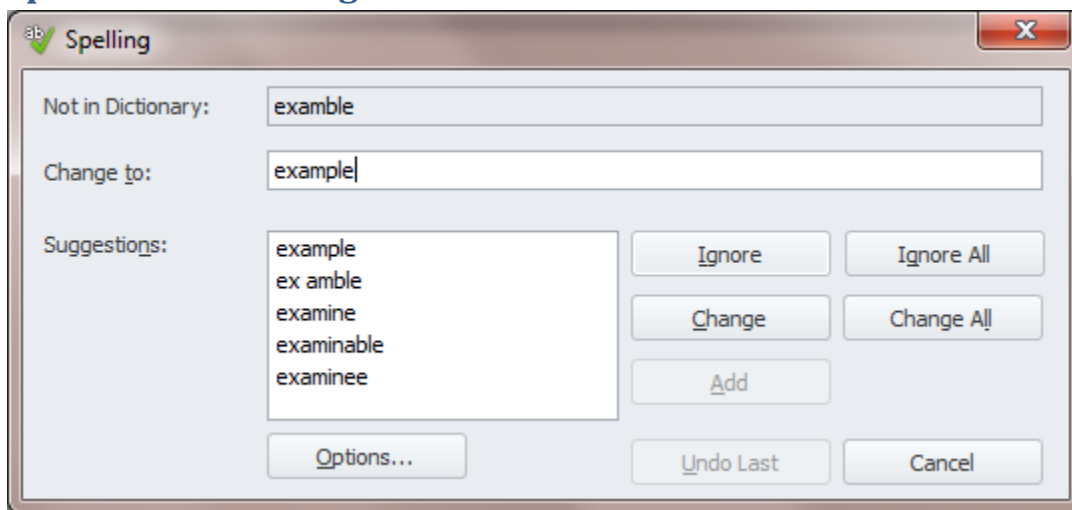
Spell Checker

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.

This is an examble of the a misspelled word.

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).

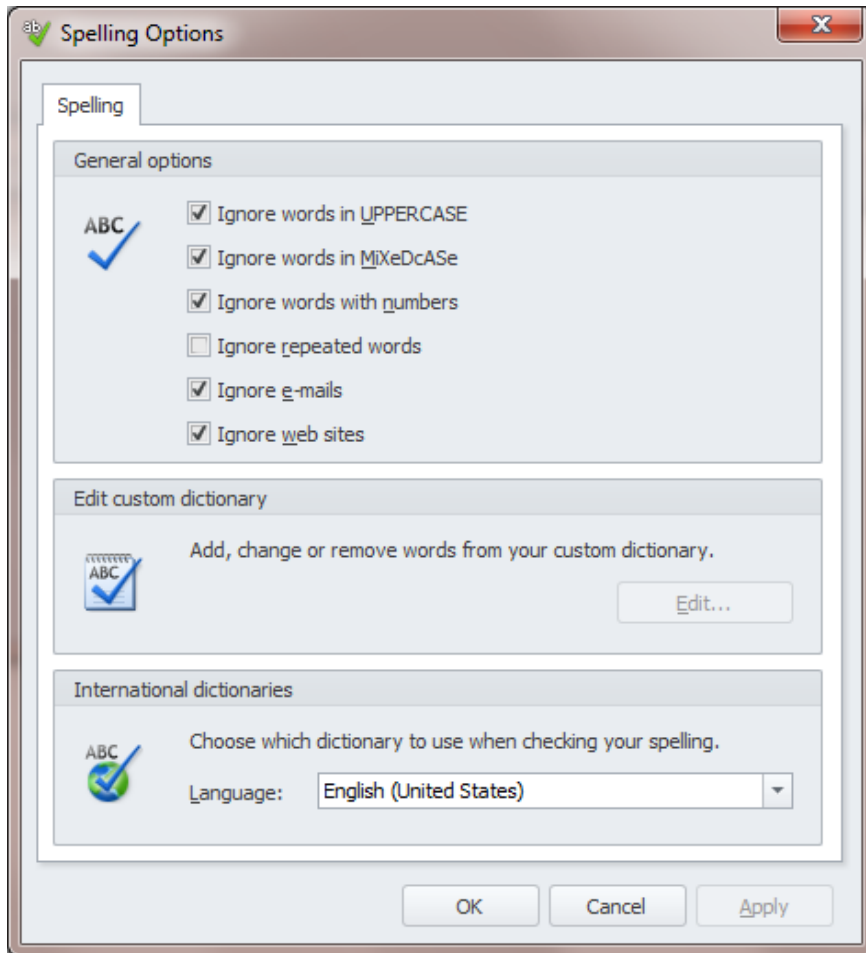
Spell Checker Dialog



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.



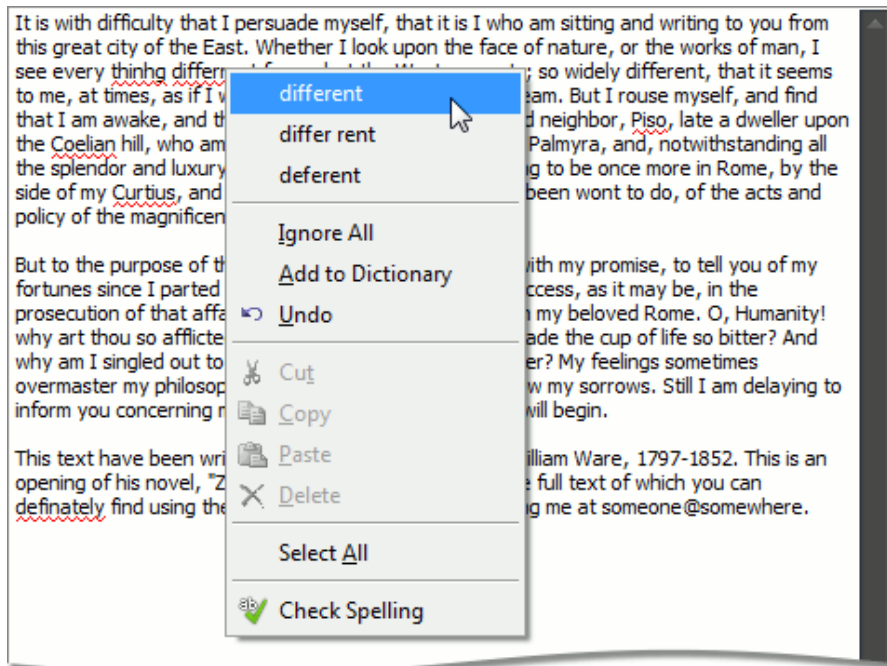
Finding Misspelled Words as you Type

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:

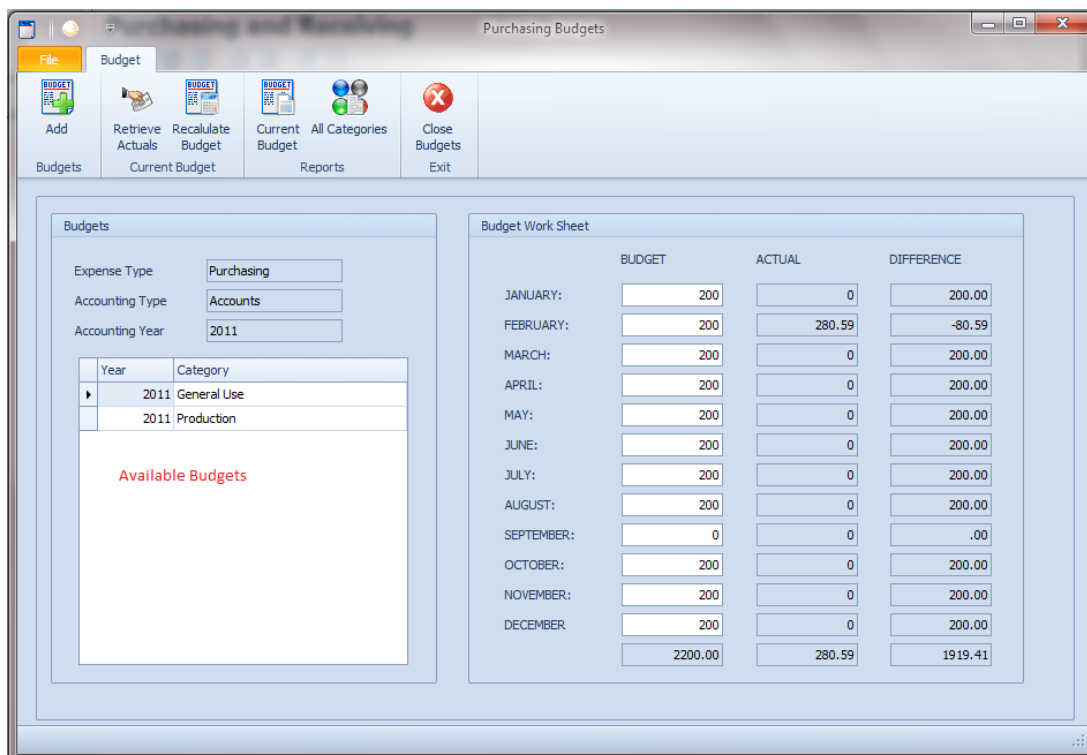
- Replace the word with one of the supplied suggestions.
- Ignore All word with the same misspelling.
- Add the Word to the Dictionary.
- Or invoke the Spell Check Dialog

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



Budgets

With the **Maintenance Coordinator** system you can setup four different types of budgets. The first two are based on purchasing and purchase items accounts or cost centers. The other two are based on maintenance activities, using maintenance accounts or projects.



To setup a budget

The screenshot shows a 'New Budget' dialog box. It contains the following elements:

- Initial Settings:**
 - Expense Type:** A text box containing 'Purchasing'.
 - Accounting Type:** A dropdown menu with 'Accounts' selected. A red arrow labeled 'Account Type Selection' points to this dropdown.
 - Accounting Year:** A dropdown menu with '2011' selected. A red arrow labeled 'Accounting Year' points to this dropdown.
- Budget Category:**
 - An empty text box for category input.
 - A 'Select' button. A red arrow labeled 'Category Selection' points to this button.
- Buttons:** 'Create' (with a green checkmark icon) and 'Cancel' (with a red X icon).

- Move to the *Budget* screen.
- Move to the **Budget** group in the ribbon and click the **Add** option.
- Move to the **Accounting Type** list box and select the appropriate option that you want to create a budget for.
- Move to the **Accounting Year** drop down and select the year you want to base your budget on.
- Move to the **Budget Category** section and click on the Select button found there.
- Choose the appropriate category from the list and click the **Select** button.

Editing and Viewing Budgets

- Move to the *Budget* screen.
- Move to the **Budgets** section and click on the budget you want to work with from those listed.
- Move to the **Budget Work Sheet** section and edit the budget amounts found under the **BUDGET** heading.
- To populate the actual amounts you spend on each month, move to the ribbon and click on the **Retrieve Actuals** option.
- To show totals and differences, move to the ribbon and click on the Recalculate Budget option.

Deleting Budgets

- Move to the *Budget* screen.
- Move to the **Budgets** section and click on the budget you want to work with from those listed.
- Open the **File** menu and select the **Remove** option.
- Answer **Yes** to the prompt.

Security, Users, Databases and Utilities

This chapter deals with security, user accounts, databases and utility modules. Most of features described in this chapter are for users with admin rights.

Logging into the Program



When password protection is active, and when the application first starts up, you'll be greeted with a login screen. This login restricts unauthorized users from gaining access, and also sets defaults setups for authorized users.

To login to the program, please follow these steps:

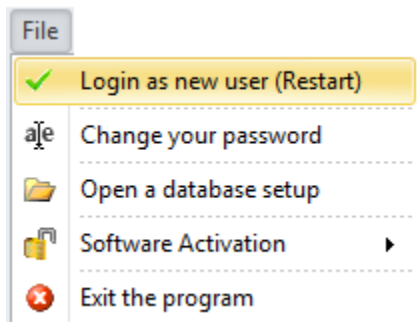
- Start the program in your normal manner.
- When the Login screen appears, move to the User Name text field and type in the name your administrator has issued you.
- Move to the Password text field and type in your assigned password.
- Move to and click on the OK button.

Re-Logging into the Program

While the application is already running, you may wish to re-log into the program. There are a couple of reasons you may wish to do this. One would be to log in as a different user; the other might be to allow different user setup properties to take effect.

To re-log into the program:

- From the Main Menu screen open the File drop down menu and select the Login as New User option.



- Login as you would normally.

Note: When password protection is turned off, this action simply restarts the application.

Lost or Forgotten Passwords

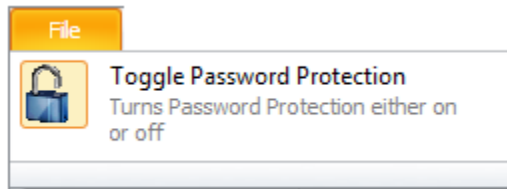
If you have lost or forgotten the password to gain access to the program, we have provided a backdoor password for emergency use. This password should be kept by your administrator and kept in a secured place. This emergency password is the **Software Key** used to unlock the program, and supplied with registered copies of the program.

To login to the program using the emergency password:

- Start the program in your normal manner.
- When the Login screen appears, move to the Password text field and type in the Software Key that was provided you when you purchased the program.
- Click on the OK button.

Turning Password Protection On and Off

To toggle password protection either on or off, you must:



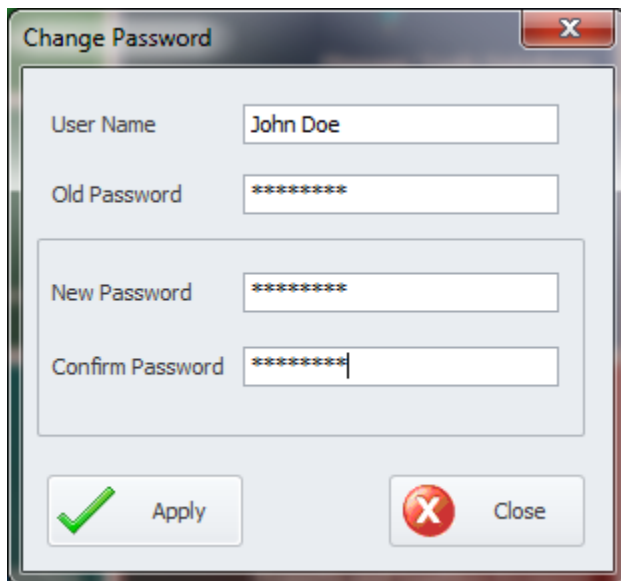
- Log into the program as a user that has Administrator rights.
- From the **Main Menu** screen open the **Admin** drop down menu, and then select **Users Accounts** option.
- From the **Users Accounts** screen click on the **File** menu and select the **Toggle Password Protection** option.
- A Notice should be provided stating the new protection mode.
- Close the **Users Accounts** screen.

The above procedure is used to both turn on and turn off password protection.

Changing Your Own Password

Once a user has logged into the program, and password protection is turned on, these users can change their own individual password to anything they want.

For a user to change their password:



- Log in to the program as normal.
- Open the **File** menu and select the **Change Your Password** option.
- Enter your user name in the **User Name** text box.
- Type in your current or old password in the **Old Password** text box.
- Type in your new password in the **New Password** text box.

- Retype your new password in the **Confirm Password** text box.
- Click on the **Apply** button.
- A message should be displayed confirming the change.

User Accounts

With User Accounts you can create an authorized users list where you can assign what system modules users have access to. Furthermore you can assign various rights pertaining to what a user can do within the modules access has been granted.

Note: User Accounts assigned rights only apply when password protection mode is turned on, also note that password protection is disabled when running a Demo version of the software.

Creating a New User

The screenshot shows the 'User Accounts' application window. The 'File' menu is open, and the 'Add New' option is selected. The 'User Setup' panel on the left contains the following fields:

- User Name:** ADMIN
- Password:** *****
- Personal Database (Connection):** C:\Users\SST-Dell\Documents\MC7 Projects\Personal.mdf
- Linked Employee:** Eliot, Kate
- ☒ **System Administrator**

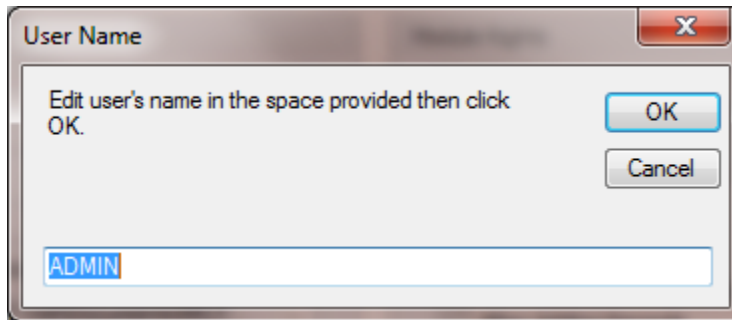
The 'Module Rights' panel on the right shows the 'Maintenance Scheduler' module selected. The 'Assigned Rights' list includes:

- ☒ Administrator Rights
- ☒ Show Access Button
- ☒ Allow Module Access
- ☐ Allow Edits (Not Read Only)
- ☐ Allow Adding Records
- ☒ Allow Deleting Records
- ☐ Allow Printing
- ☒ Allow Reports

Buttons at the bottom of the 'Module Rights' panel include 'Save Module Rights', 'Check All', and 'Uncheck All'. The status bar at the bottom left shows 'ADMIN' and the bottom right shows 'Record 1 of 2'.

To create a new user:

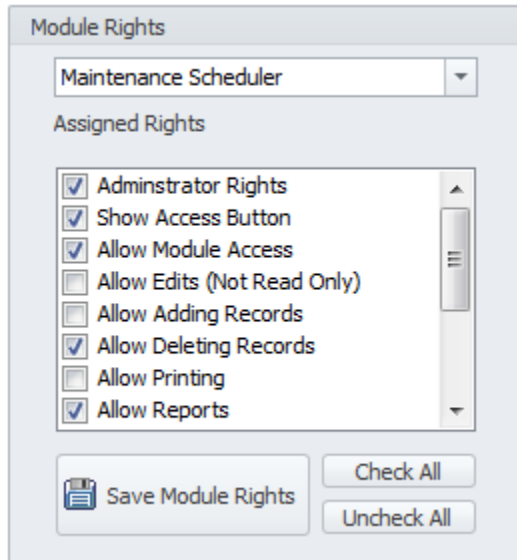
1. Start the program in your normal manner.
2. When the **Login** screen appears, login as a user with administrator rights.
3. From the startup **Main Menu** screen open the **Admin** drop down menu and then select **Users Accounts** option.
4. Click on the **Add New** option in the ribbon or press **Ctrl+N**. This will provide you a new user record to work with.
5. Now click on the ellipsis (...) button to the right of the **User Name** text field.
6. Type in the new user's login name in the box provided and clicking the **OK** button when done.



7. Click on the ellipsis (...) button to the right of the **User Password** text field.
8. Type in the user's password in the box provided, and click on the **OK** button when done.
9. If you want to assign a **Personal Database** to this user:
 - Move to the ribbon and click on the **Personal Database** option.
 - Next you'll be prompted if you want to set or reset the Database connection to use for this user. Click **Yes** to continue.
 - Set up this database connection as outlined in ...
10. If you want to give this user administrator rights, place a checkmark in the **System Administrator** checkbox.
11. Ensure you click **Save Changes** in the ribbon to post changes back to the database.

Setting Individual Module Rights

Each user can be setup with different user rights to each of the different modules. The rights vary somewhat with each module they apply to, and some rights may not apply to certain modules at all.



The following is a summary of some of the most common rights, and these can vary between modules.

- **Administrator Rights** - A check here allows the user rights to everything within the list, including module access. Please note that checking this option overrides all the other module options, checked or not.
- **Show Access Button** – A check here displays the module’s access button on the main screen. This applies even if the user is not granted access rights to the module.
- **Allow Module Access** - A check here allows the user to access or open the given module.
- **Allow Edits (Not Read Only)** – When checked edits are allowed. Unchecked read only mode is effectively applied.
- **Allow Adding Records** - A check here allows the user to add or create new records within the module.
- **Allow Deleting Records** - A check here allows the user to delete or remove records within the module.
- **Allow Printing** – A check here allows the user to print records and other documents within the module.
- **Allow Report** - A check here allows the user to view and create reports from within the given module.
- **Allow Saving Main Lookup** – A check here allows the user to save any modification they may applied to the module’s main lookup grid. Once saved, they will be reapplied the next time the module is opened.
- **Allow Module Setup** – When checked the user is allowed to access and modify a module’s options and settings.
- **Allow Manage Special Fields** – When checked, the user can change user defined fields.

- **Allow Database Routines** - Removing the checkmark here will hide or disable many or all of the module's built in database routines and options.


Again, these are just some of the user right's options. Some modules will have all these rights, some will only have a few of them, and other modules will have completely different ones.

To set individual module rights:

- Start the program in your normal manner.
- When the Login screen appears, login as an administrator.
- From the **Main Menu** screen open the **Admin** drop down menu and then select **Users Accounts** option.
- Use the **data control** to scroll through the records until you locate the user you want to work with. You can also use the grid on the Lookup tab to locate records.
- Move to the **Details** tab and locate the **Module Rights** group.
- Move to the Module drop down list and select the module you want to modify the rights on.
- Move to this **Assigned Rights** list and add or remove checks to each of the available, granting or denying rights
- Click on the **Save Module Rights** button to save the rights for the selected module.
- Repeat the above steps for each module you want to make assignments on.

Deleting Users

To delete a user from using the program:

- Start the program in your normal manner.
- When the Login screen appears, login as an administrator.
- Open the **Admin** drop down menu for the main menu of the program and select the **User Accounts** options.
- Locate the user you wish to delete by using the data control.
- With the user record displayed, move to and click on the **delete** button  in the quick access bar.

Creating New Databases

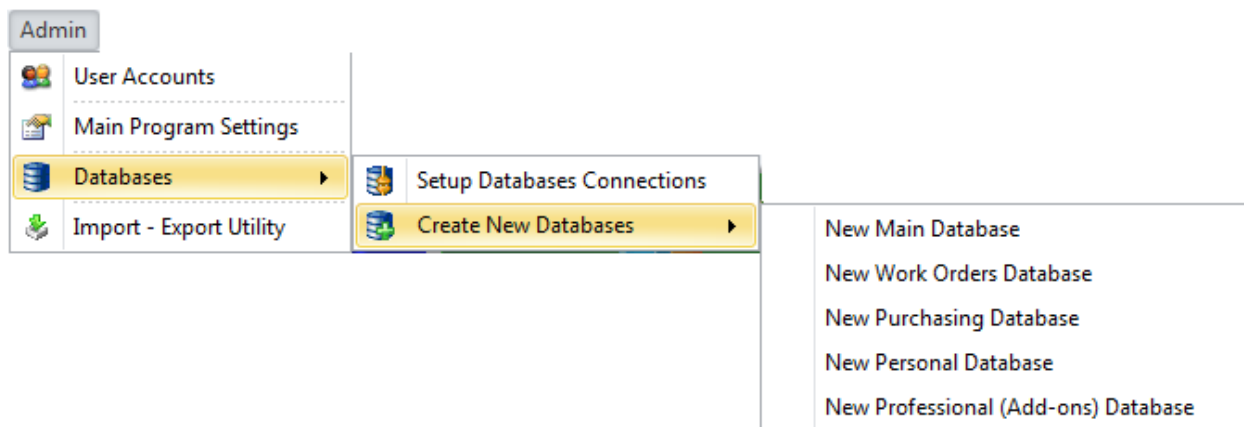
The Maintenance Coordinator program allows you to create new databases for use with the program. This feature can prove to be useful when you want to clear data from the program, but not destroy it. It will also prove useful when you have multiple users and want a different Personal Database assigned to each of your users.

You can create the following databases using this program:

- **Main Database** - This database holds the main information or tables dealing with **Maintenance 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.
- **Purchasing and Receiving Database** – This database maintain information for Purchasing and Receiving support, purchase orders, purchase requisitions and blanket purchase orders.
- **Personal Manager Database** – This database maintains information on personal items. Personal Log, Personal Scheduler, Personal Contacts and Journal information.
- **Professional Add-Ons Database** – This database supports some of the add-on features and their data storage. Currently supported are Issues and Safety Management information.

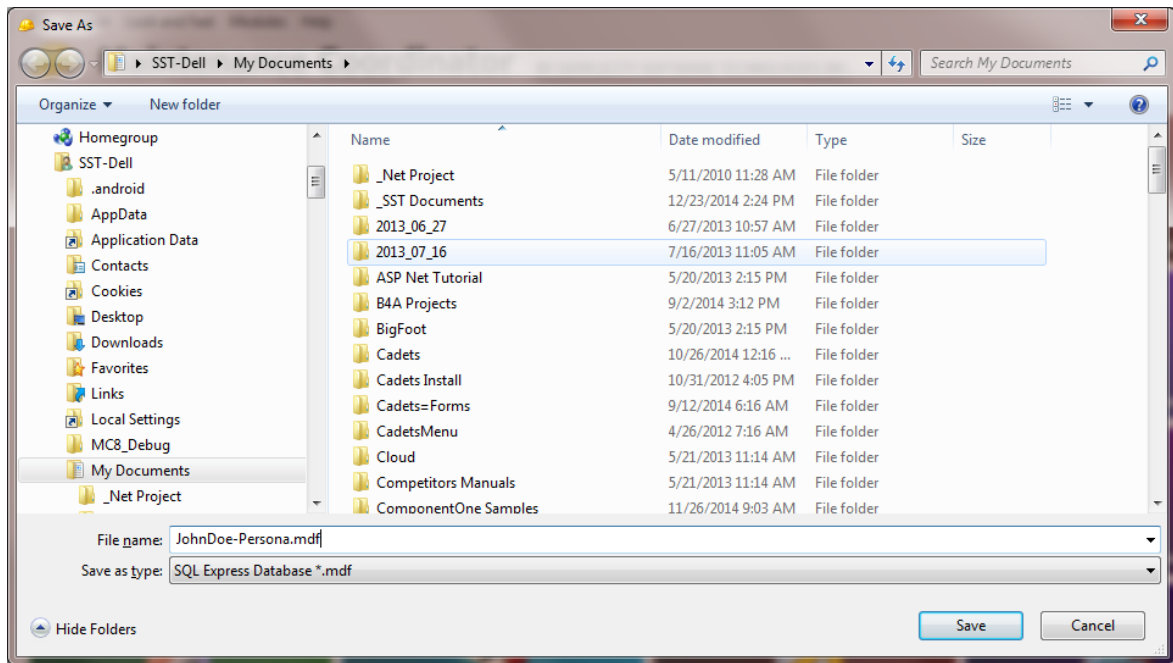
To create a new database, please follow these steps:

- Start the program in your normal manner.
- Log in as an administrator.
- Open the **Admin** menu and expand the **Databases** sub-menu.



- Expand the **Create New Database** pop-out menu.
- Select the type of database you want create. Options include:
 - **New Main Database**
 - **New Work Orders Database**
 - **New Purchasing Database**
 - **New Personal Database**
 - **New Professional (Add-ons) Database**

- Once the database type is selected, the Save As dialog will appear.



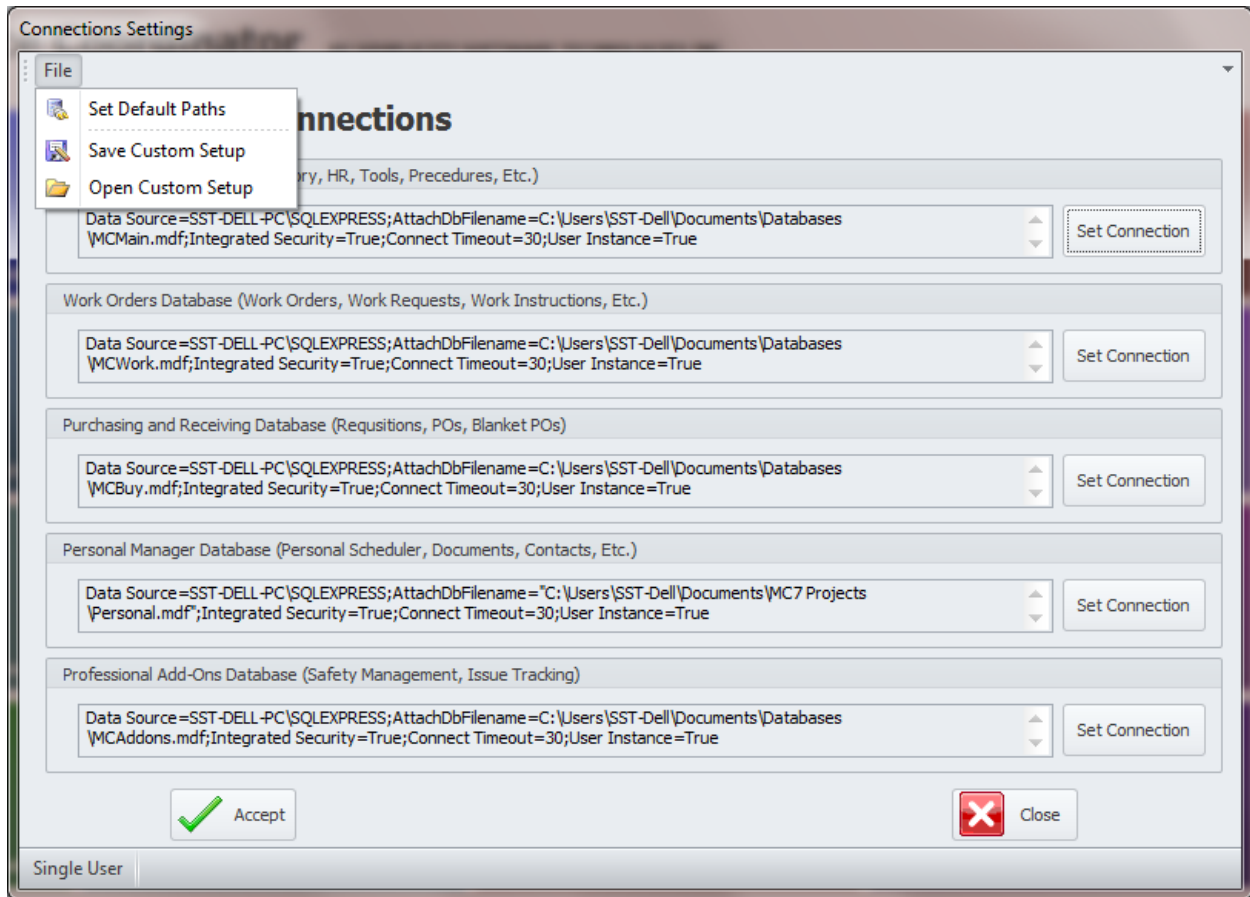
- Move to the **Save In** drop down list box and setup the folder or directory you wish to save your new database in.
- Move to the **File Name** text box and enter the name you want this database to have. Examples here could be John, Mark or Lynn for personal databases.
- Click the **Save** button.
- A message should be displayed saying the operation was successful.

Setting up Database Connections

Please refer to the [Setting up Database Connections](#) section of the [Getting Started](#) chapter for the procedures for setting up your database connections.

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.

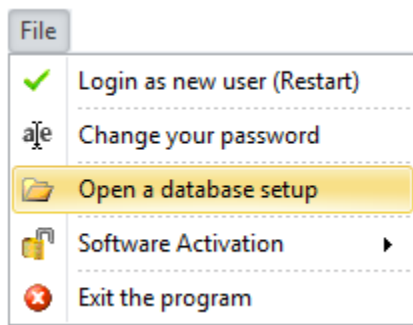
To open a saved setup

- 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 **Maintenance 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.

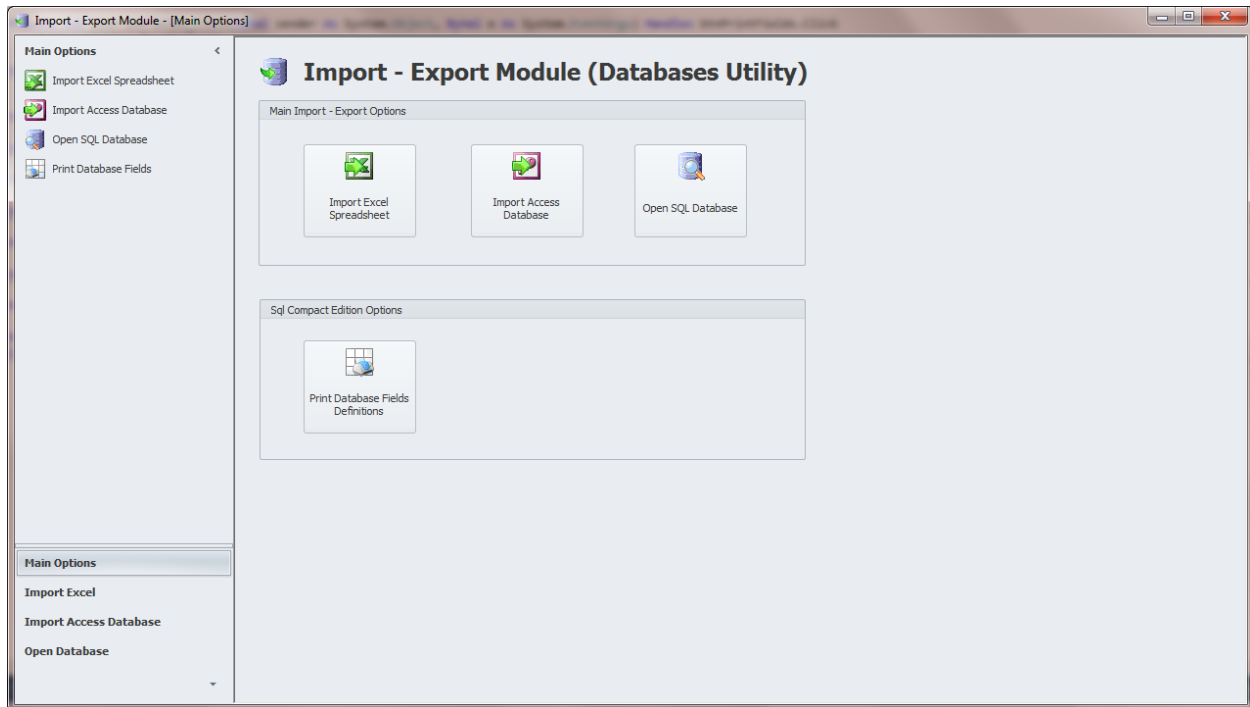
Networking Your Databases

If you purchased a site or network license you can install or copy your databases to a shared, network drive. This way multiple users can access the information stored there at the same time.

To install and use the databases on a network please refer to the [Installing for Network Use](#) section of the [Getting Started](#) chapter.

Import – Export Utility

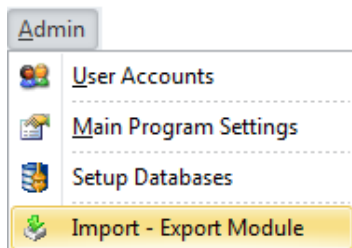
The **Import-Export Utility** was designed to help our clients import information or data from existing software packages to ours. You can import from two of the most popular file formats. These include Microsoft Access databases and Microsoft Excel spreadsheets. Other options include the ability to open and edit information in SQL Server databases, and print the table structures of SQL Databases.



We don't expect that you'll be able to import all information straight from one software package to another as each company has their own way of doing things. Finding straight one-to-one relationships for all information is very unlikely, but we do believe that you should be able to import a great majority of the information. This will save you a great deal of time as you won't have input everything from scratch.

Accessing the Import – Export Utility

To access the **Import – Export Utility**:

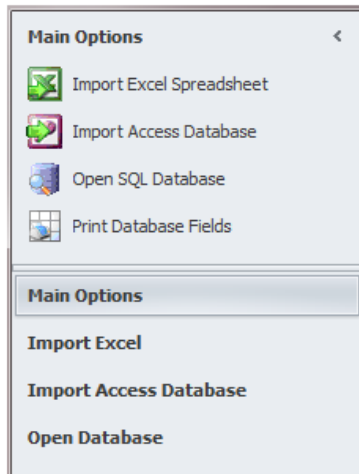


- From the main menu of the system, locate and click on the **Admin** drop down menu.
- Click on the **Import – Export Module** option.

Navigating Import - Export Utility

The following outlines the possible options that can be used in the navigation between the components of this utility.

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



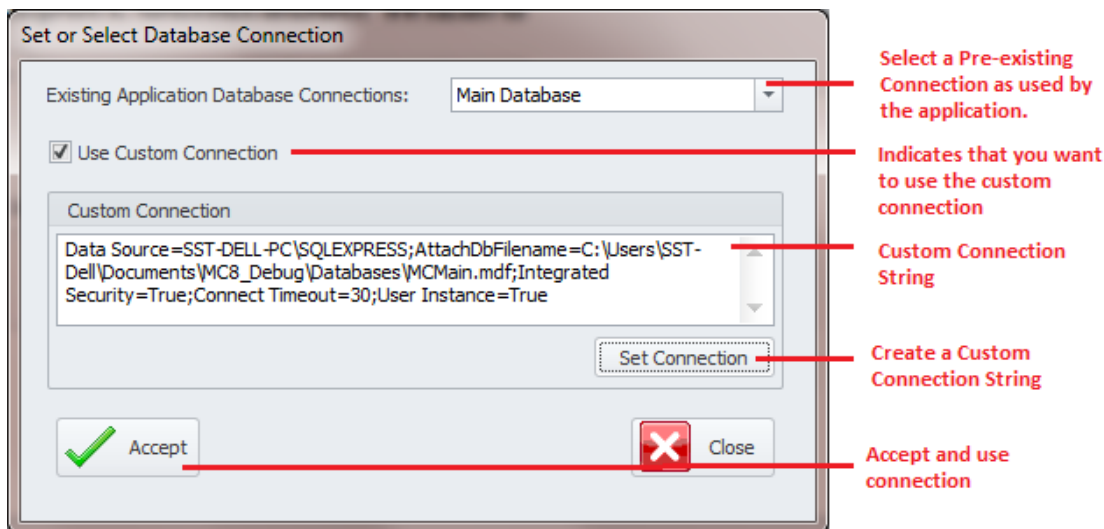
- Click on a group within the **Navigation Options** Bar to branch to that component. The groups are the larger of the available items shown, with larger text and icons.
- Once a group is expanded, you can click on one of the available options to active that option or feature.

You can also use the **Main Option** menu screen to branch to an available feature by clicking on the appropriate button.

Connecting to a Database

Every operation provided by this utility requires that you connect to a database and the procedure to do this will be outlined here.

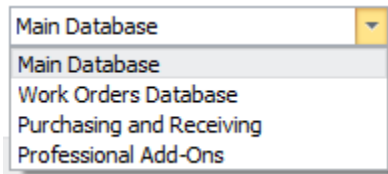
The following illustrates the **Set or Select Database Connection** dialog that we use to provide database connection properties:



To Use an Existing Connection

- Move to drop down list adjacent to the **Existing Application Database Connections** and select the database connection you want to use. These connections are the same ones that are

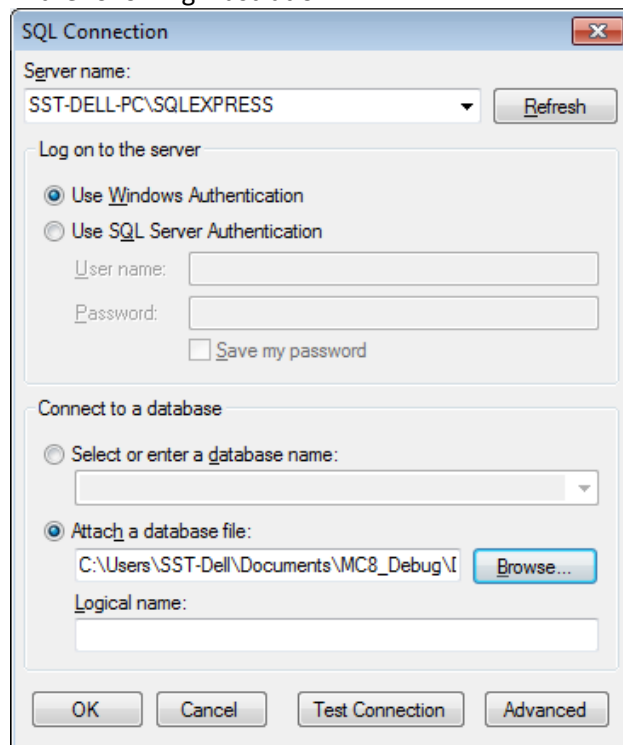
currently setup for main program use.



- Ensure that the **Use Custom Connection** checkmark is not checked.
- Click on the **Accept** button.

To Use a Custom Connection

- Move to and check the **Use Custom Connection** checkbox.
- Click on the **Set Connection** button. This will invoke the **SQL Connection** dialog screen as shown in the following illustration:



- Move to the **Server 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 probably 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.

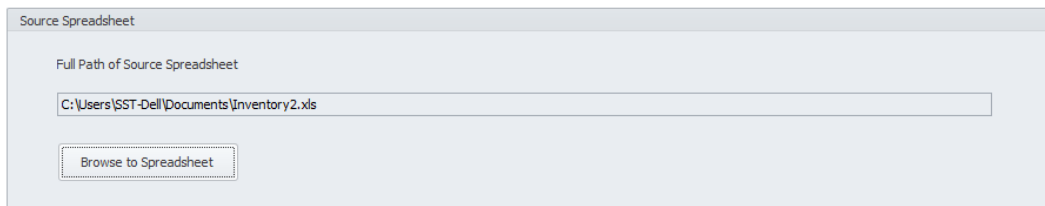
- Move to the drop down found here and either select or enter the name of the database you are connecting to.
- **SQL Express:** (Attached database file)
 - Check the **Attach a database file** option.
 - Either use the **Browse** button here to select the database file, or type in the full path to the 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 **Accept** button.

Import Excel Spreadsheet

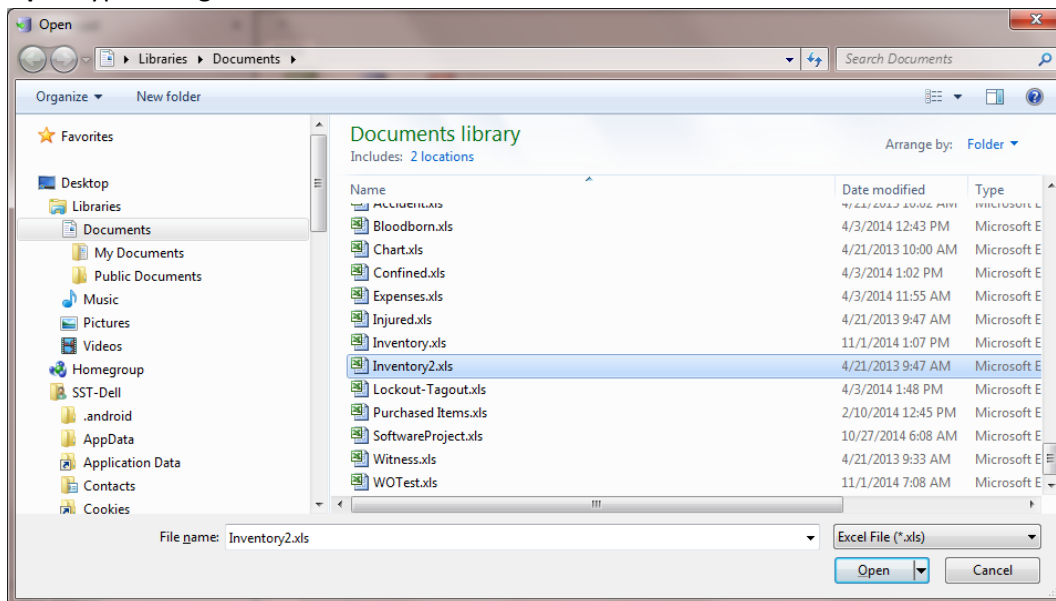
The **Import Excel Spreadsheet** function allows you to import data from an Excel spreadsheet and save the information into a SQL Server database.

To import a spreadsheet:

- Click on the **Import Excel Spreadsheet** button in the main menu or in the navigation bar.
- Move to **Source Spreadsheet** group and click on the **Browse to Spreadsheet** button.



- Locate and open the spreadsheet you want to use as the data source by using this familiar **File Open** type dialog.



- Move to the **Destination Database** group and click on the **Connect to Database** button.

- Connect to your destination database as described in the [Connecting to a Database](#) section of this chapter.
- Move to the **Table to Copy to** drop down list, and select the database table you want to import to. All the tables of the connected database should be listed here, and you can only import to a single table per import operation.

- Move to and click on the **Setup Spreadsheet Fields** tab to move to that tab. On this tab you'll setup spreadsheet columns to database columns (fields) relationships.
- Move to an unassigned column of the spreadsheet and click in the header to select the column.

Manufacturer	PartNo
WestCo, Mfg	LG-0085 Mens
Allen-Brady	800T-77990
WestCo, Mfg	LG-0085 Mens

An assigned column (points to the 'Manufacturer' header)

A selected and unassigned column (points to the 'PartNo' header)

- Move to the **Database Columns or Fields** drop down list and select the field you want to assign to the selected spreadsheet column. This assignment indicates the database field the spreadsheet column will be imported to.

Every field or database column assigned to the selected database table will be available in this list.

- Repeat assigning database columns to spreadsheet columns for each field you want to import. Non-assigned spreadsheet columns will be ignored and not imported. Also note that you cannot use a database column assignment for multiple spreadsheet columns.

- Once you have made all the columns to columns relationships, move to and click on the **Copy Data** tab.
- Click on the **Copy Data** button and wait for the import to complete.
- When the message appears, you're done with the import/copy process.

Clear a Column Field Assignment

To clear a database field assigned to a spreadsheet column:

- Select the spreadsheet column you want to remove the assignment from.
- Click on the **Clear Column Field** button in the ribbon.
- When prompted about the removal, click on the **Yes** button.

Insert a New Blank Column into the Spreadsheet

To insert a new blank column into the spreadsheet:

- Select a column in the document just after the insertion point of the new column.
- Move to the ribbon and click on the **Insert** option.
- From the drop down, select the **Insert Column to the Left** option.

Insert a New Blank Row into the Spreadsheet

To insert a new blank row into the spreadsheet:

- Select a row in the document just below the insertion point of the new row.
- Move to the ribbon and click on the **Insert** option.
- From the drop down, select the **Insert Row Above** option.

Delete Rows(s) and Column(s) in the Spreadsheet

To remove columns or rows from the spreadsheet:

- Select the column(s) or row(s) you wish to delete by clicking its heading.
- Do one of the following:
 - In the **Cells** group click the **Delete** button and select the **Remove Column(s)** or **Remove Row(s)** item from the drop-down list.

Format Data

You can format the data in the spreadsheet by:

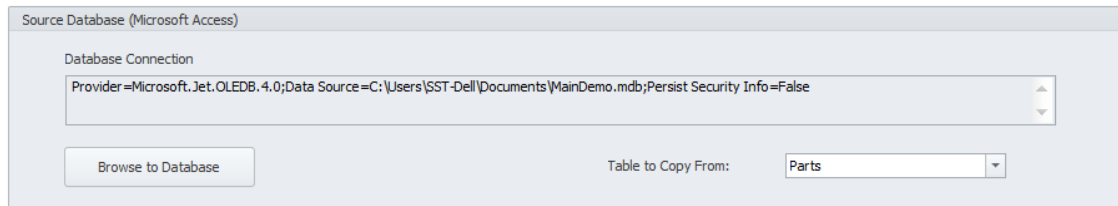
- Select the cells you want to format the data on.
- Move to the **Data Format** group and select the format option that you want to apply. Options include:
 - Format Text
 - Format Number
 - Format Date

Import an Access Database

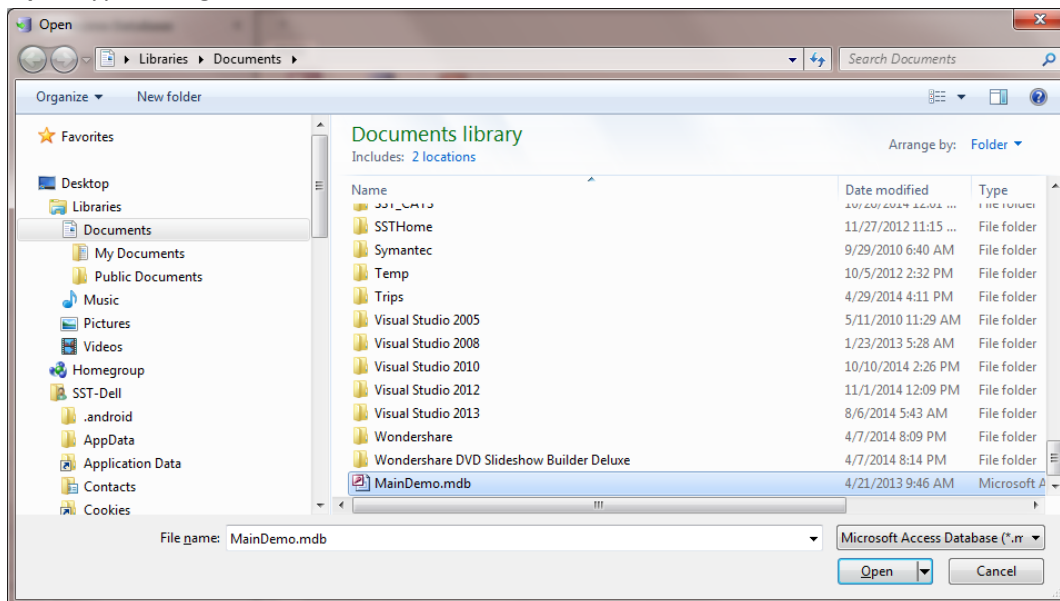
The **Import Access Database** function allows you to copy data from a Microsoft Access database to a Microsoft SQL Server Database. You first select and open the source database and a table to copy from, and then select the destination database and the table to copy to. Next you setup the field relationships of the two databases, then copy.

To import an Access Database:

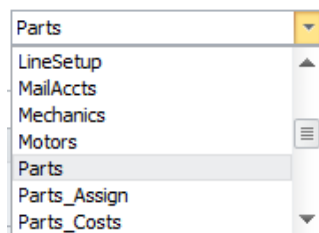
- Click on the **Import Access Database** button in the main menu or in the navigation bar.
- Move to the **Databases and Tables** tab. Move to the **Source Database (Microsoft Access)** group and click on the **Browse to Database** button.



- Locate and open the database file you want to use as the data source by using this familiar **File Open** type dialog.



- Move to the **Table to Copy From** drop down list and select the database table to use as the source table. All tables in the selected database should be listed here.



- Move to the **Destination Database** group and click on the **Connect to Database** button.

- Connect to your destination database as described in the [Connecting to a Database](#) section of this chapter.
- Move to the **Table to Copy to** drop down list, and select the database table you want to import to. All the tables of the connected database should be listed here, and you can only import to a single table per import operation.

- Move to and click on the **Fields to Copy (Setup)** tab to move to that tab. On this tab you'll setup source columns to destination columns (fields) relationships.
- Move to an unassigned column of the source database and click in the header to select the column.

Reference		
PartID	Description	Ma
TUBI00001	1/4 Tubing Tee	Ea
TUBI00002	1/4 Tubing 90 degn	Ea
BRAS00001	1/4 Brass Ball Valv	Ea

An Assigned Column

An Unassigned and Selected Column

- Move to the **Database Columns or Fields** drop down list and select the field you want to assign to the selected source database column. This assignment indicates the database field the source database column will be imported to. Every field or database column assigned to the selected destination database table will be available in this list.

- Repeat assigning destination database columns to source columns for each field you want to import. Non-assigned source columns will be ignored and not imported. Also note that you cannot use a database column assignment for multiple source columns.
- Once you have made all the columns to columns relationships, move to and click on the **Copy Data** tab.
- Click on the **Copy Data** button and wait for the import to complete.
- When the message appears, you're done with the import/copy process.

Clear a Column Field Assignment

To clear a database field assigned to a spreadsheet column:

- Select the source database column you want to remove the assignment from.
- Click on the **Clear Column Field** button in the ribbon.
- When prompted about the removal, click on the **Yes** button.

Insert a New Blank Column into the Source Data Grid

To insert a new blank column into the data grid:

- Select a column in the document just after the insertion point of the new column.
- Move to the ribbon and click on the **Insert** option.
- From the drop down, select the **Insert Column to the Left** option.

Insert a New Blank Row into the Source Data Grid

To insert a new blank row into the data grid:

- Select a row in the document just below the insertion point of the new row.
- Move to the ribbon and click on the **Insert** option.
- From the drop down, select the **Insert Row Above** option.

Delete Rows(s) and Column(s) in the Spreadsheet

To remove columns or rows from the data grid:

- Select the column(s) or row(s) you wish to delete by clicking its heading.
- Do one of the following:
 - In the **Cells** group click the **Delete** button and select the **Remove Column(s)** or **Remove Row(s)** item from the drop-down list.

Open (View) SQL Database

The **Open SQL Database** function allows you to open a database and one of its tables. Once opened information can be edited directly within the grid, or the data can be exported to an Excel compatible file. **WARNING:** This is a connected database.

To open a SQL Database:

- Click on the **Open SQL Database** button in the main menu or in the navigation bar.
- Move to **SQL Database** group and click on the **Connect to Database** button.

SQL Database

Database Connection

Data Source=SST-DELL-PC\SQLEXPRESS;AttachDbFilename=C:\Users\SST-Dell\Documents\MCS8_Debug\Databases\MCMMain.mdf;Integrated Security=True;Connect Timeout=30;User Instance=True

Connect to Database

Table to Open: Inventory

- Connect to the database as described in the [Connecting to a Database](#) section of this chapter.
- Move to the **Table to Open** drop down list, and select the table that you want to open. All the tables of the connected database will be listed here.

Parts

LineSetup

MailAccts

Mechanics

Motors

Parts

Parts_Assign

Parts_Costs

- Move to and click on the **View Database** tab to view and or edit the records of the selected table.

Home Database

Export Data to Excel Export

Save Changes Data

Select All Selections

Delete Selected Record(s)

Select Database View Database

UniqueID	Reference	Description	Manufacturer	PartNo	Picture	Location	StorageLocation	StorageAisle	StorageBin
00000000-0000-...	LATE00001	Latex Gloves	WestCo, Mfg	LG-0085 Mens			Safety Supplies ...		
725cabd8-15e7-...	DRUM00001	Drum Switch	Allen-Brady	800T-77990		Main Storeroom	Electrical Area		
d42f9049-de3a-...	LATE00001	Latex Gloves	WestCo Mfg, Co	LG-0085 Mens		Main Storeroom	Safety Supplies ...		
a356350f-837f-...	LEAT00001	Leather Gloves	WestCo Mfg, Co	LG-0067 Mens		Main Storeroom	Safety Supplies ...		
fc5f0b4f-6bb9-4...	SAFE00001	Safety Goggles	Safe-R-Us			Storeroom			
c697a58e-1436-...	SPRA00001	Spray Lubricant	Northwest Easy ...	WD-440					

- Click on **Save Changes** in the ribbon to apply any changes you have made.

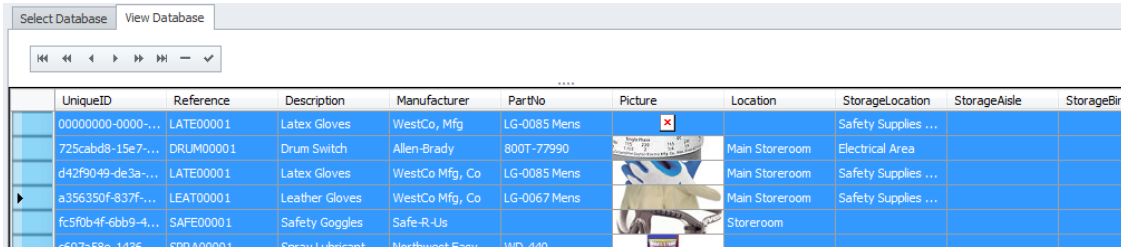
Editing a Cells Contents

To edit the text or contents of a record:

- Move to the grid and double click in the cell you want to edit the contents on. Double clicking invokes edit mode.
- Type or edit the contents of the cell as wanted.
- Move to the ribbon and click on the **Save Changes** button to post changes back to the database.

To select all records in the Opened Table

- Move to the ribbon and select the **Select All** option.



UniqueID	Reference	Description	Manufacturer	PartNo	Picture	Location	StorageLocation	StorageAisle	StorageBin
00000000-0000-...	LATE00001	Latex Gloves	WestCo, Mfg	LG-0085 Mens		Main Storeroom	Safety Supplies ...		
725cabd8-15e7-...	DRUM00001	Drum Switch	Allen-Brady	800T-77990		Main Storeroom	Electrical Area		
d42f9049-de3a-...	LATE00001	Latex Gloves	WestCo Mfg, Co	LG-0085 Mens		Main Storeroom	Safety Supplies ...		
a356350f-837f-...	LEAT00001	Leather Gloves	WestCo Mfg, Co	LG-0067 Mens		Main Storeroom	Safety Supplies ...		
fc5f0b4f-6bb9-4...	SAFE00001	Safety Goggles	Safe-R-Us			Storeroom			

To Delete All Selected records in the Opened Table

- Select the rows you want to delete.
- Move to the ribbon and select the **Delete Selected Records** option.
- When prompted about the deletion, click the **Yes** button.

Export Table to Excel

To export the opened table to Excel:

- Move to the ribbon and click on the **Export Data to Excel** option. This action will invoke a new spreadsheet view of the data.
- Move to the ribbon and again click, **Export to Excel**. This will invoke the **Save As** dialog screen.
- From the invoked **Save As** dialog, browse to and select the folder you wish to save the file in.
- Move to the **File name** text box and type in a name for the file.
- Click on the **Save** button.
- Click on the **Close** button.

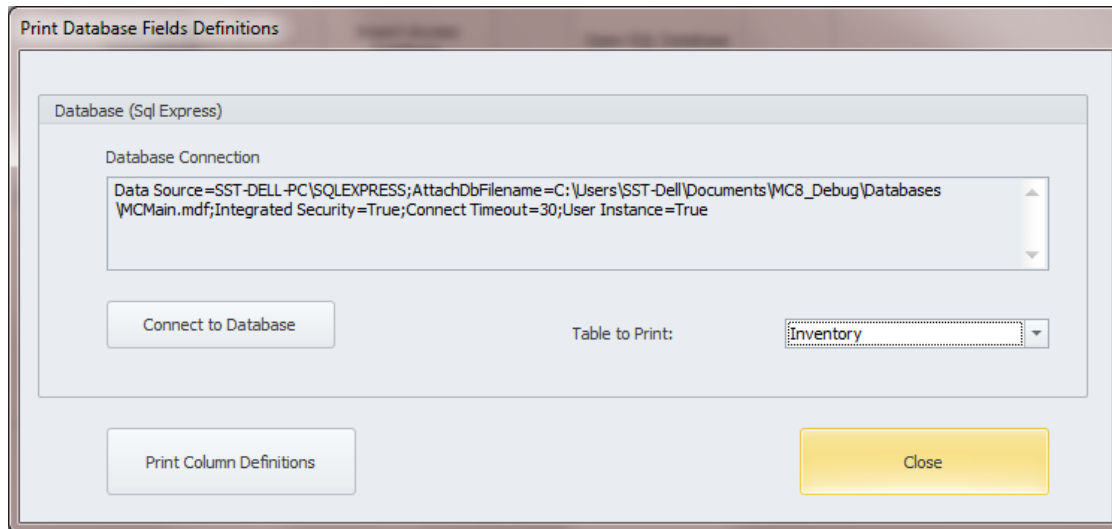
Printing Database Field Definitions

You can print the field definitions for tables in your database. This information can come in handy for such things as creating records.

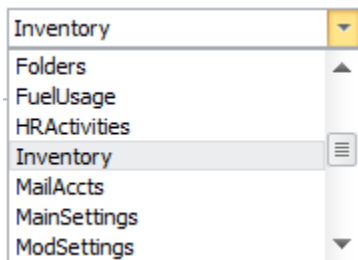
To print field definitions:

- Click on the **Print Database Field Definitions** button in the main menu or in the navigation bar.

- From the invoked **Print Database Field Definitions** dialog move to the **Database Connection** group and click on the **Connect to Database** option.



- Connect to the database as described in the [Connecting to a Database](#) section of this chapter.
- Move to the **Table to Print** drop down list, and select the database table you want to print information on. All the tables of the connected database should be listed here.



- Click on the **Print Column Definitions** button. This will show a print preview of the table's fields or columns.

Inventory		
UniqueID	System.Guid (key)	16
Reference	System.String	30
Description	System.String	40
Manufacturer	System.String	40
PartNo	System.String	40
Picture	System.Byte[]	2147483647
Location	System.String	40
StorageLocation	System.String	40
StorageAisle	System.String	30
StorageBin	System.String	30
Classification	System.String	30
EquipmentName	System.String	40

- Click **Close** when done.

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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.

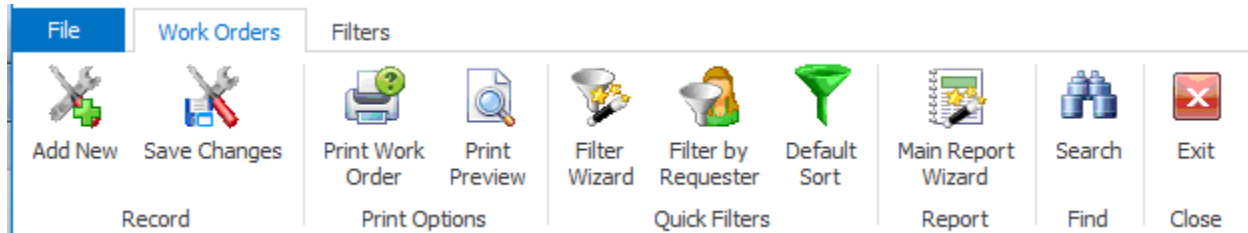
You also want to use the **Maintenance Scheduler** module to add items, such as Classification assignments, Projects and the like to the database for use with both of these modules. You can setup and customize the work order print settings with the **Maintenance Scheduler** module, along with the custom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

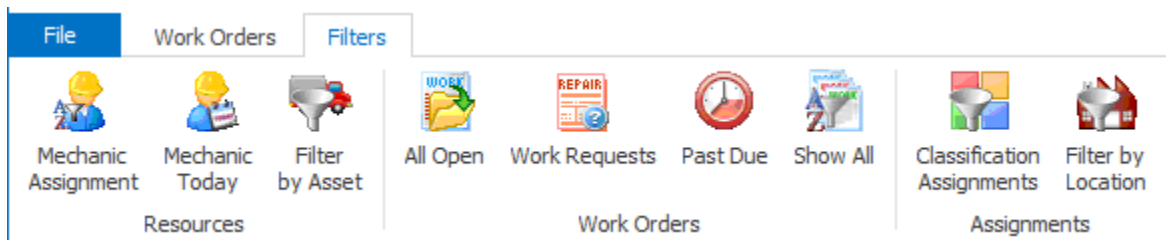
WORK ORDERS TAB



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:

Barcode Scan and Lookup

Show/Hide Filter Row

Show/Hide Grouping

Grouping Area

Filtering Row

Database Records or Rows

Priority Column
Work Order Status

	Task ID	Subject	Start Date	End Date	% Done	Location	Asset Name	Requester
1101-1	Repair sink in ladies r...	4/22/2013	4/30/2013	60%	Support Equi...		Eliot, Gary	
1101--3	Trash compactor not ...	4/15/2013	4/30/2013	0%	Support Equi...		Albright, Ge...	
1110-11	Air Compressor Mont...	12/3/2012	12/7/2012	0%	Support Equi...	600 PSI High Pr...	Eliot, Gary	
1401-9	Undog the blocked dr...	6/25/2014	6/27/2014	70%				
1405-6	Work Order from Issu...	6/3/2014	6/18/2014	50%		High Pressure Ai...	Eliot, Kate	

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:

The screenshot shows a form titled "Work Order Identification" with the following fields and annotations:

- Subject:** A text field containing "Repair sink in ladies room". A red line points to it with the annotation "Brief description of work order".
- Task ID:** A text field containing "1101-1". A red line points to it with the annotation "Check if ID is Unique". A "Check" button is located to the right of this field.
- Location:** A dropdown menu showing "Support Equipment Room". A red line points to it with the annotation "Task Location Assignment".
- Created:** A text field showing "1/7/2011 8:51 AM". A red line points to it with the annotation "Date and Time of Creation".
- A red line points to the "Task ID" field with the annotation "Task Identification".

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.

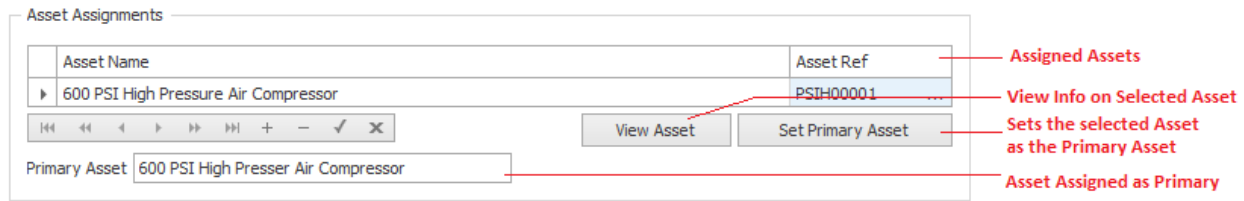
Created

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:

The screenshot shows a 'Work Order Settings' form with three main sections: 'Task Type', 'Priority', and 'Est. Down Time'. The 'Task Type' section has a dropdown menu currently showing 'Standard Work Order'. The 'Priority' section has a radio button next to 'Normal' and a dropdown arrow. The 'Est. Down Time' section has two input fields, one for 'Hrs' (showing '0') and one for 'Mins' (showing '0'). Red lines with labels point to each of these three sections: 'Work Order Type Assignment' points to the Task Type dropdown, 'Priority Assignment' points to the Priority radio button/dropdown, and 'Expected Duration of Work Order' points to the Hrs and Mins input fields.

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:

The screenshot shows a form titled "Work Requested By" with the following fields and buttons:

- Requester:** A text box containing "Eliot, Gary" and a "Select" button. An annotation "Select from Database" points to the "Select" button.
- Email:** A text box containing "geliot@aol.com" and an "Open" button. An annotation "Open with Email" points to the "Open" button.
- Phone:** An empty text box. An annotation "Requester Information" points to this field.
- Send Completion Notice:** A checkbox. An annotation "Allow Completion Notice" points to this checkbox.

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.

The screenshot shows the "Work To Be Performed" editor interface. It features a table with three rows of instructions:

Clean and mop the restroom. Empty the trash cans, restock paper towels, protective seat covers and toilet paper. Note any corrective actions that may be needed.
Replace the broken toilet and dispose of it. Clean up after yourself.
Using an auger, unclog the blocked drain. Test to ensure proper flow.

Below the table is the text "<< Main Editor Area >>". To the right of the table are two buttons: "Open with Editor" and "Auto Subject". Annotations include:

- "Edit the 'Work to Be Performed' tasks with the Editor" pointing to the "Open with Editor" button.
- "Auto Subject Button" pointing to the "Auto Subject" button.

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:

Work Order Scheduling

Start Date	6/3/2014	Start Time	8:00 AM
End Date	6/18/2014	End Time	5:00 PM

Scheduled Start Date and Time

Scheduled End Date and Time

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:

Assignments

Assigned To	Murray, Fred	...
Manager	Martin, Scott	...
Classification	General Repairs	▼
Project		▼
Safety Instructions	Standard Safety Instructions	...

Select Assignments

Assignments

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:

Work Order Status

Status In Progress ▼

% Completed 50

Send Status To Requester

Status Indicator

Email Status Notice

Record Percentage Done

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:

The screenshot shows a form titled "Work Order Completion Information" with the following fields and buttons:

- Date Completed**: A date field showing "6/25/2014" with a dropdown arrow.
- Completed By**: A text field showing "Murray, Fred" with a "Select from Database" button.
- Inspected By**: A text field showing "Eliot, Kate" with a "Select from Database" button.
- Meter Value**: A text field showing "5698" with a dropdown arrow.
- Actual Down Time**: Two fields for "Hrs" (showing "2") and "Mins" (showing "14").
- Buttons**: "Get Current" and "Save To History".

Red lines connect the following labels to the corresponding elements in the form:

- Completion Date** points to the Date Completed field.
- Completed By** points to the Completed By field.
- Select from Database** points to the buttons next to Completed By and Inspected By.
- Retreive Current Value** points to the Get Current button.
- Inspected By** points to the Inspected By field.
- Actual Time Spent** points to the Actual Down Time fields.
- Save Summary to Asset's History Log** points to the Save To History button.
- Equipment Meter Value** points to the Meter Value field.

- **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.

Completion Comments and Delays

Undugged the drain

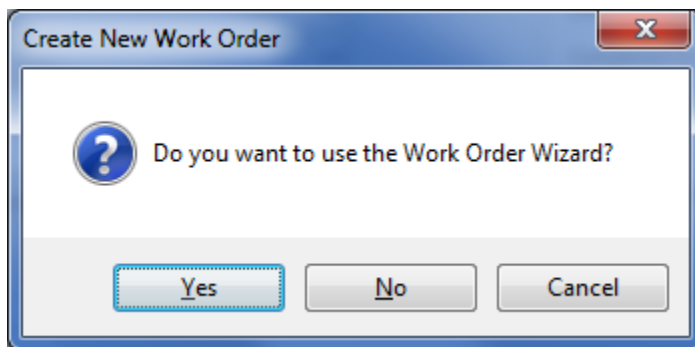
<< TEXT EDITOR AREA >>

Allows the use of the Editor to record this information.

Open with 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

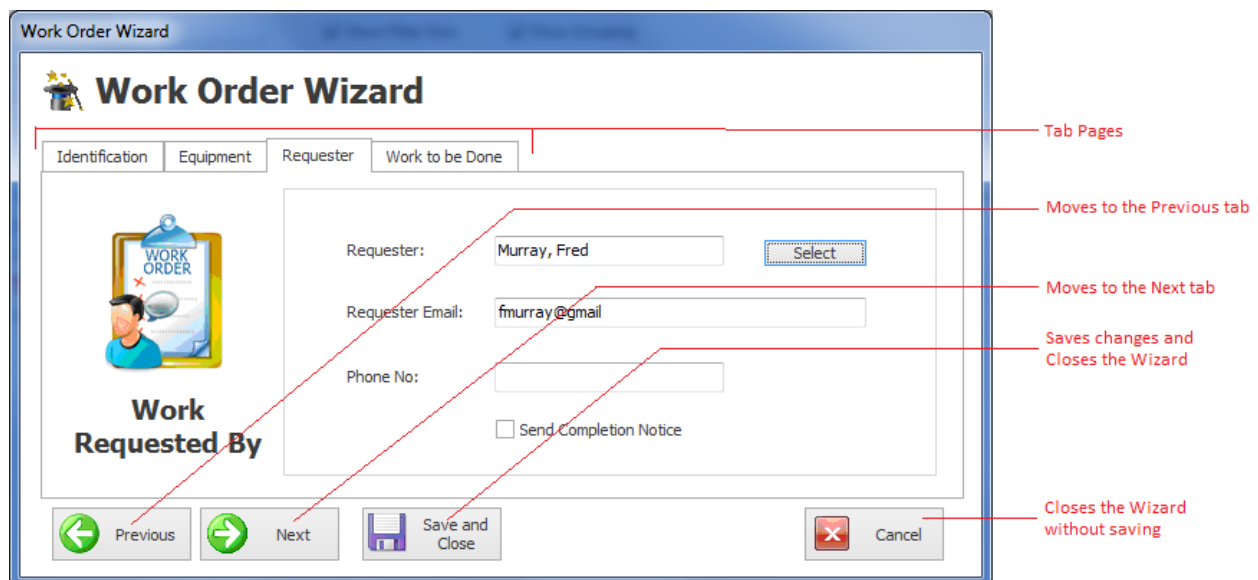
To print the current work order:

- 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

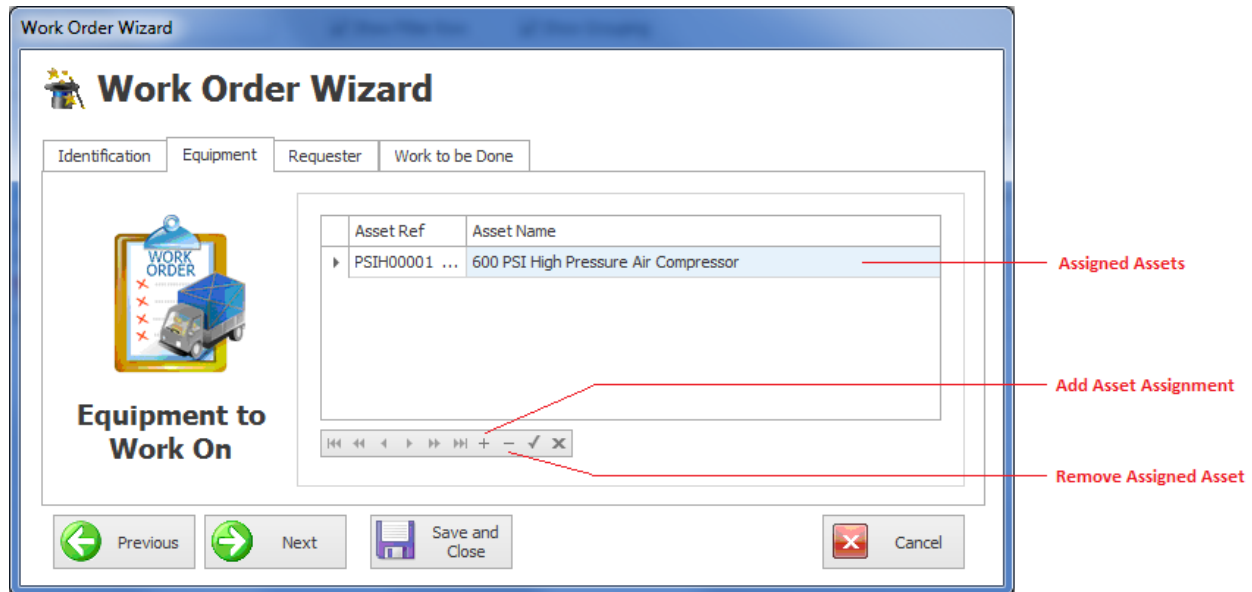
The following illustration shows the elements on this tab:

The screenshot shows the 'Work Order Wizard' window with the 'Identification' tab selected. The window has a title bar 'Work Order Wizard' and a toolbar with 'Previous', 'Next', 'Save and Close', and 'Cancel' buttons. The main area contains a 'Work Order Identification' section with a clipboard icon. The form fields are: 'Subject' (text box with 'Repair roll up door between production and warehouse area'), 'Task ID' (text box with '1406-10' and a 'Check' button), 'Location' (dropdown menu with 'Main Facility'), and 'Task Type' (dropdown menu with 'Standard Work Order'). Red lines with text labels point to these fields: 'Subject' is labeled 'Brief description of work to be performed', 'Task ID' is labeled 'Task Identification Number', the 'Check' button is labeled 'Verify if Task ID is Unique', 'Location' is labeled 'Location at which the work will be performed', and 'Task Type' is labeled 'Work Order Type Assignment'.

- **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:



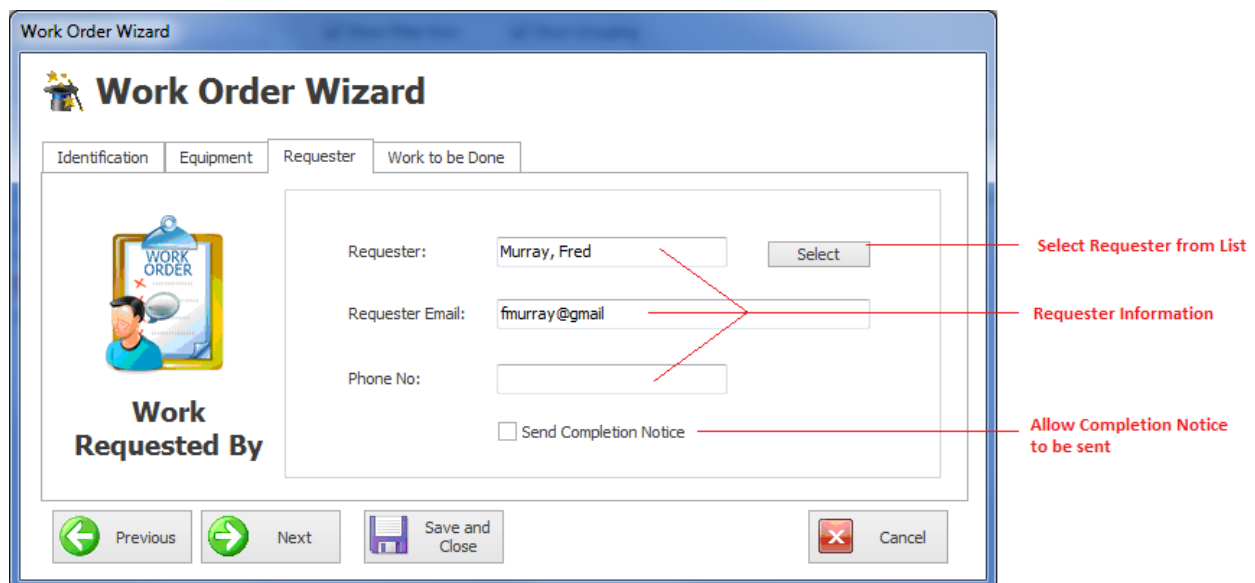
To assign an asset to the work order:

- 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:

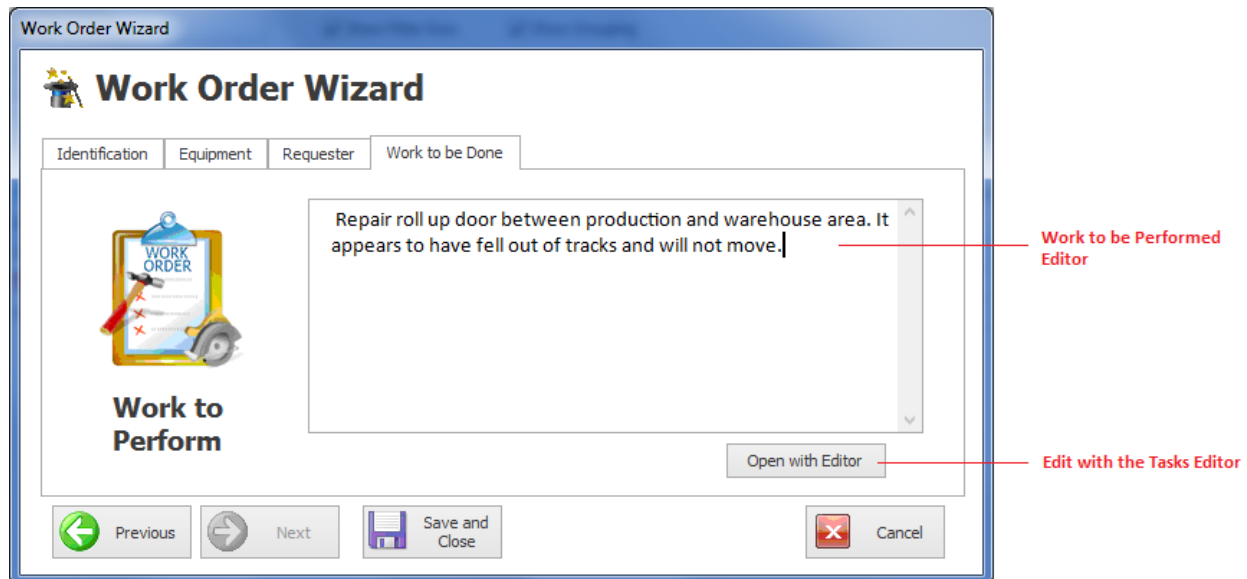
- Move to the **Requester** field and click on the **Select** button.
- From the invoked lookup dialog, select on the employee you want to assign and click on the **Select** button.

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 on 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:

Report Wizard

Types and Status Assignments Dates and Sorting

Assignments

Requester:	Use All	Select	Use All
Classifications:	Use All	Select	Use All
Locations:	Use All	Select	Use All
Projects:	Use All	Select	Use All
Assets/Equipment:	Use All	Select	Use All
Mechanic:	Use All	Select	Use All

Criteria or Matching Assignments Selection

Clears Assignments

Previous Next Accept Cancel

- 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:

The screenshot shows the 'Report Wizard' window with the 'Dates and Sorting' tab selected. The window has three tabs: 'Types and Status', 'Assignments', and 'Dates and Sorting'. The 'Dates and Sorting' tab contains the following elements:

- Date Range Selection based on Scheduled Start:**
 - Start Date:** A text box with '6/27/2014' and a dropdown arrow.
 - End Date:** A text box with '6/27/2014' and a dropdown arrow.
 - ☐ **Use All Dates**
 - ☐ **Use Completion Dates**
- Order By:** A section containing:
 - Sort By:** A dropdown menu currently showing 'Subject'.

At the bottom of the window are four buttons: 'Previous' (with a left arrow), 'Next' (with a right arrow), 'Accept' (with a green checkmark), and 'Cancel' (with a red X). Red lines with labels point to specific elements:

- Date Range Criteria:** Points to the 'Start Date' and 'End Date' fields.
- Type of Dates to Use:** Points to the 'Use All Dates' and 'Use Completion Dates' checkboxes.
- Show All (Ignore Dates):** Points to the 'Use All Dates' checkbox.
- Sort By Field:** Points to the 'Sort By' dropdown menu.

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	AS SIGNMENTS	
Start Date: 12/3/2012	Asset/Equipment: 600 PSI High Pressure 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	Manufacturer: 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	AS SIGNMENTS	
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	Manufacturer:	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	AS SIGNMENTS	

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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**.

Company Logo (points to gear icon)

Company Information (points to company details)

Work Order 1101--2 (points to Task ID)

Barcode Image (points to barcode)

Subject (points to Subject field)

Work Order Type (points to Work Order Type field)

Current Status (points to Current Status field)

SCHEDULING AND DETAILS (points to Scheduling and Primary Assignments section)

Primary Asset Information (points to Primary Asset Information section)

Primary Asset Property Information (points to Primary Asset Property Information section)

Safety Instructions (points to Safety Instructions section)

Work Instructions (points to Work Instructions section)

Part Usage Recording (points to Part Usage Recording section)

Recording of Completion Steps (points to Recording of Completion Steps section)

Sign-Offs (points to Sign-Offs section)

Page 1 of 2

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

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, pneumatic, 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 electrical power has been removed from 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 manufacture's specified torque.
	Clean and vacuum any exposed surfaces.
	Replace cabinet filters

RECORD ALL PARTS USED

RECORD STEPS TAKEN TO COMPLETE WORK ORDER

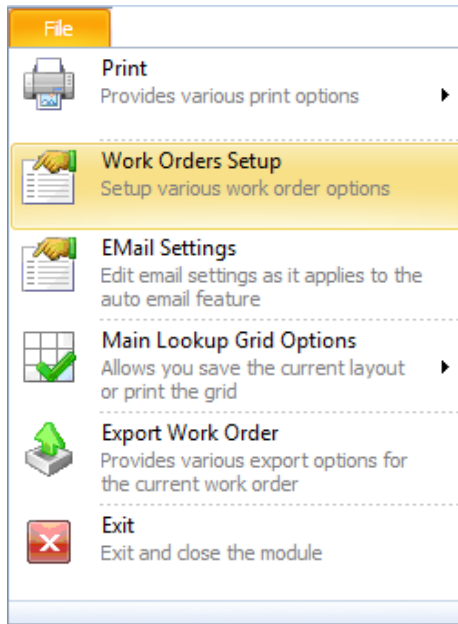
COMPLETION SIGN-OFFS

Completed By:		Date:	
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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: *yy**mm* – *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 orders 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.

The screenshot shows the 'Work Orders Settings' dialog box with the 'General' tab selected. The dialog is divided into 'Global Settings' and 'Local Settings' sections. Red lines with text annotations point to various fields and checkboxes:

- Global Settings:**
 - Next Work Order Number:** A text box containing '17'. Annotation: 'Sets the Next Sequential Number'.
 - Days in advance to generate work orders:** A text box containing '30'. Annotation: 'Sets the days in advance to generate new work orders'.
 - Work Orders Types - Document Control No:** A text box containing 'WO90001'. Annotation: 'ISO Document Control Numbers'.
 - PM Types - Document Control No:** A text box containing 'PM90002'.
 - Do Not Generate New Work Orders for Weekends:** A checked checkbox. Annotation: 'Sets the Generation of Weekend Work Orders'.
 - Generate New Work Orders for In-Service Equipment Only:** An unchecked checkbox. Annotation: 'Sets the Generation of In-Service Assets'.
 - Default Times:** Two dropdown menus. The 'Start' dropdown is set to '8:00 AM' and the 'End' dropdown is set to '5:00 PM'. Annotation: 'Default Scheduled Start and End Times'.
- Local Settings:**
 - Allow the Automatic Printing of Work Orders:** A checked checkbox. Annotation: 'Allows Printing Work Orders at Startup'.
 - Allow Work Order Reminder Settings:** An unchecked checkbox. Annotation: 'Allows Work Order Reminders'.
 - Allow Past Due Notification of Work Orders:** A checked checkbox. Annotation: 'Allows Overdue Notification'.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

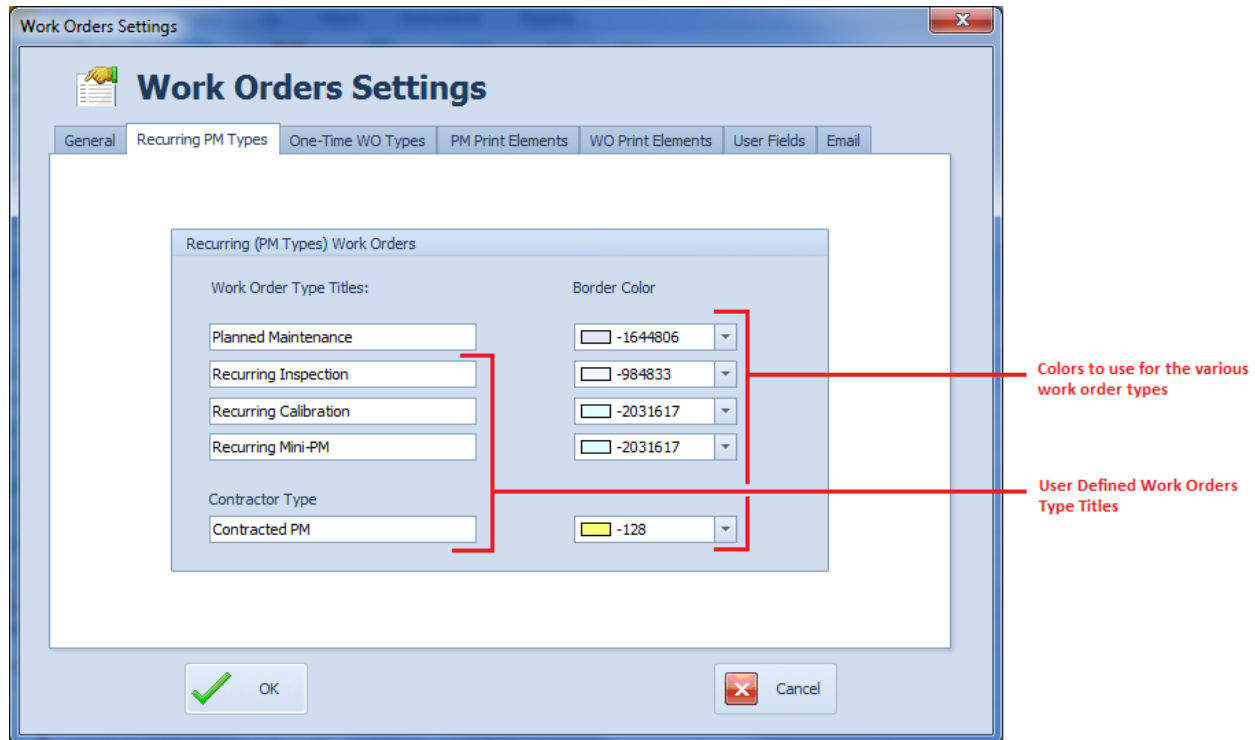
LOCAL SETTINGS

- **Allow the Automatic Printing of Work Orders** - Selecting this option allows a notice to popup when you first open the program. This will notify you about work orders due today, and gives you the option to print them from the pop up.
- **Allow Work Order Reminders** - Allows the pop ups reminding of upcoming work orders.
- **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

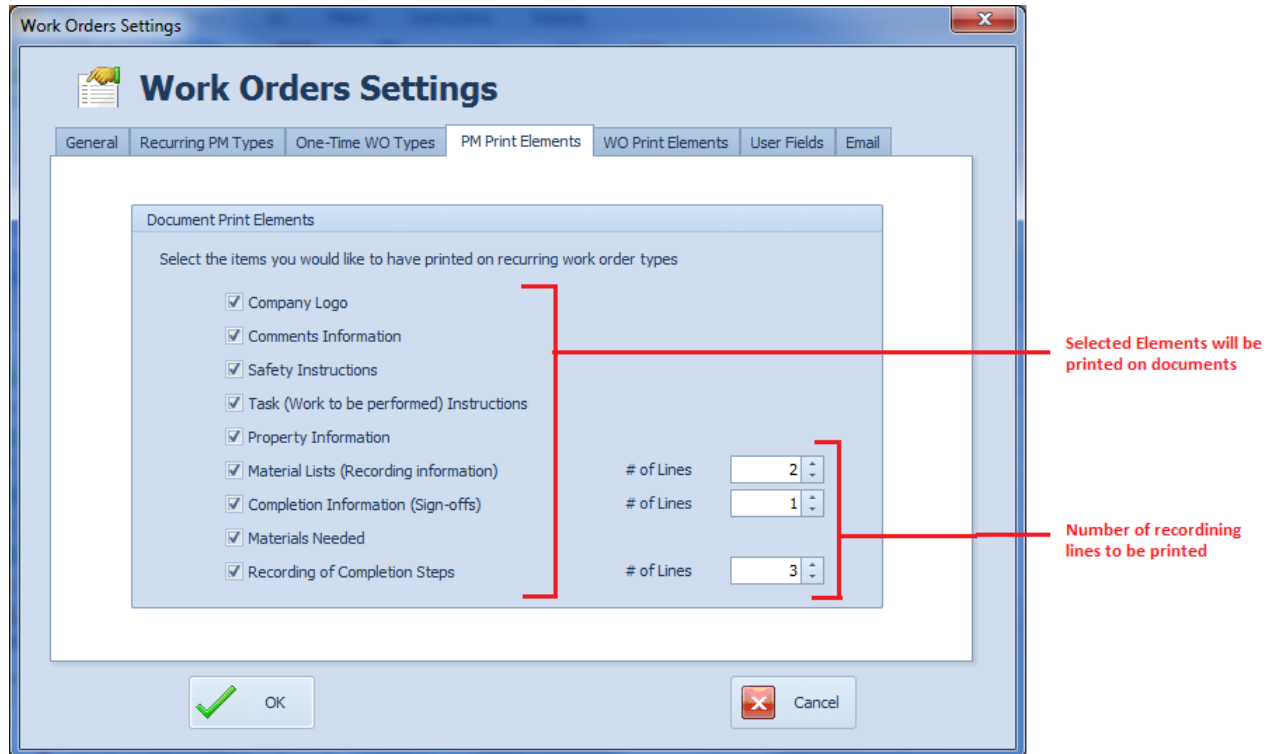
- Edit the displayed title to your liking.

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.

The screenshot shows the 'Work Orders Settings' dialog box with the 'WO Print Elements' tab selected. The 'Document Print Elements' section contains a list of items to be printed, each with a checked checkbox. To the right of this list are three spin boxes labeled '# of Lines'. Red lines and text annotations highlight the configuration: a bracket on the left indicates that all listed elements will be printed, and a bracket on the right indicates the number of lines for each element.

Document Print Elements	# of Lines
<input checked="" type="checkbox"/> Company Logo	3
<input checked="" type="checkbox"/> Work to be Performed	2
<input checked="" type="checkbox"/> Safety Instructions	
<input checked="" type="checkbox"/> Property Information	
<input checked="" type="checkbox"/> Material Lists (Recording information)	
<input checked="" type="checkbox"/> Completion Information (Sign-offs)	
<input checked="" type="checkbox"/> Materials Needed	
<input checked="" type="checkbox"/> Recording of Completion Steps	4

Selected Elements will be printed on documents

Number of recording lines to be printed

User Fields Tab

The screenshot shows the 'Work Orders Settings' dialog box with the 'User Fields' tab selected. The 'Work Orders User Defined Fields' section has a checkbox for 'Use User Defined Fields' which is unchecked. Below it are two text boxes for 'Default Caption for User Field #1' (containing 'Building') and 'Default Caption for User Fields #2' (containing 'Room'). The 'PM Comments Section' also has a checkbox for 'Use Custom Comments' which is unchecked, and a text box for 'Custom Title:' (containing 'Comments').

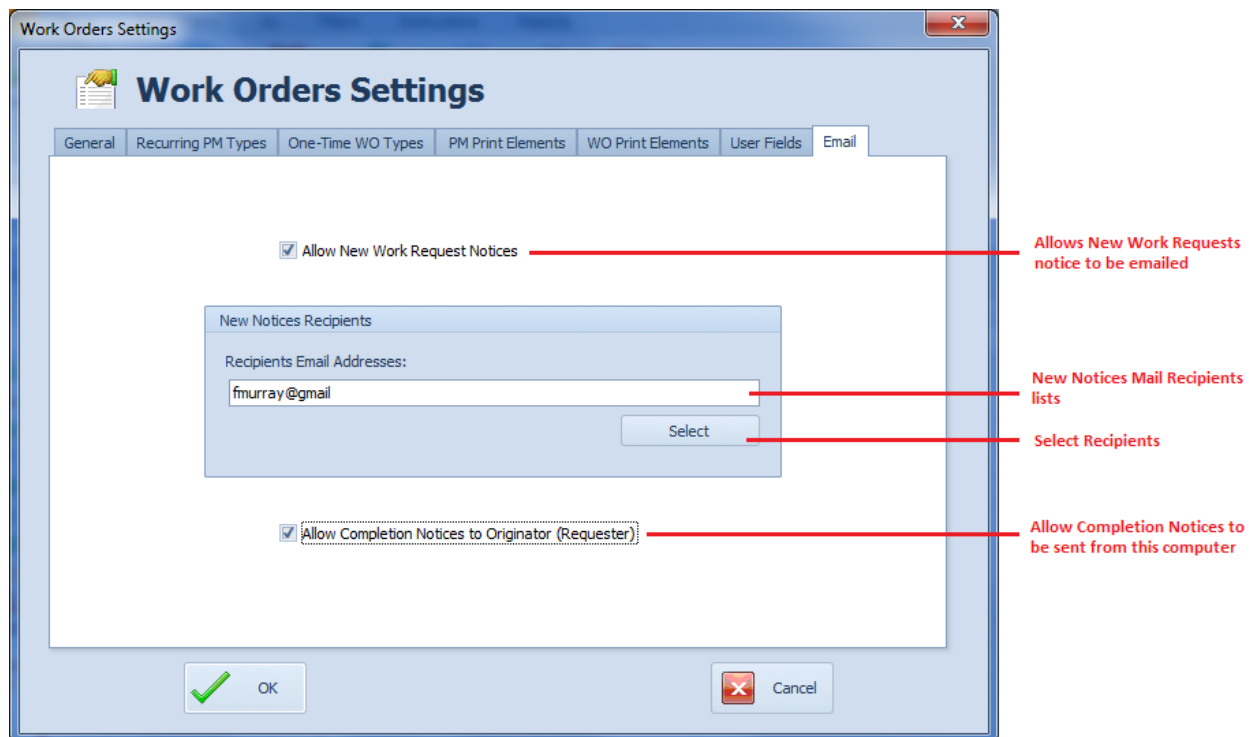
This tab allows you to setup the following elements:

- 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.

Email Tab

The **Email** tab allows you to enable *New Work Orders Notices* to be sent, who to send these notices to, and enable the use of *Completion Notices*.



To enable a notice to be sent as new work orders are entered into the system:

- Check the **Allow New Work Request Notices** check box.

To add mail recipients for use with the New Requests routine:

- Move to and add the email addresses in the **Recipients Email Addresses** text box, Separate multiple addresses with a semi-colon (;).
- You can also use the lookup routine to add recipients by clicking on the **Select** button found in this area.

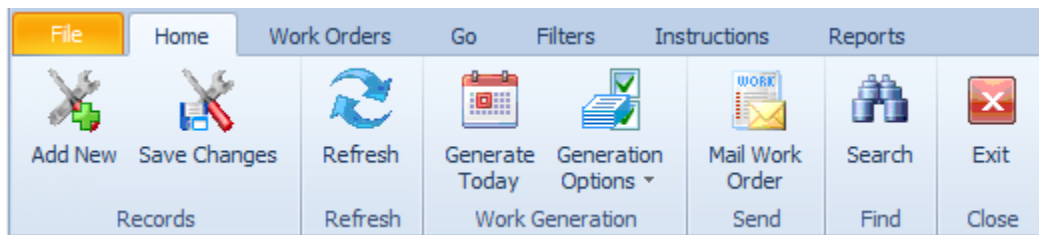
To allow Completion Notice to be sent to the Requester:

- Check the **Allow Completion Notice to Originator** check box.

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.

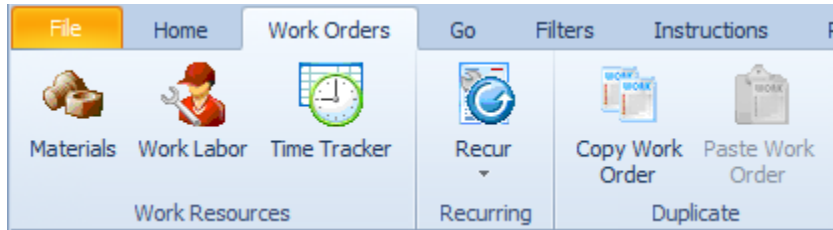
HOME TAB



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 within 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.
- **Mail Work Order** – Opens the Email Composer with current work order as an attachment.
- **Search** – Invokes the search routine on the Lookup Grid as explained in the [Common Features](#) chapter.
- **Exit** – Close the Maintenance Scheduler module.

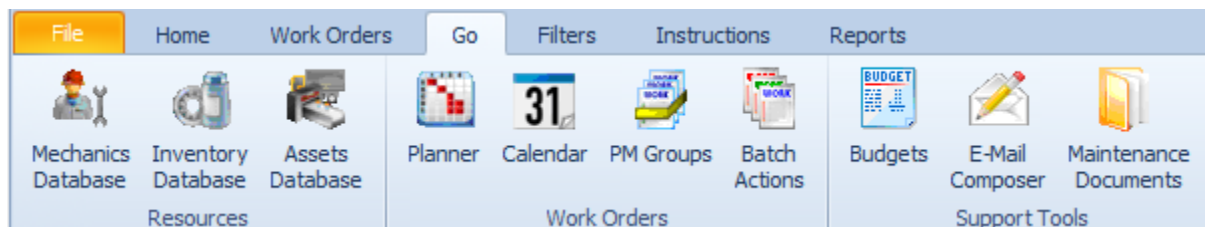
WORK ORDERS TAB



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

- **Materials** – Allows you to assign and track inventory items needed and used for the work order completion.
- **Work Labor** – Allows you to assign mechanics' estimated and actual times needed in the work order completion.
- **Time Tracker** – Allows the use of a stop watch type function to record a mechanics time working on a work order. Also allows for the creation of *Time Card* type reports.
- **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.

GO TAB

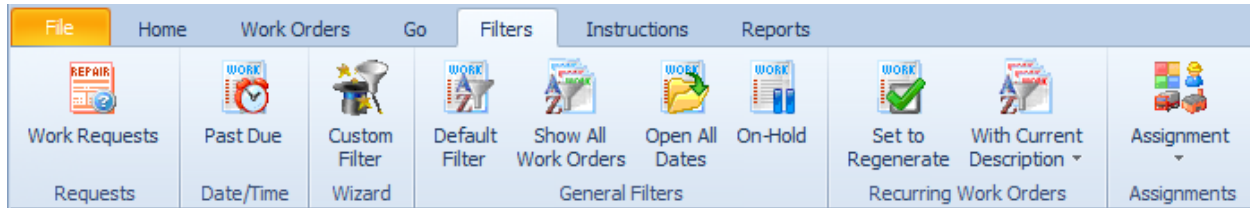


The following are the element found on the **Go** tab:

- **Mechanics Database** – Opens the Mechanics and Employee database (Lookup Screen).
- **Inventory Database** – Opens the Parts and Inventory database (Lookup Screen).
- **Assets Database** – Opens the Equipment and Assets database (Lookup Screen).
- **Planner** – Branches to the Work Orders Planner view.
- **Calendar** – Branches to the Work Orders Calendar (Outlook style) view.
- **PM Groups** – Manage PM Groups and their schedules.
- **Batch Actions** – Opens the Work Orders Batch Actions routines.
- **Budgets** – Create and manage work order related budgets.

- **Email Composer** – Opens the built-in email writer/composer dialog.
- **Maintenance Documents** – Branches control to the Maintenance Documents (Management) database.

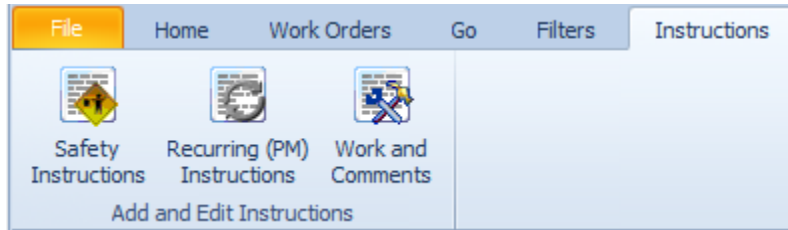
FILTERS TAB



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 for 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.

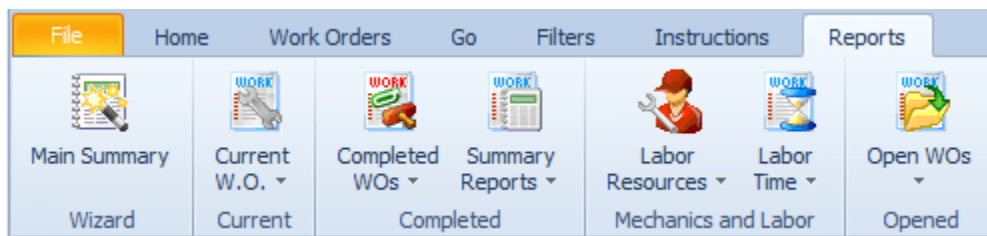
INSTRUCTIONS TAB



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.
 - **Parts Inventory** – This reports on the inventory levels as they relate to items needed for the work order completion.
 - **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.

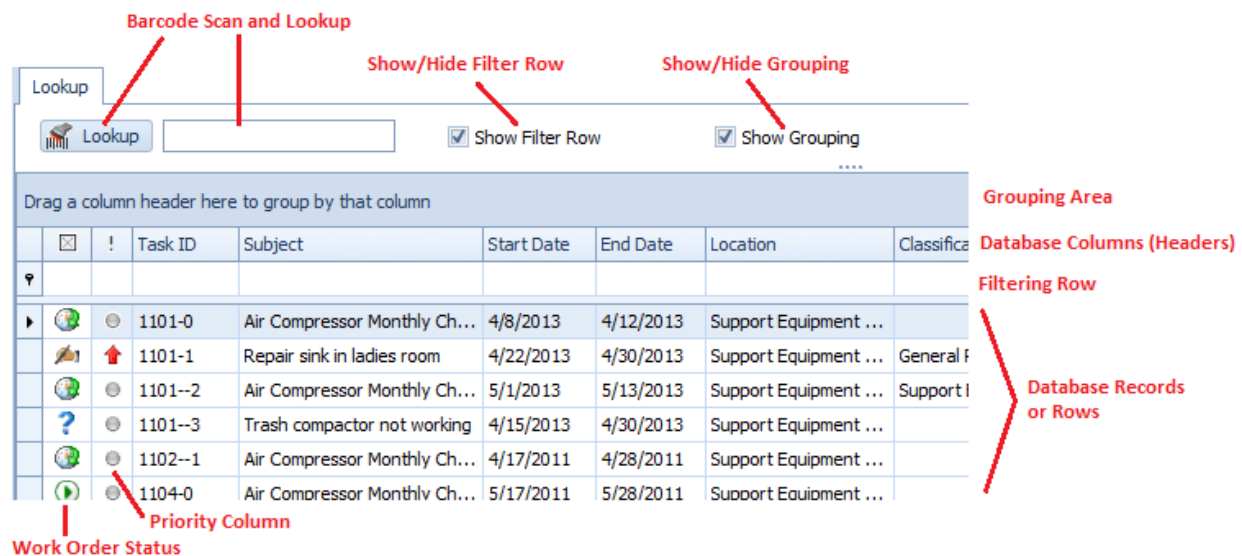
Features of the Main Scheduler

There are many features of the main scheduler, with the majority of these features found on either the tabbed pages found here, 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 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:

The screenshot shows a 'Work Order Scheduling' form with the following fields and annotations:

- Created:** 1/8/2011 2:36 PM. A red line points to this field with the annotation: **Date and Time Work Order was created**.
- Start Date:** 4/8/2013. A red box highlights this field and the Start Time field.
- Start Time:** 8:00 AM. A red line points to this field with the annotation: **Scheduled Start and End Times**.
- End Date:** 4/12/2013. A red line points to this field with the annotation: **Scheduled Start and End Date of Work Order**.
- End Time:** 5:00 PM.

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:

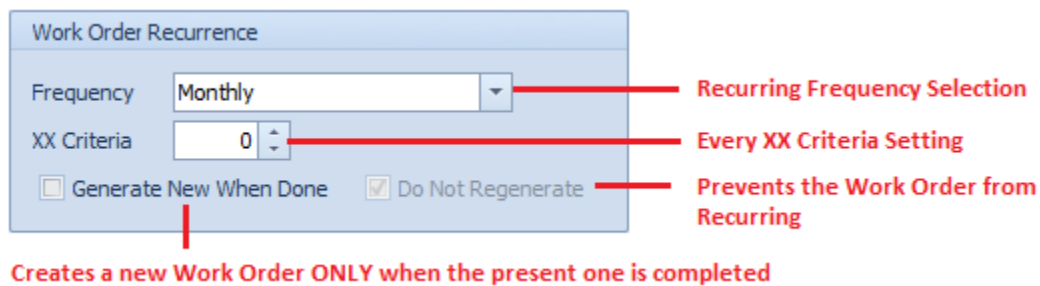
- Click on the down arrows attached to these fields.
- Click the value you want to use from the drop down list.

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:

The screenshot shows the 'Work Order Settings' dialog box. It contains three main sections: 'Task Type' with a dropdown menu showing 'Planned Maintenance', 'Priority' with a radio button and a dropdown menu showing 'Normal', and 'Estimated Down Time' with two input fields for 'Hrs' (0) and 'Mins' (0). Red lines with labels point to these sections: 'Work Order Type Assignment' points to the Task Type dropdown, 'Priority Assignment' points to the Priority dropdown, and 'Expected Duration of Work Order' points to the Estimated Down Time fields.

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.

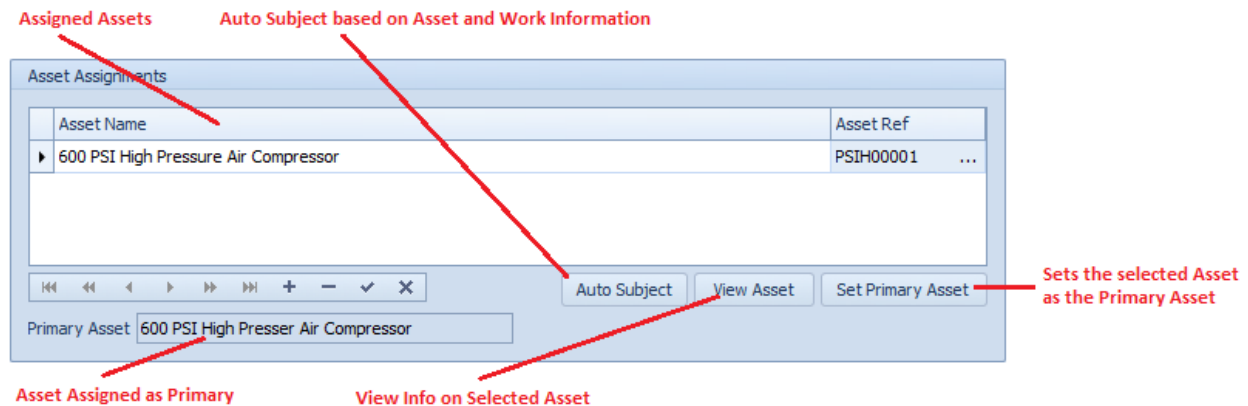
To assign the **Estimated Down Time** for your work order:

- 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:

The screenshot shows a form titled "Primary Work Assignments" with four rows. The first three rows are labeled "Assignment 1", "Assignment 2", and "Assignment 3". The fourth row is labeled "Manager". Each row has a text input field, a "Clear" button (represented by an 'X' in a square), and a "Select" button. A red arrow points from the text "Select Assignments from Employees Lookup Dialog" to the "Select" button of the first assignment. Another red arrow points from the text "Clears Assignment" to the "Clear" button of the first assignment. A third red arrow points from the text "Assignments" to the "Clear" button of the manager field.

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:

The screenshot shows a form titled "General Assignments" with three rows. Each row has a label, a dropdown menu, and a "Manage" button. Red lines point from text labels on the right to the corresponding elements in the form:

- Classification Assignment** points to the "Classification" dropdown menu.
- Manage Drop Down List** points to the "Manage" button next to the "Classification" dropdown.
- Account Assignment** points to the "Account" dropdown menu.
- Project Assignment** points to the "Project" dropdown menu.

The form contains the following data:

Field	Value	Action
Classification	General Repairs	Manage
Account		Manage
Project	Time Tracker Project	Manage

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 Auto Email

The application has the ability to automatically email copies of work orders as they become due. However, for a work order to be able to use this feature, the feature needs to be enabled.

The following image illustrates the elements of this section:

The screenshot shows a form titled "Work Order Auto Email" with two checkboxes. Red lines point from text labels on the right to the checkboxes:

- Allow use of Auto Email Feature** points to the "Use Auto Email" checkbox.
- Prevents Emails or Additional Emails to be sent** points to the "Prevent Auto Email for this Work Order" checkbox.

The form contains the following data:

Field	Value
Use Auto Email	<input type="checkbox"/>
Prevent Auto Email for this Work Order	<input type="checkbox"/>

Use Auto Email

To give the application permission to use the Auto Email feature for the current work order:

- Place a checkmark in the **Use Auto Email** checkbox.

When the application sends out an email of the work order, the application sets an *Email Sent* flag, preventing the application from sending out duplicate emails of the same work order.

Prevent Auto Email for the Work Order

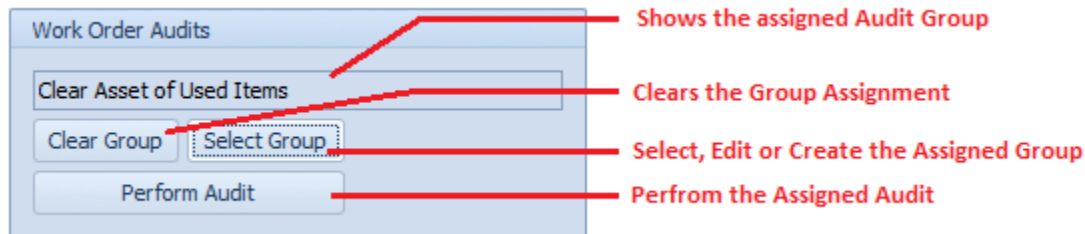
To override the *email sent* flag, allowing an additional set of emails to be sent:

- Remove the checkmark from the **Prevent Auto Email for this Work Order** check box.

Work Order Audits

With **Work Order Audits** you can attach an audit list to the end of work orders. These audits can be a requirement made by company policy, a federal requirement or from customers. Possible audit items could be a check list to see if any tools were left in the work area, was welding performed, was the area inspected and so on.

The following image illustrates the elements of this section:



Select Group

To assign an **Audit Group** to the current work order:

- Click on the **Select Group** button.
- From the invoked **Audit Setup** dialog, move to the **Audit Groups** grid and select the audit group you want to assign.
- Click on the **Select** button.

Creating Audit Lists

Audit lists require a few steps. A group is first created, and then audit items are added to this group.

Please note that if you later add items to audit groups, these new audit items may also show up on previously closed items.

Work Order Audits

Audit Setup

Audit Groups

Description
Clear Asset of Used Items

Record 1 of 1

Select

Audit Questions

Order	Question
1	Inspect and Inventory all parts used in WO Completion
2	Insert and Inventory all Tools used in WO Completion

Record 1 of 2

Cancel

Creating Audit Lists

To create an audit list:

New Audit Group

Enter the name or title for your new group in the space provide and click OK

New Group

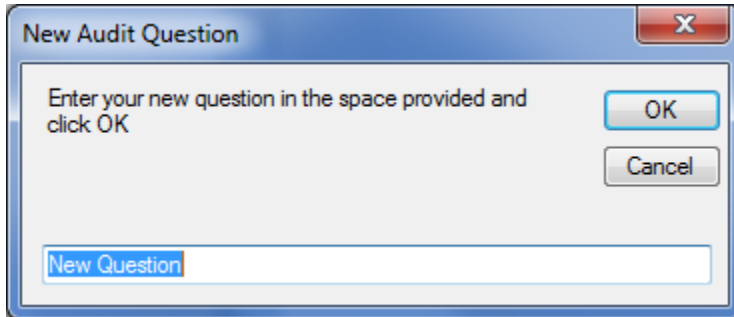
OK

Cancel

- Move to the **Options** tab in the **Maintenance Scheduler** module.
- Move the **Work Order Audits** section and click on the **Select Group** button.
- Move to the data control located below the **Audit Groups** grid and click on the **Append (+)** button.
- From the invoked **New Audit Group** dialog, move to the space provided and type in a title for the new group. This field can contain alpha/numeric characters with a maximum length of 40 characters.
- Click the **OK** button.

Adding Audit Items

To add *Audit Items* to an *Audit Group*:



New Audit Question

Enter your new question in the space provided and click OK

OK

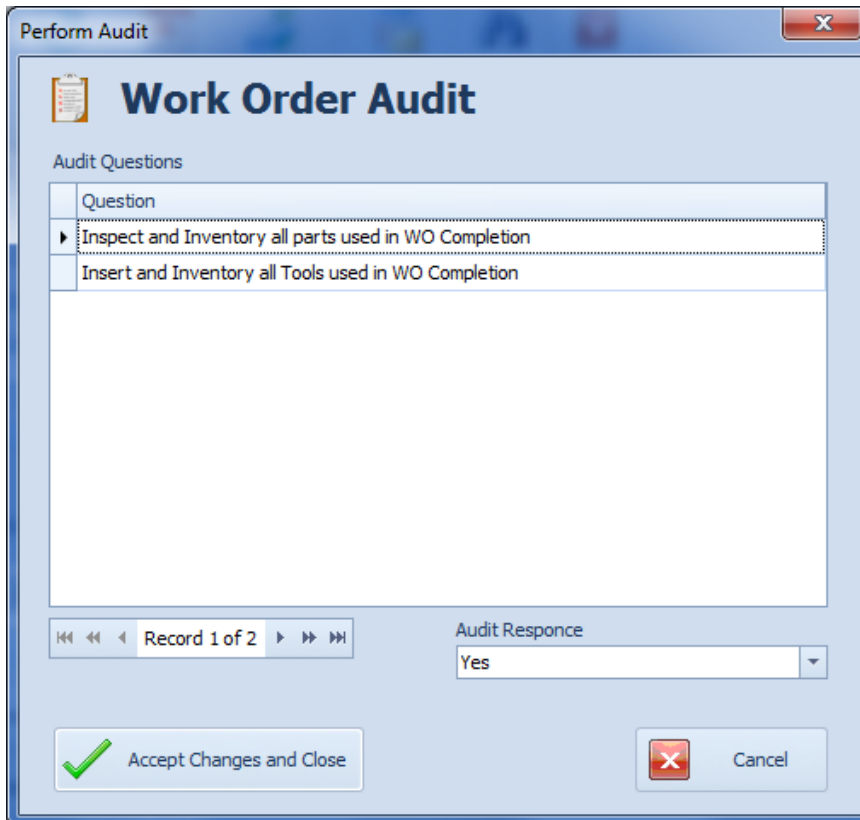
Cancel

New Question

- Move to the **Audit Groups** grid and click on the audit group you want to add items to.
- Move to the data control located below the **Audit Questions** grid and click on the **Append (+)** button.
- From the invoked *New Audit Question* dialog, move to the space provided and type in your new audit question. There are no size limit to this field, but you should try and keep it to a minimum.
- Click on the **OK** button.
- Repeat the above steps to add additional audit items.

Performing a Work Order Audit

If a work order has an **Audit Group** assigned to, it may be required that the audit be completed.



Perform Audit

Work Order Audit

Audit Questions

Question
Inspect and Inventory all parts used in WO Completion
Insert and Inventory all Tools used in WO Completion

Record 1 of 2

Audit Response

Yes

Accept Changes and Close

Cancel

To perform a work order audit:

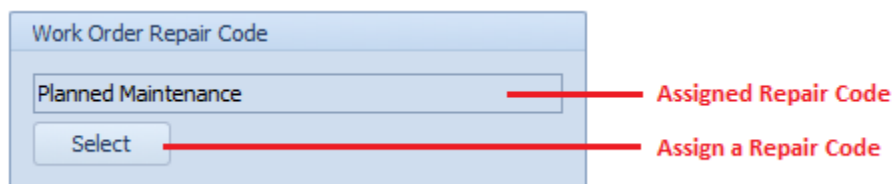
- Move to the **Options** tab in the **Maintenance Scheduler** module.
- Move to the **Work Order Audits** section and click on the **Perform Audit** button.
- Move to the list of **Audit Questions** and click on the question you want to respond to.
- Move to the **Audit Response** drop and either type in the appropriate response information or select a response from the drop down list.
- Using the data control, move to the next **Audit Question**, or click on the next question in the grid.
- Repeat the above steps until all questions are answered.
- Click on the **Accept Changes and Close** button.

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**:

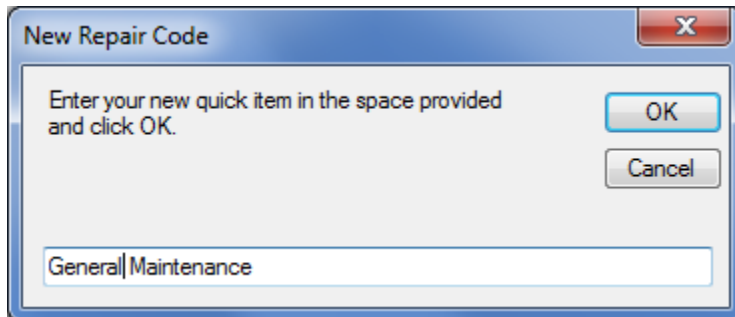
- Move to the **Work Order Repair Code** section as found on the **Options** tab.
- Click on the **Select** button.
- Move to the grid and select the repair code you want to use by clicking on it.
- Click on the **Select** button.

Creating New Repair Codes

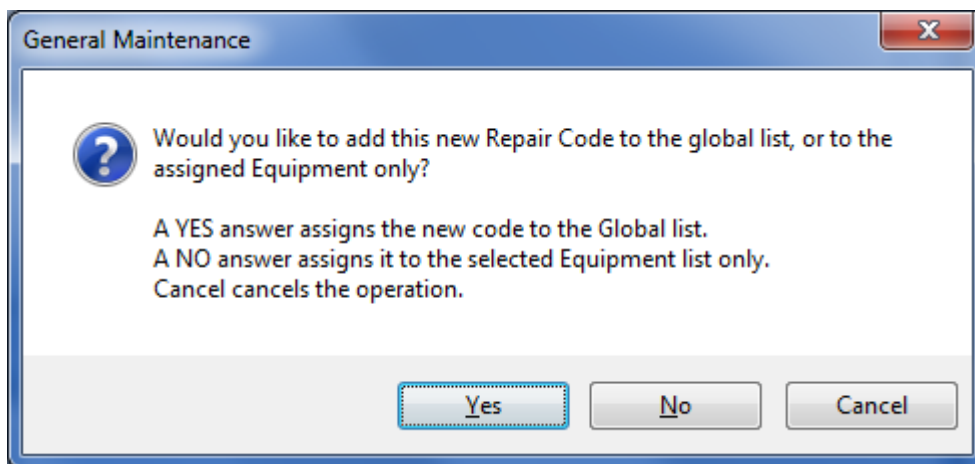
To add new items to the **Repair Codes** List:

- 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.

PM Groups

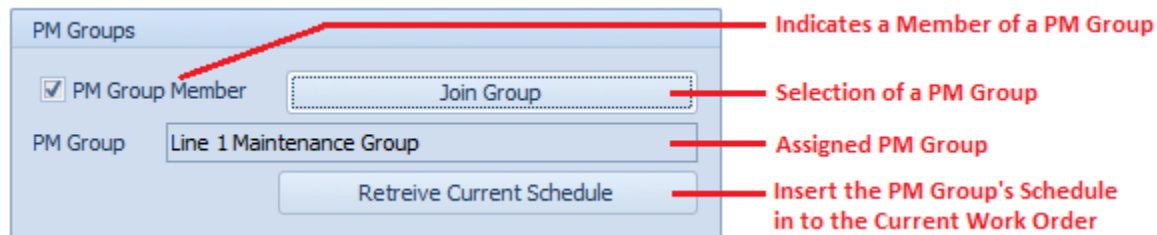
Many of you may find the **PM Groups** feature to be very useful, especially if you have sets of machines or equipment that need servicing at the same time. You may find it an even greater value if you are required to reschedule these work orders at regular intervals, as to meet production demands for a possible example.

The **PM Groups** feature gives you these added benefits as compare to the normal scheduling of Recurring, PM types of work orders:

- You can quickly retrieve a schedule into a new task by just clicking on a single button.

- You can reschedule tasks belonging to a **PM group** with a minimum number of keystrokes.
- You can change the status of all **PM group** members with a minimum number of keystrokes.

The following image illustrates the elements of this section:



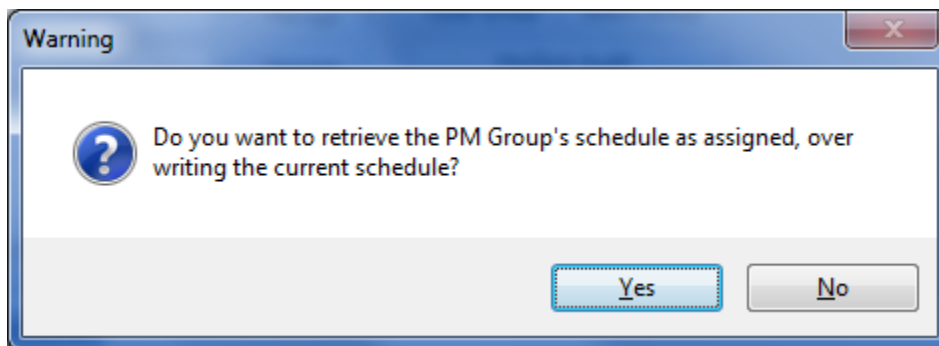
Join PM Group

To join the current work order to a **PM Group**:

- Ensure the current work order is assigned a task type of recurring.
- Move to the **PM Groups** section as found on the **Options** tab.
- Click on the **Join Group** button.
- From the invoked **PM Groups** dialog, click on the **PM Group** you want to assign from those listed in the grid of the **Lookup** tab.
- Click on the **Select** button.
- If not checked, place a checkmark in the **PM Group Member** checkbox.

Retrieve Current Schedule

Once a PM Group has been joined, you can insert its current schedule for use with the selected work order.



- Move to the **PM Groups** section as found on the **Options** tab.
- Click on the **Retrieve Current Schedule** button.
- When prompted about over writing the current schedule, click the **Yes** button.

Creating a PM Group

Before a **PM Group** can be used or assigned to work orders, they must be created.

To create a new **PM Group**:

- From the **Main Scheduler**, move to the **Go** tab in the ribbon.
- Click the **PM Group** option.
- Move to the data control located below the grid of the **Lookup** tab and click on the **Append (+)** button.

The screenshot shows the 'PM Groups' dialog box with the 'Details' tab selected. The 'Group Title' field contains 'New PM Group'. The 'Group Scheduling' section includes fields for 'Start Date' (6/ 6/2014), 'End Date' (6/ 7/2014), 'Start Time' (8:00 AM), and 'End Time' (5:00 PM). The 'Group Recurrence' section includes a 'Frequency' dropdown (set to 'None'), 'XX Criteria' (set to 'None'), and checkboxes for 'Generate New When Done' and 'Do Not Regenerate'. The 'Data Control' at the bottom shows 'Record 1 of 1'. The 'Select' button is highlighted with a green checkmark, and the 'Close' button is highlighted with a red X.

Annotations:

- Group's Title**: Points to the 'Group Title' field.
- Group's Scheduling (Same as within the main scheduler)**: Points to the 'Group Scheduling' section.
- Group's Recurrence (Same as within the main scheduler)**: Points to the 'Group Recurrence' section.
- Data Control**: Points to the 'Record 1 of 1' field.
- Select Button**: Points to the 'Select' button.

- Move to the **Details** tab.
- Click and edit the **Group Title** field. This field can contain up to 40 alpha/numeric characters.
- Move to the **Group Scheduling** section and setup the scheduling criteria found here.
 - **Start Date and Time** -These values would indicate the Scheduled date and time you would like work to commence on the group's work orders.
 - **End Date and Time** -These values would indicate the Scheduled date and time you would like work to be completed by.
- Move to the **Group Recurrence** section and setup this information.
- **Frequency** -This field allows you to specify the frequency at which the recurring work orders will recreate (regenerate) themselves. To setup the **Frequency**:
 - Click on the down arrow attached to this field.
 - Click on the value you want to assign from those listed.

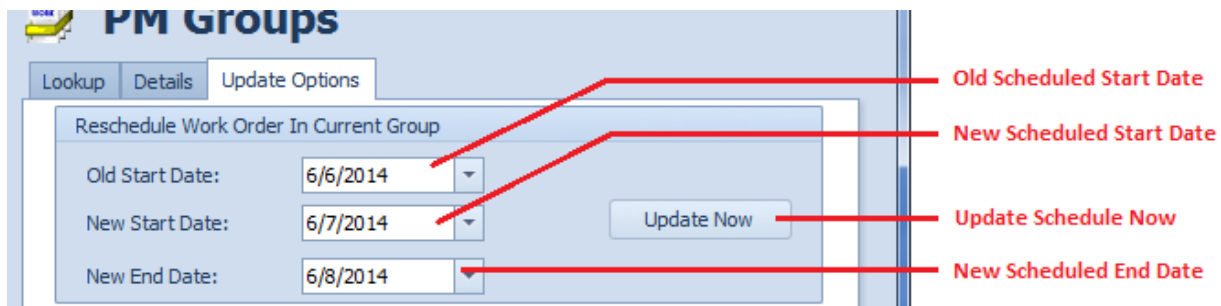
- **XX Criteria** - If the selected **Frequency** has **XX** anywhere in its description, the **XX Criteria** value must also be provided. This field only accepts numeric values. To assign the **XX Criteria** value, please do one of the following:
 - Click the up arrow to increase the value here.
 - Click the down arrow to decrease the value here.
 - Click and type in your value in the space provided.
- **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.
- **Do Not Regenerate** - This option will prevent the program from regenerating the work orders at the set frequency.
- *With everything setup correctly, move to and click on the **Post/Save** (checkmark) button in the data control.*

For more information about the settings on this tab, please refer to [Work Order Recurrence](#) section discussed earlier in this chapter.

Rescheduling PM Groups Work Orders

One of the key advantages of using PM Groups is found in the ability to reschedule all work orders belonging to a group with a minimum of key strokes.

To reschedule the work orders in a PM Group:



- From the **Main Scheduler**, move to the **Go** tab in the ribbon.
- Click the **PM Group** option.
- From the invoked **PM Groups** dialog, move to the **Lookup** tab.
- Click on the **PM Group** that contains the work orders you want to reschedule from those listed in the grid.
- Move to the **Update Options** tab.
- Move to the **Old Start Date** field and ensure that this matches the Scheduled **Start** dates of the work orders you want to reschedule.
- Move to the **New Start Date** field and edit this value with the new start date you want to assign to the group's work orders.
- Move to the **New End Date** field and edit this value with the new scheduled **End** date you want to reassign to the group's work orders.

- Click on the **Update Now** button found in this area.

Updating the Status of Work Orders Belonging to a PM Group

Another advantage of using PM Groups is found in the ability of updating the status of all group work orders with a minimum of steps.

To update the status of all work orders belonging to a group:

The screenshot shows a dialog box titled "Update the Status of Work Orders in Current Group". It contains the following fields and controls:

- Scheduled Start Date:** A text box containing "6/6/2014". A red line points to it with the label "Group's Schedule Start Date".
- New Status Indicator:** A dropdown menu showing "Completed". A red line points to it with the label "New Status Indicator to Apply".
- Completion Date:** A text box containing "6/5/2014". A red line points to it with the label "Completion Date to Assign".
- Update Now:** A button. A red line points to it with the label "Update Status Now".
- Update Completion Dates:** A checked checkbox. A red line points to it with the label "Allow Updating Completion Dates".
- Save to History Log:** An unchecked checkbox. A red line points to it with the label "Save Summary to Asset Log".

At the bottom of the dialog, there is a status bar showing "Record 1 of 1" and navigation icons.

- From the **Main Scheduler**, move to the **Go** tab in the ribbon.
- Click the **PM Group** option.
- From the invoked **PM Groups** dialog, move to the **Lookup** tab.
- Click on the **PM Group** that contains the work orders you want to update from those listed in the grid.
- Move to the **Update Options** tab.
- Move to and click the down arrow adjacent to the **New Status Indicator** field.
- Select the new status indicator you want to assign.
- To update the work orders completion dates, edit the value in the **Completion Date** field; also check the **Update Completion Dates** checkbox.
- To save a summary of the completed work orders to their Primary Asset's History Logs, place a checkmark in the **Save to History Log** checkbox.

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:

The screenshot shows a dialog box titled "Work Order Custom Fields". It contains two rows of fields:

- Row 1:** "Caption 1" with a text box containing "Room", and "Value 1" with a text box containing "Production". A red line points to the "Room" text box with the label "Displayed Captions".
- Row 2:** "Caption 2" with a text box containing "Building", and "Value 2" with a text box containing "Main". A red line points to the "Main" text box with the label "Field Values".

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

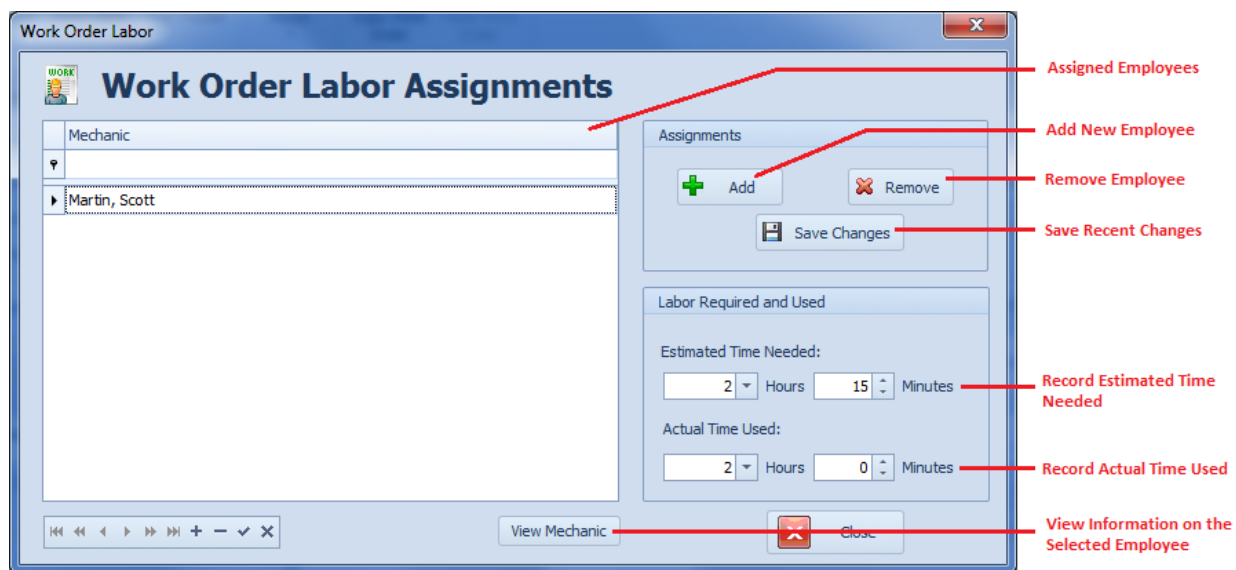
You can assign as many mechanics or employees as required to a work order. Those assigned here differ from the three possible assignments made in the *Primary Assignments* section. The resources here will be used in the calculation of the total work order costs and time management. Whereas the others 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

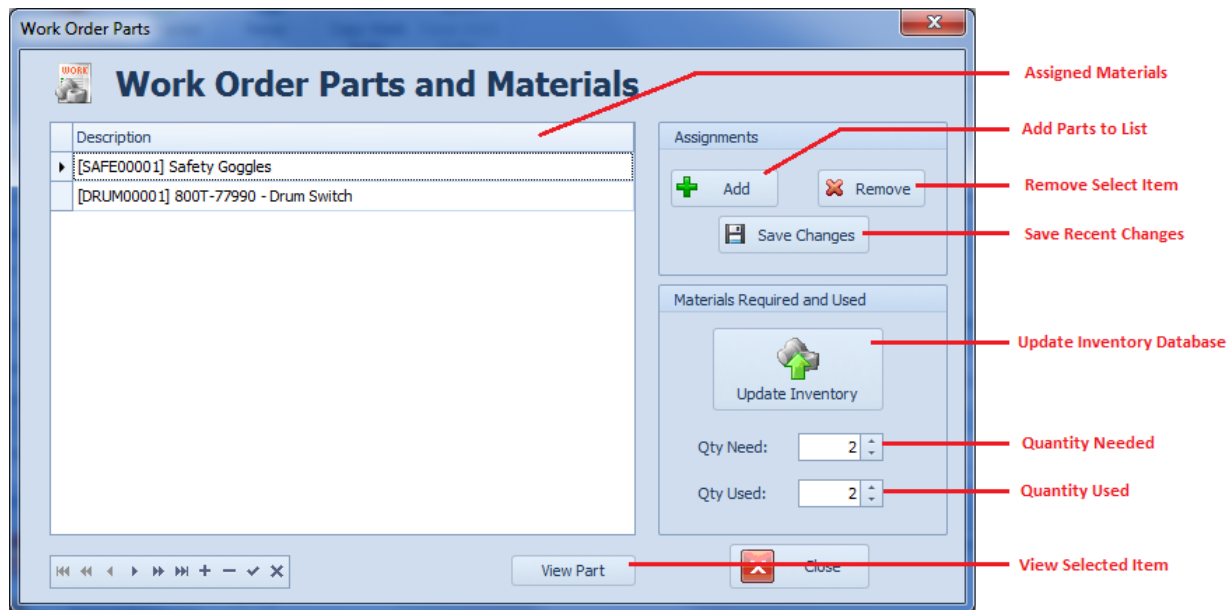
- Select the employee you want to make the assignment to from those listed in grid.
- Move to the **Estimated Time Needed** area and edit the information found there.
- Click on the **Save Changes** button.

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.

Material Resources

You can assign parts or materials needed in work order completion, and also have these materials checked out of inventory.



To assign Material 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 **Material Resources** button.

Or

- Move to the **Work Orders** tab in the ribbon and click on the **Materials** option.
- Move to and click on the **Add** button in the **Assignments** group.
- From the invoked **Parts and Inventory** lookup dialog, select the item you want to add from those listed in the grid.
- Click on the **Select** button.
- Click **Save Changes** button.

To assign Quantity Needed

- Select the item you want to make the assignment to from those listed in grid.
- Move to the **Qty Need** area and edit the information found there.
- Click on the **Save Changes** button.

To record Actual Quantity Used

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

Time Tracker

The **Time Tracker** feature can be used in conjunction with **Labor Resources** feature discussed earlier in this chapter. With this feature you can track time in 'real time' utilizing a built-in time clock. This thereby allows you use this time clock when commencing work, breaking for some reason, resuming work, and recording total actual time accumulated. The resulting tracked information can also be applied to the **Labor Resources** of any assigned work order or used with the **Time Clock Report** associated with this feature.

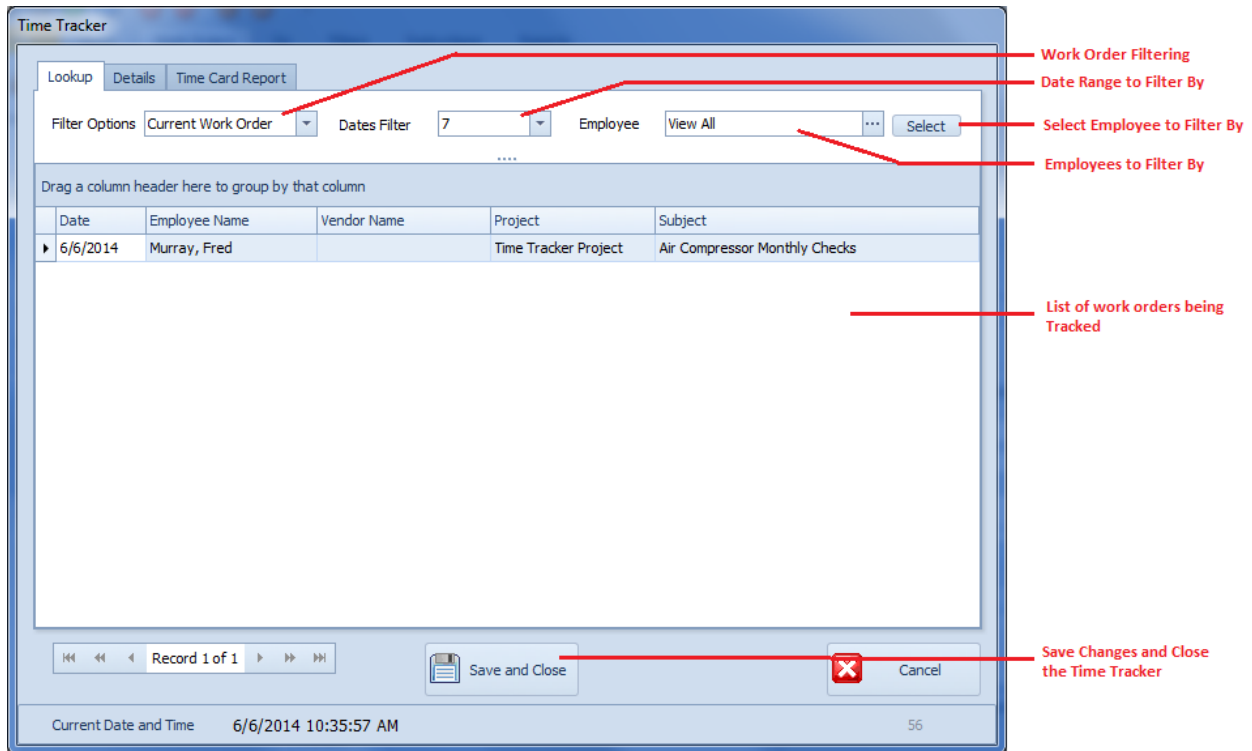
To access the Time Tracker

- Move to the **Options** tab in the *Maintenance Scheduler* module.
- Move to the **Resources** tab, which is located within the **Options** tab.
- Click in the **Time Tracker** button.

Or

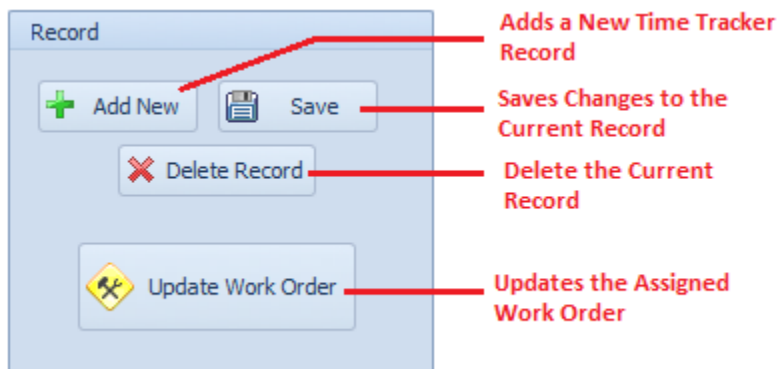
- Move to the **Work Orders** tab in the ribbon and click on the **Time Tracker** option.

The following are elements found on the **Lookup** tab of the **Time Tracker**:



- **Filter Options** – This filters the Time Tracker database by:
 - **Current Work Order** – Filters the database by the currently selected work order of the main scheduler.
 - **All Open Records** – Filters the database by all 'non-completed' records.
 - **View All Records** – Shows all records in the database.
- **Days Filter** – Filters the database from today's date minus the selected value forward.
- **Employee** – This option will filter the database to show records belonging to all assigned employees or just one. To filter by a single employee:
 - Move and click on the **Select** button.
 - Click on the employee you want to use from those listed.
 - Click on the **Select** button.

Creating a new Time Tracker Record



- Launch the Time Tracker.
- Click on the **Details** tab.
- Move to the **Record** group and click on the **Add New** button.

Deleting a Time Tracker Record

- Launch the **Time Tracker**.
- Select the record you want to delete from the grid on the **Lookup** tab.
- Click on the **Details** tab.
- Move to the **Record** group and click on the **Delete Record** button.
- Click the **Yes** button when warned about proceeding.

Saving Your Time Tracker Record

- From the **Time Tracker** move to the **Details** tab.
- Move to the **Record** group and click on the **Save** button.

Making Assignments to the Time Tracker Record

The screenshot shows the 'Assignments' form with the following fields and annotations:

- Select Employee:** Martin, Scott (with a clear 'X' button). An annotation 'Assignment Lookup Buttons' points to the 'Select Employee' button.
- Select Vendor:** Safety First and Last, Inc (with a clear 'X' button). An annotation 'Clears Assignments' points to the 'X' button.
- Select Project:** (empty dropdown menu).
- Select Work Order:** 1101-0 (with a clear 'X' button). An annotation 'Assigned Work Order Details' points to the '1101-0' text.
- Assigned Work Order Details:** Air Compressor Monthly Checks (with a scroll bar).

- Launch the **Time Tracker**.
- Select the record you want to edit from the grid on the **Lookup** tab.
- Click on the **Details** tab.
- Move to the **Assignments** group.
- Move to and click the various **Select ...** buttons found in this area, such as **Select Employee**.
- Select the record you want to assign from those listed.
- Click the **Select** button.
- Repeat the above steps for each assignment you want for this record.

Note: Clicking on the **X** button adjacent to each of these fields allows you to clear these assignments.

Recording Specifics on the Time Tracker record

The screenshot shows the 'Specifics' form with the following elements labeled:

- Time Record Date**: Points to the 'Record Date' dropdown menu.
- Status Indicator**: Points to the 'Completed' checkbox.
- Description of Record**: Points to the 'Description' text field.
- Use Assigned Work Order Information for Description**: Points to the 'Use Work Order' button.
- Estimated Time**: Points to the 'Estimated Time' input fields (Hours: 5, Minutes: 0).
- Actual Recorded Time**: Points to the 'Actual Time' input fields (Hours: 0, Minutes: 55).

The above illustration shows the elements found in the **Specifics** group:

- **Record Date** – This is the date assignment for the selected record. You can change this date by clicking on the down arrow and then selecting a new date.
- **Completed** – A checkmark place in this checkbox would indicate that this **Time Tracker** record is completed.
- **Description** – This is a brief description to help identify this record. It can contain up to 100 alpha/numeric characters.
- **Use Work Order** – Clicking this button will insert the *Work Order's Subject* and *Task ID* fields into the **Description** field.
- **Estimated Time** – The two fields here allow you to optionally record the estimated time for this record.
- **Actual Time** – The two fields here allow you to record actual time used for this record. These fields can also be set from the *Time Clock* routines.

Tracking Time with the Time Clock

The screenshot shows the 'Time Clock' interface with the following elements labeled:

- Total Accumative Time of All Starts and Stops**: Points to the digital display.
- Start or Re-Start Clock**: Points to the 'Start' button.
- Pause Clock**: Points to the 'Pause' button.
- Stop the Clock and Apply its Time**: Points to the 'Apply Time' button.

To track time with the **Time Tracker**

- Launch the **Time Tracker**.
- Select the record you want to track time on from the grid on the **Lookup** tab.
- Click on the **Details** tab.

Start or Restart

To start or restart the time tracking process:

- Move to the **Time Clock** group and click on the **Start** button

Pause

To temporarily pause the tracking of time:

- Move to the **Time Clock** group and click on the **Pause** button

Stop

To stop tracking time and apply the accumulated time to the **Actual Time** section:

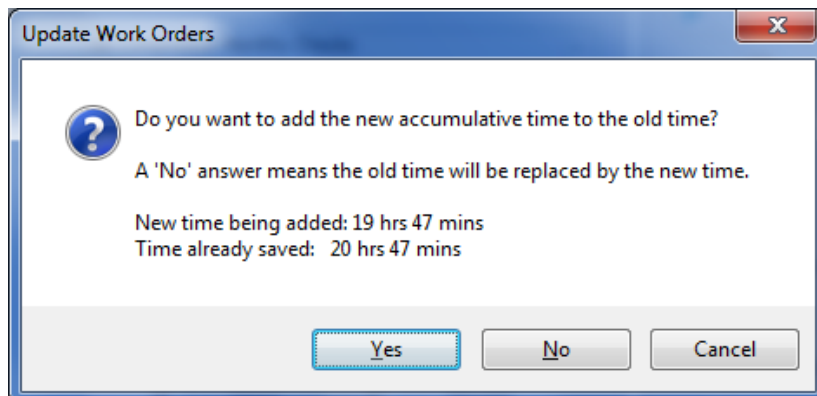
- Move to the **Time Clock** group and click on the **Apply Time** button.
- Click the **Yes** button if you want to add the new recorded time to the existing time, or click **No** to replace previously recorded time with the newly recorded time.

Updating a Work Order with the Time Tracker

You can write accumulated time tracked directly to the assigned work order's **Labor Resources**. This information can replace existing information as it applies to the assigned mechanic, add the information to **Labor Resources** in the form of a new record, or add the amount to an existing value.

To apply tracked time for use with the assigned work order:

- Move to the **Record** group on the **Time Tracker Details** tab.
- Click on the **Update Work Order** button.
- If this is a new entry, or if the current entry of the **Labor Resources** has no Actual Hours Worked recorded for the assigned employee, the time tracked will be added to the **Labor Resources** database. Otherwise the following message will be displayed:



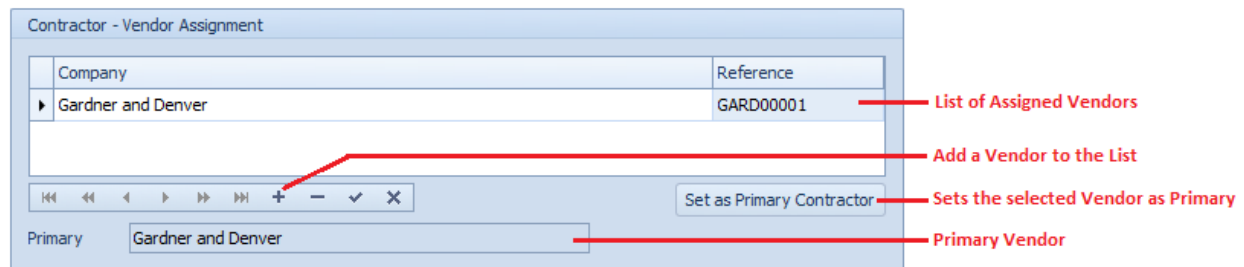
- Clicking on the **Yes** button will add the new time recorded to the time already saved. Clicking on the **No** button will replace any saved information with the new time information. Clicking **Cancel**, will cancel the operation.

- When the operation completes, you will be notified of such, and if successful, you'll also be given the chance to view or edit the **Labor Resources** as assigned.

Contractor - Vendor Assignment

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

The following image illustrates the elements of this section:



To assign a contractor to the work order

- Move to the **Options** tab in the **Main Scheduler**.
- Move to the **Resources** tab, which is located within the **Options** tab.
- Move to the **Contractor – Vendor Assignment** section and click on the **Append (+)** button in the data control found there.
- From the invoked lookup dialog, click on the Vendor record you want to assign.
- Click on the **Select** button.
- Click the **Post** (checkmark) button in the Contractors' data control.

To set which contractor to assign as the primary

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

To remove a contractor from the current work order

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

Auto Mail List

In addition to having the *Auto Email* feature from emailing those found in the **Primary Work Assignments** area, you can also setup an almost endless list of additional email recipients. This list can contain employees, contractors, or any email you manually type in.

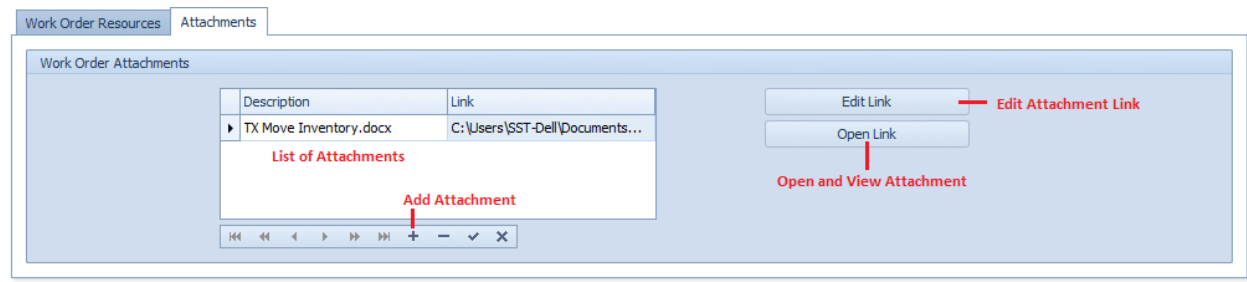
To add mail recipients to be used with the *Auto Email* feature:

- Move to the **Options** tab in the *Main Scheduler*.
- Move to the **Work Order Resources** tab, which is located within the **Options** tab.
- Move to the **Auto Mail List** group and click on the **E-Mail List** button.
- Edit your email list using the *Mail Recipients* dialog. For more information on this feature please refer to *Mail Recipients* in the *Common Features* chapter.

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.

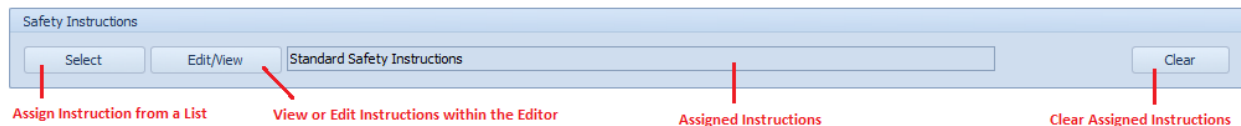
Instructions Tab

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:

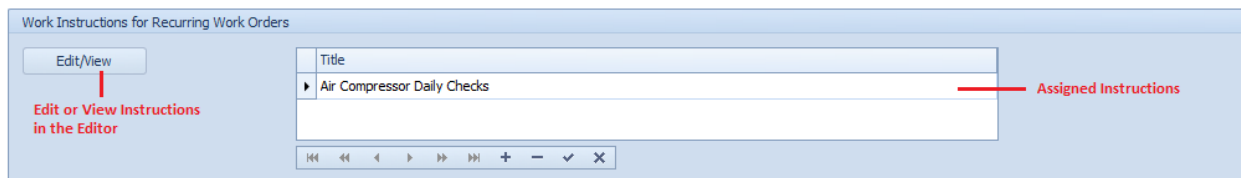
- Move to the **Safety Instructions** group and click on the **Edit** button.
- This will open the instructions with the *Repair Procedures Editor*.

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.

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

Sink is clogged and overflowing. Bathroom also needs mopping.

[] Using an auger, unclog the blocked drain. Test to ensure proper flow.

[] Clean and mop the restroom. Empty the trash cans, restock paper towels, protective seat covers and toilet paper. Note any corrective actions that may be needed.

< INSTRUCTIONS EDITOR >

Auto Subject based on the work to be performed

Auto Subject

Open with Editor

Edit the instructions with the Repair Procedures Editor

Select Pre-created instructions from a list

Select

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

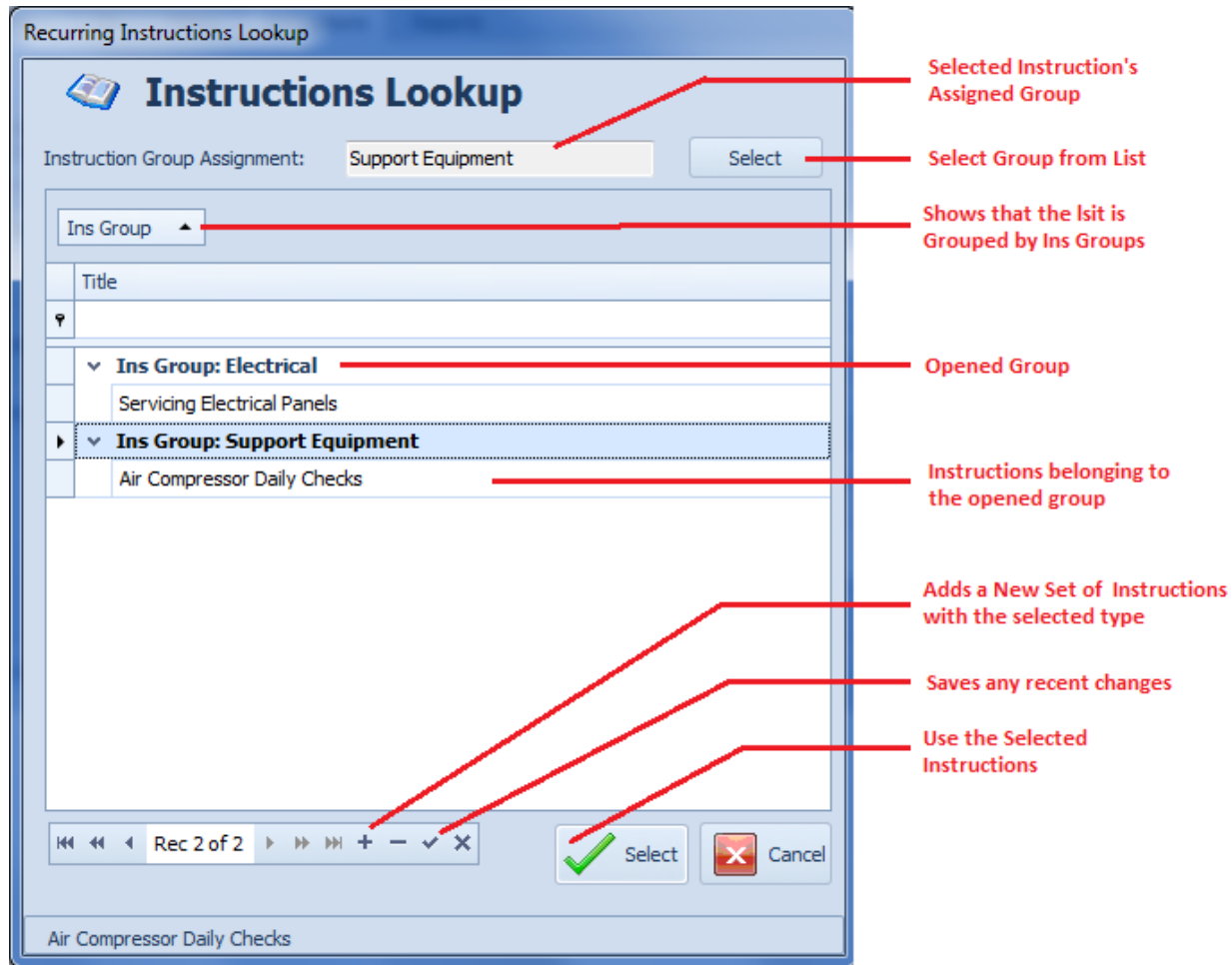
The **Instructions Database** is used to store reusable task instructions. This is useful when you want to reuse the same set of instructions for various machines, and with recurring work orders. For example, let's say you have a common gearbox that is used throughout your facility. It only makes sense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

The screenshot shows the 'Work Order Completion Information' form. Red lines and text annotations point to various fields and buttons:

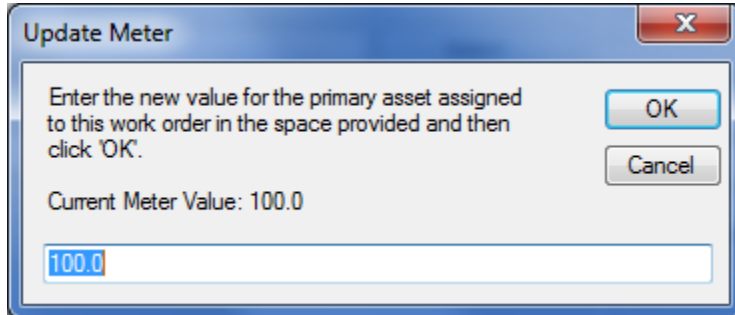
- Date Completed**: 5/28/2014 (Annotation: Set Completion Date)
- Completed By**: Murray, Fred (Annotation: Select Employees from List)
- Inspected By**: (Annotation: Select Employees from List)
- Meter Value**: 200 (Annotation: Retrieve Asset's Current Value)
- Get Current Meter** button (Annotation: Set the Asset's Current Value)
- Set Current Meter** button (Annotation: Set the Asset's Current Value)
- Actual Down Time**: 2 Hours, 45 Minutes (Annotation: Record Actual Down Time)
- Complete** button (Annotation: Opens the Work Order Completion Wizard)
- History** button (Annotation: Saves a Summary of the Work Order to the Asset's History Log)

- **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:



The 'Update Meter' dialog box contains the following elements:

- Instruction: "Enter the new value for the primary asset assigned to this work order in the space provided and then click 'OK'."
- Buttons: "OK" and "Cancel".
- Text: "Current Meter Value: 100.0"
- Input field: A text box containing "100.0".

- 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**.

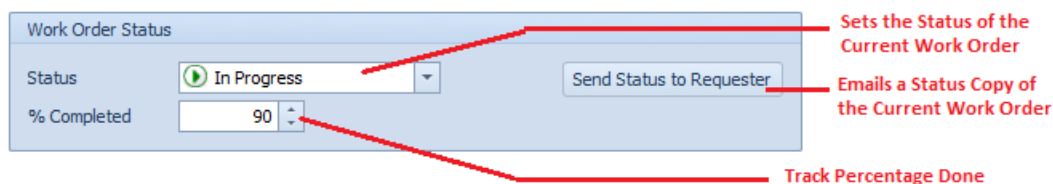
Actual Down Time

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:



The 'Work Order Status' form includes the following elements and annotations:

- Status**: A dropdown menu currently showing 'In Progress'. A red arrow points to it with the annotation: "Sets the Status of the Current Work Order".
- % Completed**: A spinner box currently showing '90'. A red arrow points to it with the annotation: "Track Percentage Done".
- Send Status to Requester**: A button. A red arrow points to it with the annotation: "Emails a Status Copy of the Current Work Order".

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.

To Send Status to Requester

- From the **Status** tab of the **Main Scheduler**, 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 Costs

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

The screenshot shows a form titled "Work Order Costs" with the following fields and values:

Field	Value
Labor Costs	0
Contractor/Vendor	
Other Costs	
Materials Costs	180.63
Taxes/Permits	
TOTAL COSTS	180.63

Below the fields is a button labeled "Calculate Costs".

Red text annotations:

- On the right: "Allows you to record all the Costs associated with the current work order"
- Below the "Calculate Costs" button: "Calculate all the Labor and Materials used, then totals all the fields of this section"

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 multiplies 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.

Completion Notes and Delays

This is a test of the Delays and completion comments

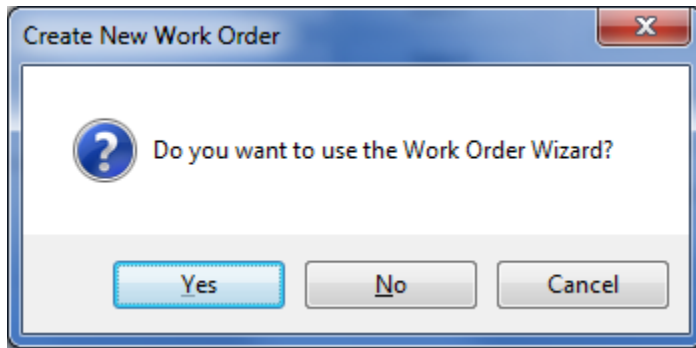
Allows you to Edit this section with the Editor

Allows you to Record Completion Comments, Actions and Delays

Open with 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

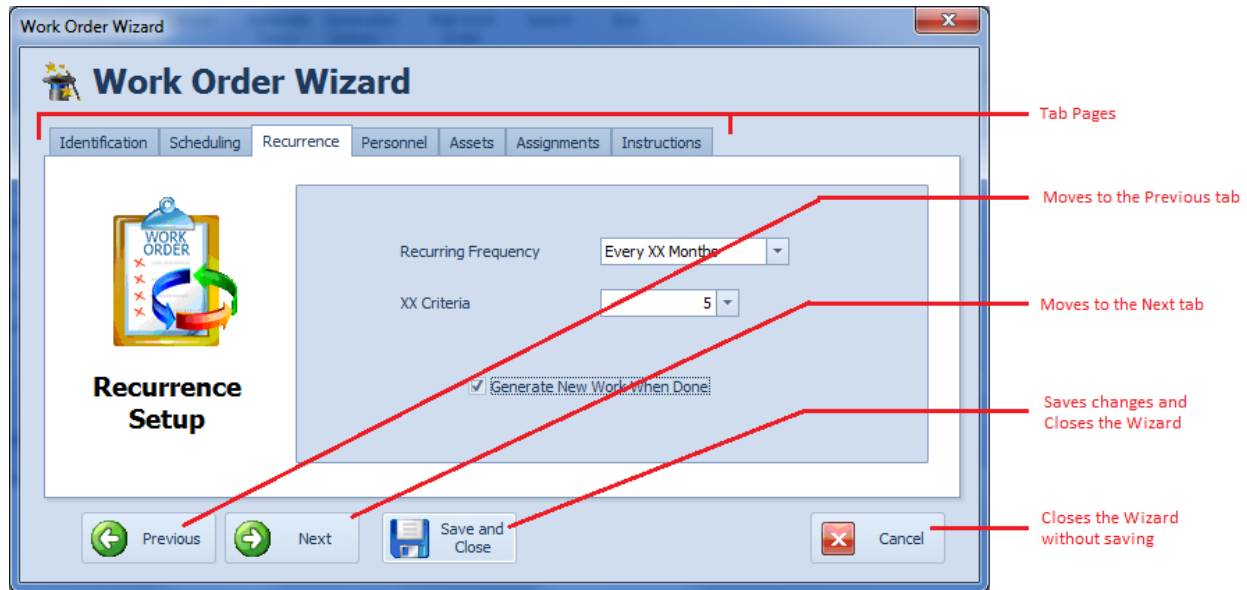
To save changes to the main work order record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's **Quick Access** toolbar.

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.

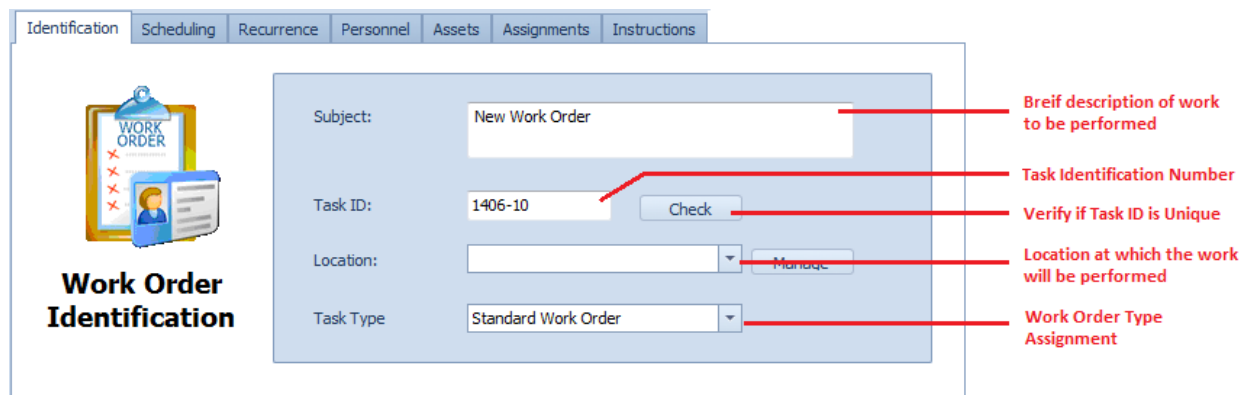
The following illustration shows the general or shared features of the Wizard:



- **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:

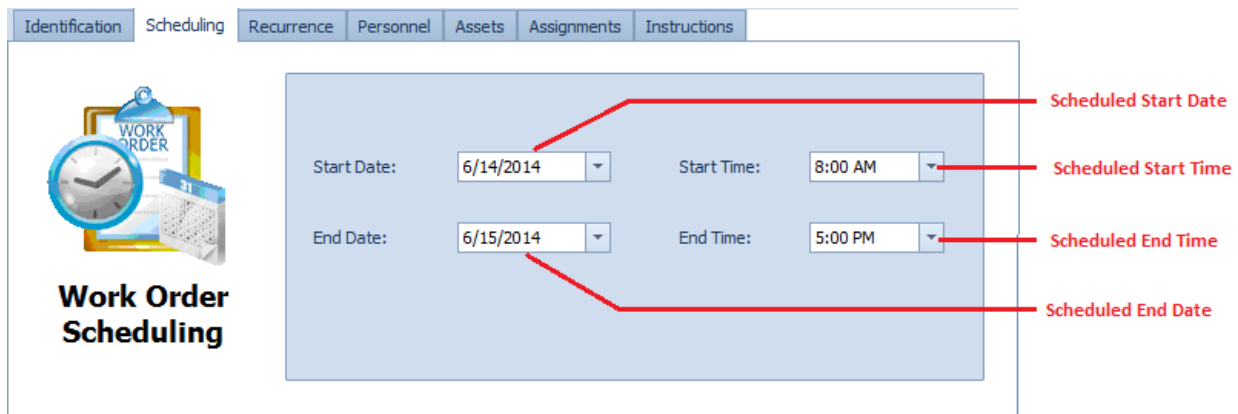


- **Subject** – This is a brief description of the work order. It can contain up to 100 alpha/numeric characters.
- **Task ID** – This is generated for you by the program. You are allowed to edit this value, but it is not recommended.
- **Check** – This checks to ensure that the supplied **Task ID** 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:



The screenshot displays the 'Scheduling' tab within a wizard interface. The tab is part of a sequence including Identification, Recurrence, Personnel, Assets, Assignments, and Instructions. On the left, there is a graphic with a clock and a calendar labeled 'Work Order Scheduling'. The main area contains four dropdown menus for scheduling: 'Start Date' (6/14/2014), 'Start Time' (8:00 AM), 'End Date' (6/15/2014), and 'End Time' (5:00 PM). Red lines with labels point to each field: 'Scheduled Start Date' points to the Start Date dropdown, 'Scheduled Start Time' points to the Start Time dropdown, 'Scheduled End Time' points to the End Time dropdown, and 'Scheduled End Date' points to the End Date dropdown.

- **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:

Recurrence Setup

Recurring Frequency: Every XX Months

XX Criteria: 5

☒ Generate New Work When Done

Work Order Repeating Frequency

XX Criteria Setting

Generate New When Done Setting

- **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:

Primary Work Assignments

Assignment 1: Eliot, Kate

Assignment 2: Murray, Fred

Assignment 3:

Select

Select

Select

Select and Assign Employees

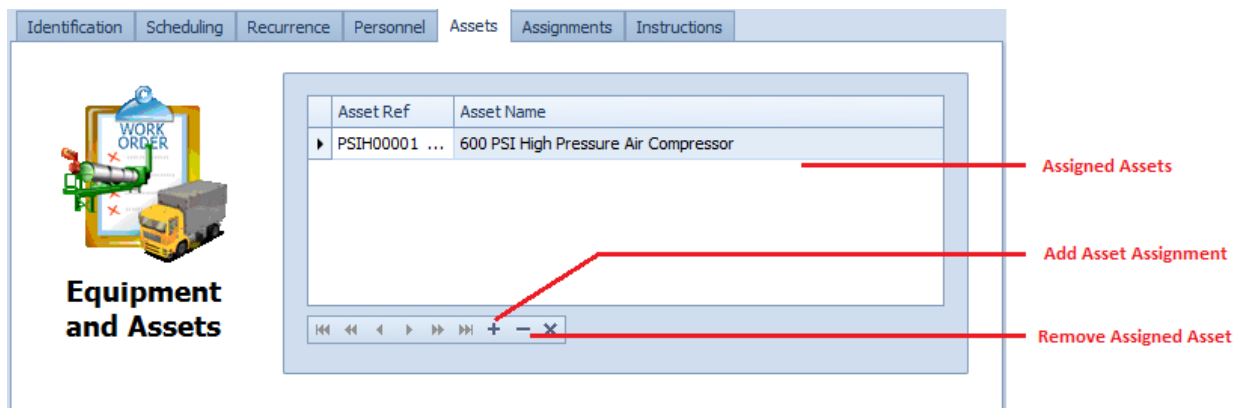
The **Primary Work Assignment** section allows you to assign 3 employees or mechanics to the current work order. These assignment show in the header section of work orders, and are also used with the **Auto Work Order Email** feature.

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:

General Assignments

Classification: Support Equipment Maintenance Manage

Account: Manage

Requester: Albright, George Select

Requester Email: georgea@abc.com

Classification Assignment

Account Assignment

Employee Selection

Employee/Requester Information

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:

Work Order Instructions

Safety Instructions

Select Edit Standard Safety Instructions

Work Instructions

Title

Servicing Electrical Panels

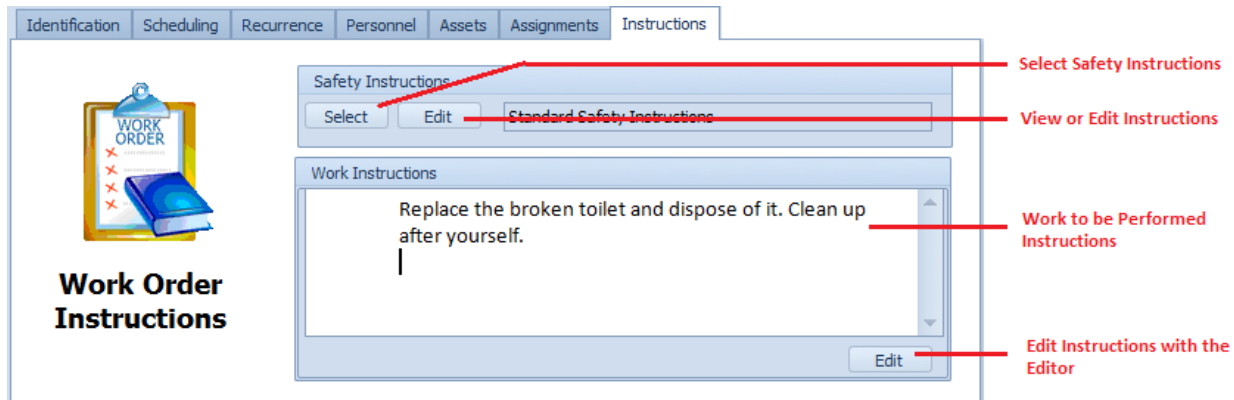
View - Edit

Select Safety Instruction

View or Edit Instructions

Add PM Instructions

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

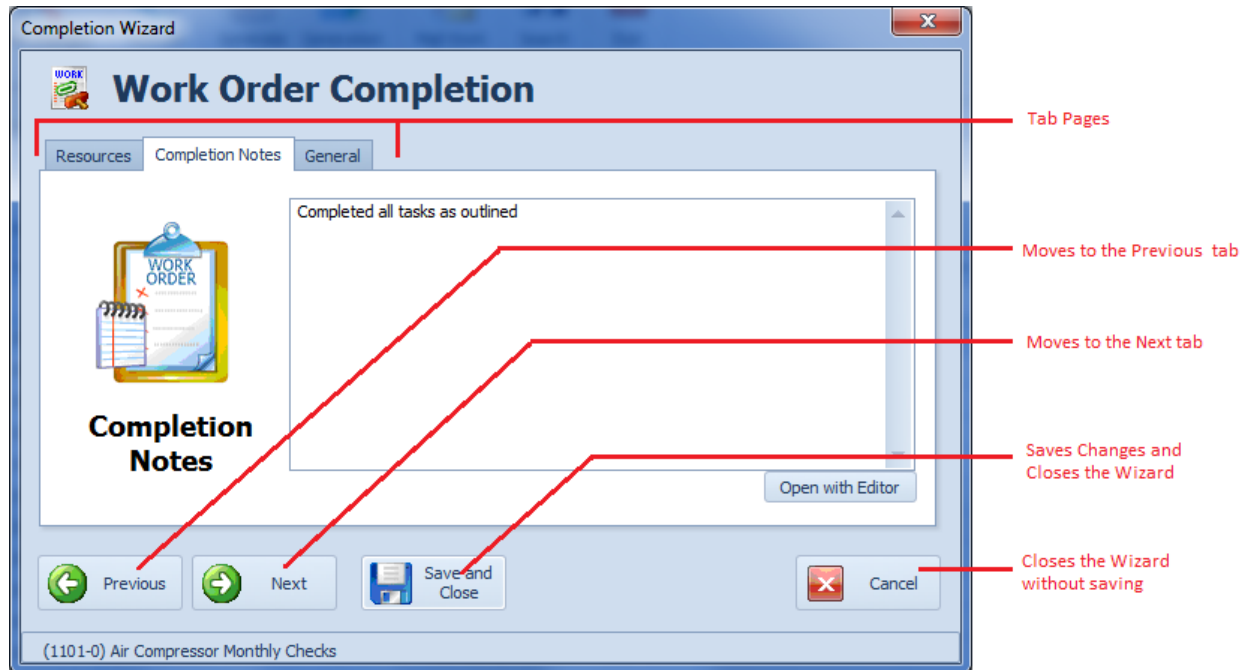
Whenever you either make changes to work orders, or create a new one with *Work Order Wizard*, ensure to save your changes.

- 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.
- **Parts and Inventory** – Clicking on this button will launch the **Work Order Parts** dialog. This dialog will allow you to record inventory items used in work order completion. This feature is discussed in the **Inventory 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

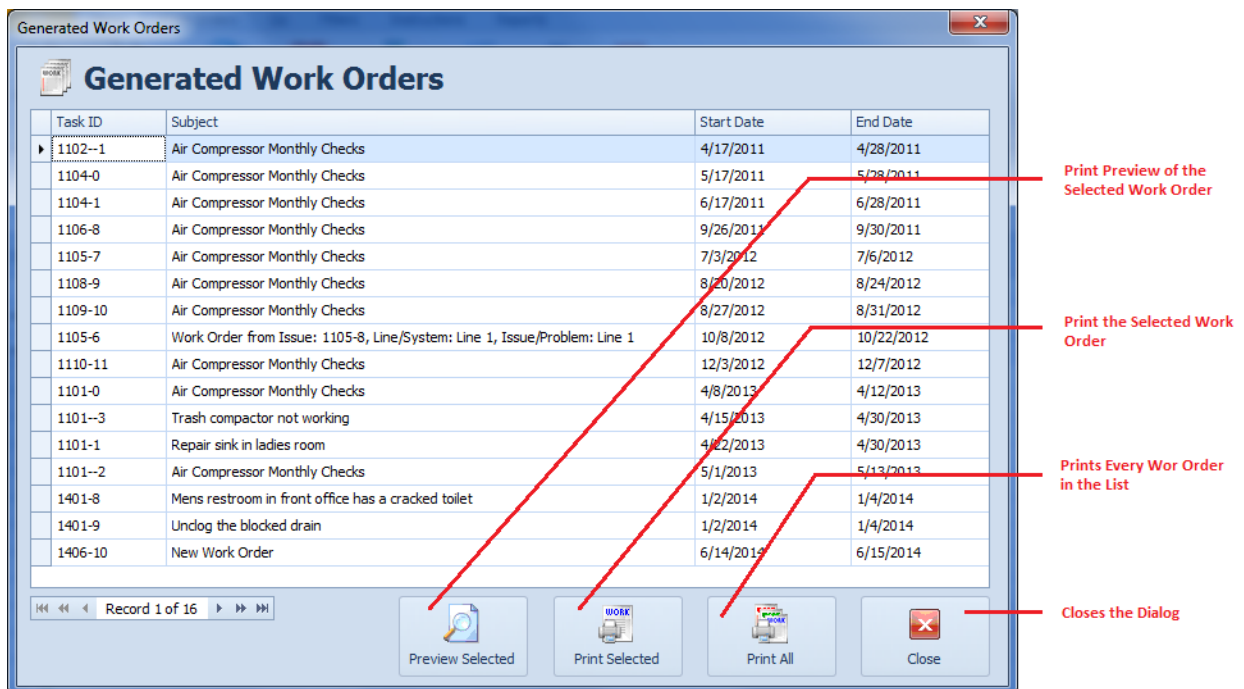
Whenever you either make changes using the **Work Order Completion Wizard**, ensure to save your changes.

- 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.

Mail Work Order

To have the program automatically attach the current work order to an email message:

- From the **Main Scheduler**, locate the record that you would like to email.

- Move to the **Home** tab in the ribbon and select the **Mail Work Order** option.
- Refer to the **Email Composer** section of the **Common Features** chapter on how to set up your message. Then click on the **Send** button.

Search

To perform a search on the Work Orders database:

- From the **Main Scheduler**, 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.

Scheduling by Meter

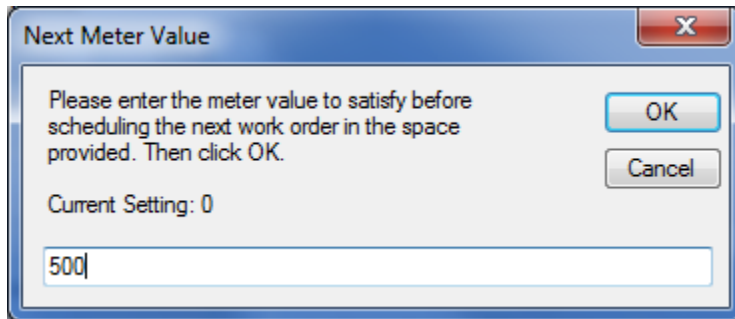
With the **Maintenance Scheduler** module you can have new recurring work orders regenerate by meters values. These meters can actually represent a variety of items such as hours, odometer readings, kilometers, cycles and more. This feature comes in handy for a variety of reasons such as scheduling equipment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

The screenshot shows the 'Types and Status' tab of the Main Report – Filter Wizard. It contains two main sections: 'Work Order Types' and 'Work Order Status'. The 'Work Order Types' section has a 'Task Type:' dropdown menu currently set to 'All Types'. The 'Work Order Status' section has a 'Status:' dropdown menu currently set to 'All Open'. Red arrows point from the dropdown menus to labels on the right side of the image: 'Work Work Type Assignment selection' for the Task Type dropdown and 'Work Order Status Assignment selection' for the Status dropdown.

- **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:

The screenshot shows the 'Assignments' tab with the following fields and buttons:

Field	Select Button	Use All Button
Classifications: Support Equipment Maintena	Select	Use All
Locations: Support Equipment Room	Select	Use All
Accounts: Use All	Select	Use All
Projects: Time Tracker Project	Select	Use All
Assets/Equipment: 600 PSI High Pressure Air Cc	Select	Use All
Mechanic: Murray, Fred	Select	Use All

Red arrows point to the 'Select' and 'Use All' buttons for each field, with labels: 'Criteria or Matching Assignments Selection' and 'Clears Assignments'.

- 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:

The screenshot shows the 'Dates and Sorting' tab with the following elements:

- Date Range Selection based on Scheduled Start**: A section containing 'Start Date' (6/16/2014) and 'End Date' (6/16/2014) fields, a 'Use All Dates' checkbox, and a 'Date Types' dropdown (Scheduled Start).
- Order By**: A section containing a 'Sorting' dropdown (Subject).

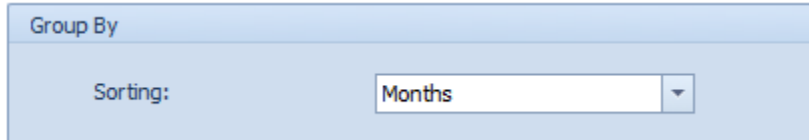
Red arrows point to various elements with labels: 'Date Range Criteria', 'Type of Dates to Use', 'Show All (Ignore Dates)', and 'Sort By Field'.

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.

A screenshot of a software interface showing a 'Group By' section. It contains a 'Sorting:' label and a dropdown menu with 'Months' selected.

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	ASSIGNMENT	
Start Date: 4/9/2013	Asset/Equipment: 600 PSI High Pressure Air Compressor	Requester: Eliot, Gary	Classification:	
Start Time: 8:00 AM	Reference: PSH00001	Manager:	Location: Support Equipment Room	
End Date: 4/12/2013	Serial No: 8871GH99	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	ASSIGNMENT	
Start Date: 5/1/2013	Asset/Equipment: 600 PSI High Pressure Air Compressor	Requester: Eliot, Gary	Classification: Support Equipment Maintenance	
Start Time: 8:00 AM	Reference: PSH00001	Manager:	Location: Support Equipment Room	
End Date: 5/13/2013	Serial No: 8871GH99	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				
SCHEDULING	ASSET - EQUIPMENT	PERSONNEL	ASSIGNMENT	

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 Parts Inventory Report

The **Work Orders Inventory Report** checks the currently selected work order against the inventory database and then reports on parts availability. This comes in handy when you want to check inventory levels to see if all parts that are needed to perform a task are on-hand.

To create a **Work Orders Parts** Inventory 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 **Parts Inventory** 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.

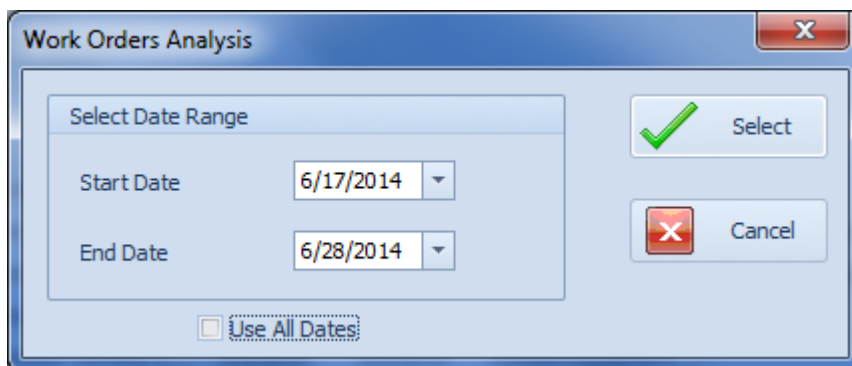
To create the **Down Time Wizard** report:

- 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:

The image shows a software dialog box titled "Work Orders Analysis". It has a standard Windows-style title bar with a close button (X) in the top right corner. The main area of the dialog is light blue and contains a "Select Date Range" section. This section has two date pickers: "Start Date" with the value "6/17/2014" and "End Date" with the value "6/28/2014". Below these pickers is a checkbox labeled "Use All Dates" which is currently unchecked. To the right of the date pickers are two buttons: a "Select" button with a green checkmark icon and a "Cancel" button with a red X icon.

- 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.

The screenshot shows the 'Repair Codes Report' dialog box. It has three main sections: 'Equipment Assignment Selection', 'Repair Code Selection', and 'Completion Date Ranges'.
 - In 'Equipment Assignment Selection', there is a text box containing '600 PSI High Pressure Air Compressor' and a 'Select' button. A red line points from the 'Select' button to the label 'Select the Asset'.
 - In 'Repair Code Selection', there is an empty text box and a 'Select' button. A red line points from the 'Select' button to the label 'Select the Repair Code'. Below this is a checked checkbox labeled 'Include All Codes'. A red line points from this checkbox to the label 'Use All Repair Codes'.
 - In 'Completion Date Ranges', there are two date pickers: 'Start Date' (showing 11/4/2013) and 'End Date' (showing 6/25/2014). A red bracket groups these two pickers, with a line pointing to the label 'Date Range Setup'. Below the date pickers is an unchecked checkbox labeled 'Include All Dates'. A red line points from this checkbox to the label 'Use All Dates'.
 - On the right side of the dialog, there are two buttons: 'Accept' (with a green checkmark icon) and 'Cancel' (with a red X icon). A red line points from the 'Accept' button to the label 'Accept Report Settings'.

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	800 PSI High Presser Air Compressor	Air Compressor Monthly Checks	420.00		483.04	NO
6/16/2014	PSIH00001	800 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:

The screenshot shows a 'Projected Man Hours Report' dialog box with the following sections and annotations:

- Select Date Range:**
 - Start Date: 6/17/2014 (dropdown)
 - End Date: 6/17/2014 (dropdown)
 - ☐ Use All Dates
- Mechanic Assignment Selection:**
 - Murray, Fred (text field)
 - ☐ Use All Mechanics
 - Select button
- Asset - Equipment Selection:**
 - 600 PSI High Pressure Air Compress (text field)
 - ☐ Use All Assets
 - Select button
- Buttons:**
 - Accept (with green checkmark icon)
 - Cancel (with red X icon)

Red annotations with lines pointing to specific elements:

- Accept Wizard Settings:** Points to the 'Accept' button.
- Setup Date Ranges:** Points to the 'Start Date' and 'End Date' dropdowns.
- Use All Dates:** Points to the 'Use All Dates' checkbox.
- Select and Assign an Employee:** Points to the 'Select' button in the Mechanic Assignment Selection section.
- Select and Assign an Asset:** Points to the 'Select' button in the Asset - Equipment Selection section.

- **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
1405-6	Work Order from Issue: 1405-8, 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.

Time Clock Report

The Time Clock Report, reports on time as recorded with the **Time Tracker Routines**.

The following illustrates the elements of the report setup screen:

The screenshot shows the 'Time Card Report' dialog box. It has two main sections: 'Assignments' and 'Date Ranges'. The 'Assignments' section includes buttons for 'Select Employee', 'Select Vendor', 'Select Project', and 'Select Work Order'. Below these are input fields for 'Murray, Fred', 'Gardner and Denver', a dropdown for 'Include All', and a text box for '1101-0'. The 'Date Ranges' section includes 'Start Date' and 'End Date' dropdowns set to '6/17/2014', and an 'Include All Dates' checkbox. At the bottom, there is a 'Group Report By' dropdown set to 'Employee - Date'. A 'Create Report' button is in the top right, and a 'Cancel' button is in the bottom right. Red lines and boxes highlight specific elements, with labels on the right side: 'Accept Report Criteria and Create Report' points to the 'Create Report' button; 'Assignments Lookup Buttons' points to the 'Select Employee', 'Select Vendor', 'Select Project', and 'Select Work Order' buttons; 'Ignore Assignment and Include All' points to the 'Include All' checkbox; 'Assigned Work Order Details' points to the '1101-0' text box; 'Report Date Range' points to the 'Start Date' and 'End Date' dropdowns; 'Use All Available Dates' points to the 'Include All Dates' checkbox; and 'Group By Options' points to the 'Group Report By' dropdown.

To create a **Time Card Report**:

- Move to the **Reports** tab in the ribbon and expand the **Labor Time** option.
- Click on the **Time Card Reports** option.
- Move to the **Assignments** Group and setup the assignments criteria to base your report on. This is done by:
 - Clicking on one or more of the **Select ...** buttons available.
 - From the invoked dialog, move to the grid and select the record you want to use.
 - Click on the **Select** button.
- Move to the **Date Ranges** group and setup the **Start Date** and **End Date** for your report date range.
- To use all dates insure that **Include All Dates** checkbox is checked.
- To set up how you would like the report grouped, select one of the available option in the **Group Report By** drop down list.
- Click on the **Create Report** button to run the report.

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	\$487.63				\$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

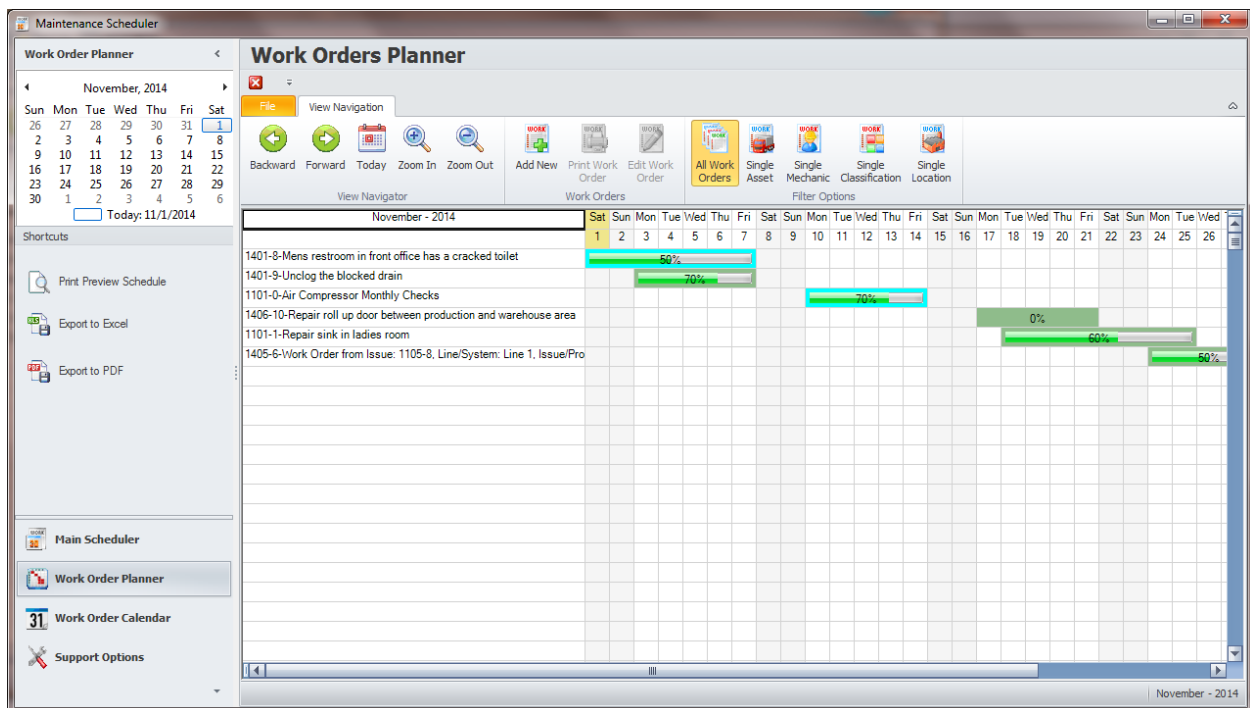
This report returns information on work orders that still have a status of 'Work Request'.

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.

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**.

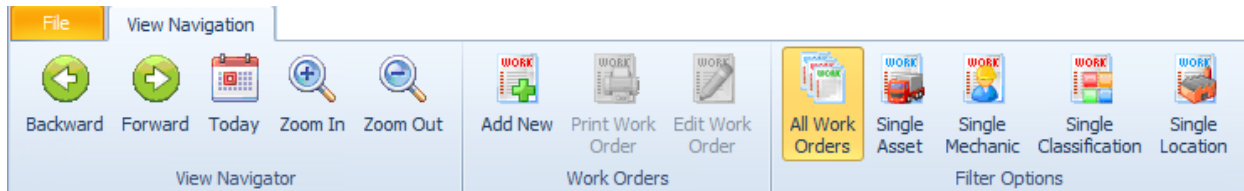
Or

- 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.

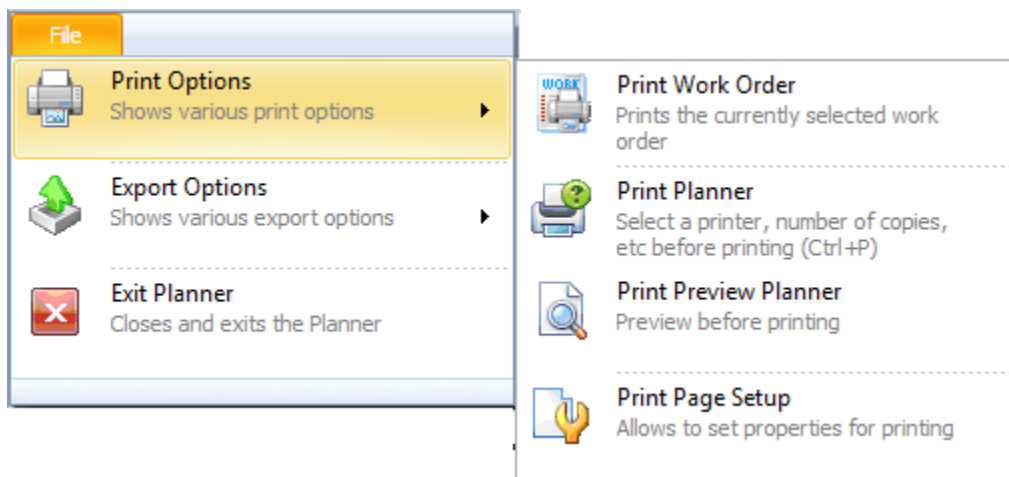
Planner - Printing a Work Order

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

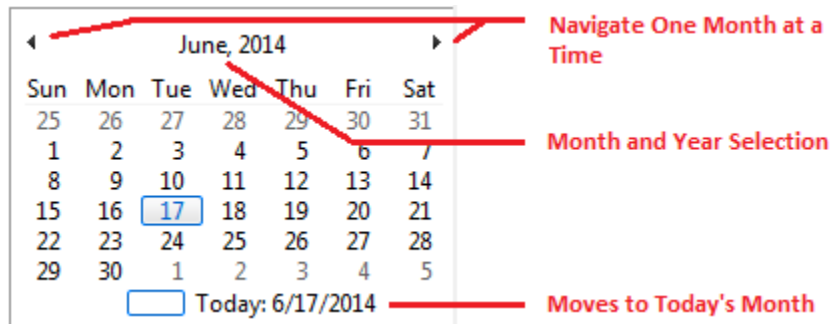
To navigate through the Work Order Planner using the ribbon control:

- **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**.

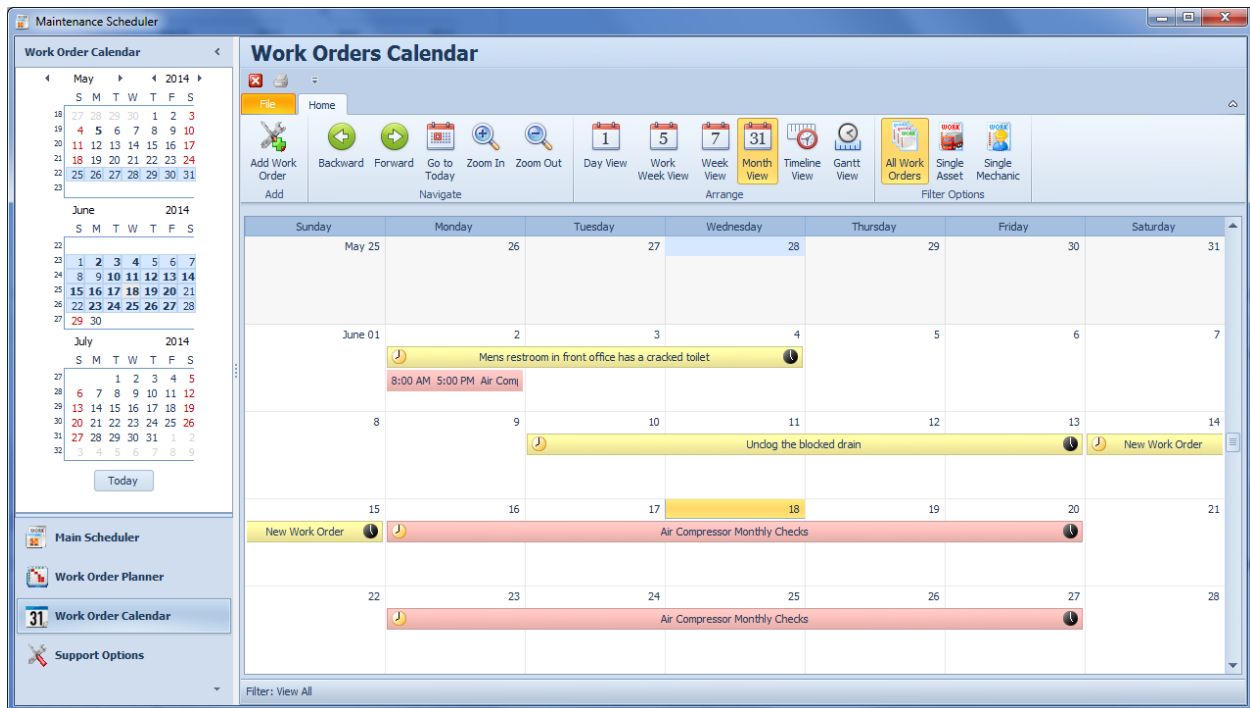
The following illustrates the main elements of this calendar:



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

Work Order Calendar

Everyone is different, and we all have our own preferences on how we like to do things, for this reason we have added the **Work Order Calendar** to our list of Work Order management tools. With this option you can create and edit tasks, view tasks in day, week, work week and month views. Gantt and Time Line view are also available.



To access the *Work Order Calendar*:

- 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 Calendar**.

Or

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

Calendar View Options

The Work Orders Calendar provides for the following view options:

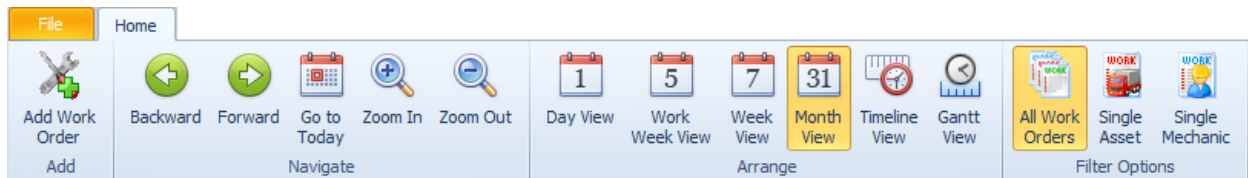
- **Day View** - This view provides the most detailed view of work orders for a certain day(s).
- **Work Week View** - This view displays work orders for the working days in a particular week.
- **Week View** - This view displays work orders for any given week.

- **Month View** - The month view is the least detailed of the views, and is designed to allow browsing and long-term plan analysis. This view positions the days one after another horizontally, so that they form weeks, while weeks are placed one under the other.
- **Timeline View** - This view plots work orders as horizontal bars along the timescales, and provides a clearer overview for scheduling purposes.
- **Gantt View** – Currently works in the same manner as the Time Line View above, but also shows the percentage of work order completion.

WO Calendar – Ribbon

The **Work Order Calendar** 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 **Calendar's** ribbon:

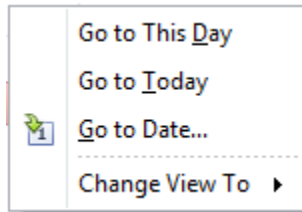


The following are the elements on the **Home** ribbon tab, reading left to right:

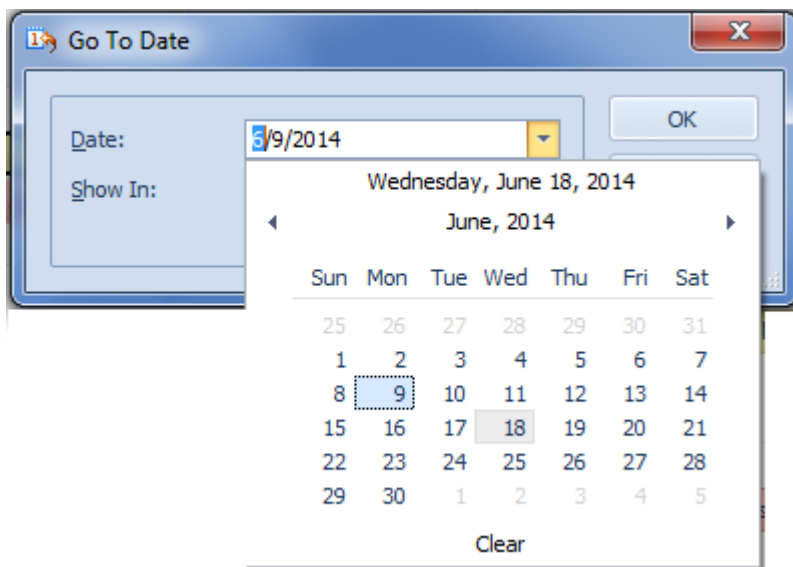
- **Add Work Order** – Invokes the **Work Order Wizard** that will allow you to create a new work order. Please refer to the **Work Order Wizard** section of this chapter on to use this wizard.
- **Backward** – Navigates with the current view backwards in time.
- **Forward** – Navigates with the current view forwards in time.
- **Go To Today** – Navigates with the current view to show today's schedule.
- **Zoom In** - You can zoom in the scheduler view to display its content in greater detail, or zoom out for a more general view. Zooming is implemented by adjusting the time scales (in the Day, Work-Week or Timeline views) or changing the number of visible weeks (in the Month view).
- **Zoom Out** – See Zoom in above.
- **Arrange Group** – Please refer to the **Calendar View Options** section for options available here.
- **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 you 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 you 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.

Calendar Pop Up (Context) Menu

Right-clicking within the main area of the calendar opens the context menu, which contains items for navigating through dates.



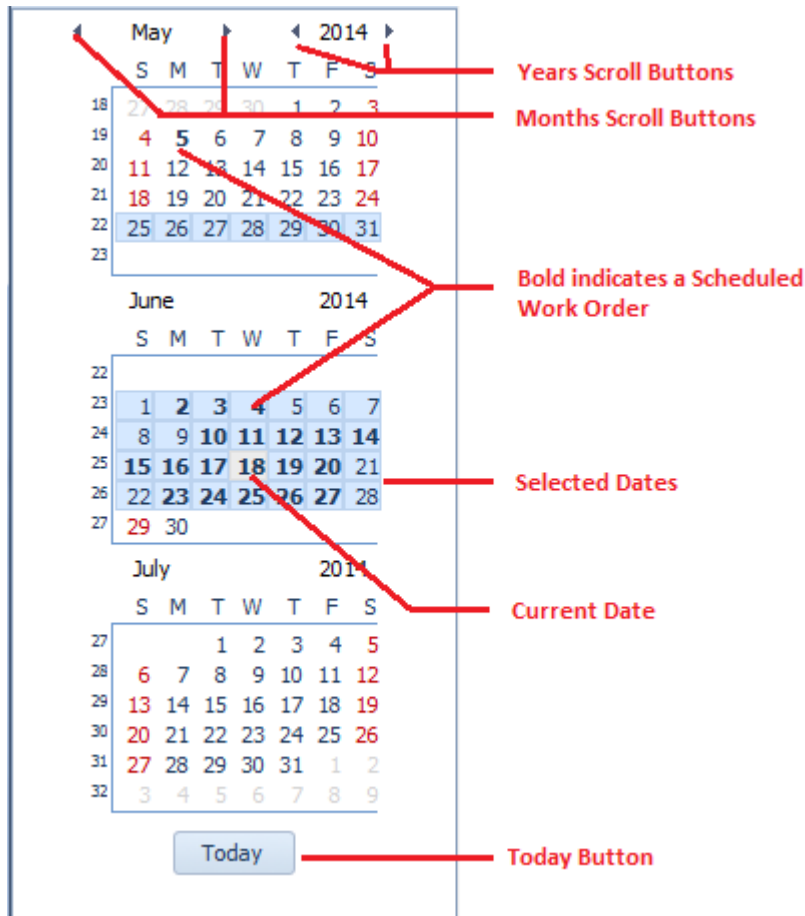
- **Go to This Day** - Only available in the **Week View** and **Month View** modes. This item is active when only one day is selected, and when activated, displays the target day in the **Day View** mode.
- **Go to Today** - Moves focus to the current date, preserving the existing view mode.
- **Go to Date** - Invokes the **Go To Date** dialog to select the date and view type. The date can be selected either by using the calendar or by entering a string with the placeholders. To select the desired view type, use the **Show In** drop-down box.



Calendar Date Navigator

The calendar is accompanied by the **date navigator**. Use it to navigate through dates. This **Date Navigator** is located in navigational bar on the left side of the screen, and is only visible when the **Work Order Calendar** is in use.

The following illustrates the elements of the date navigator.



You can select either a particular date, or a range of dates in the date navigator, and the scheduler will display your selection using a **Day View**. The table below details how you can select dates in different ways.

Action	Effect
Click a date	A single date is selected and the scheduler displays it using the Day View . If the currently active view is of another type, it is automatically changed to Day View .
Click and drag across multiple dates --or-- click a start date, hold down the SHIFT key and click an end date	The continuous range of dates is selected. The scheduler displays it using the Day View , irrespective of the size of the selected range.
Hold down the CTRL key and click several dates	A set of dates is selected. The scheduler displays it using the Day View , irrespective of the size of the selected range.
Click a week number	A corresponding week-long range is selected. The scheduler displays it using the Day View .

Calendar - Editing a Work Order

To edit a work order from within the **Calendar**:

- Double click on the work order you want to edit.
- Please refer to the **Work Order Wizard** section in this chapter on how to use the invoked wizard.

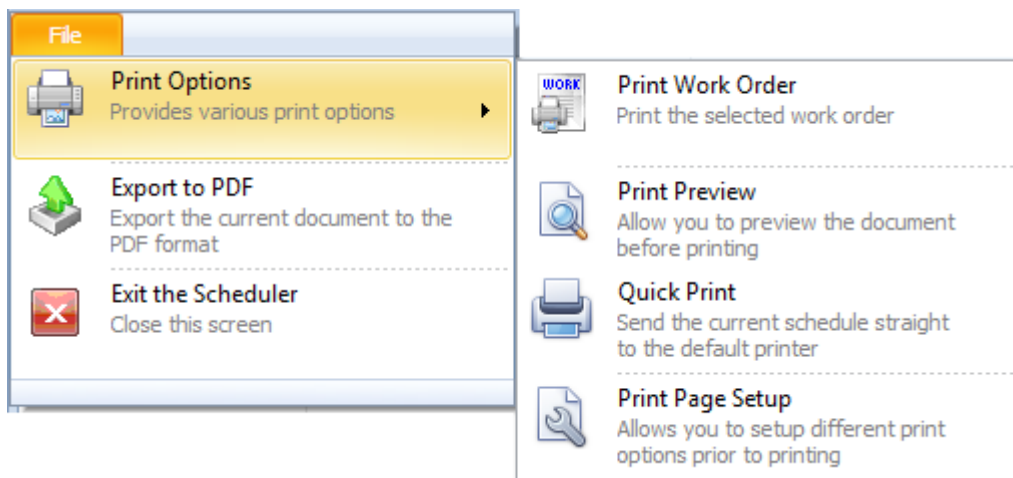
Calendar - Printing a Work Order

To print a work order from the **Calendar**:

- Select the work order from those displayed in the Work Order Planner.
- Open the **File** menu and expand the **Print Options** sub menu.
- Click on the **Print Work Order** option.

Printing the Work Order Calendar

To print the **Work Order Calendar'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 Calendar

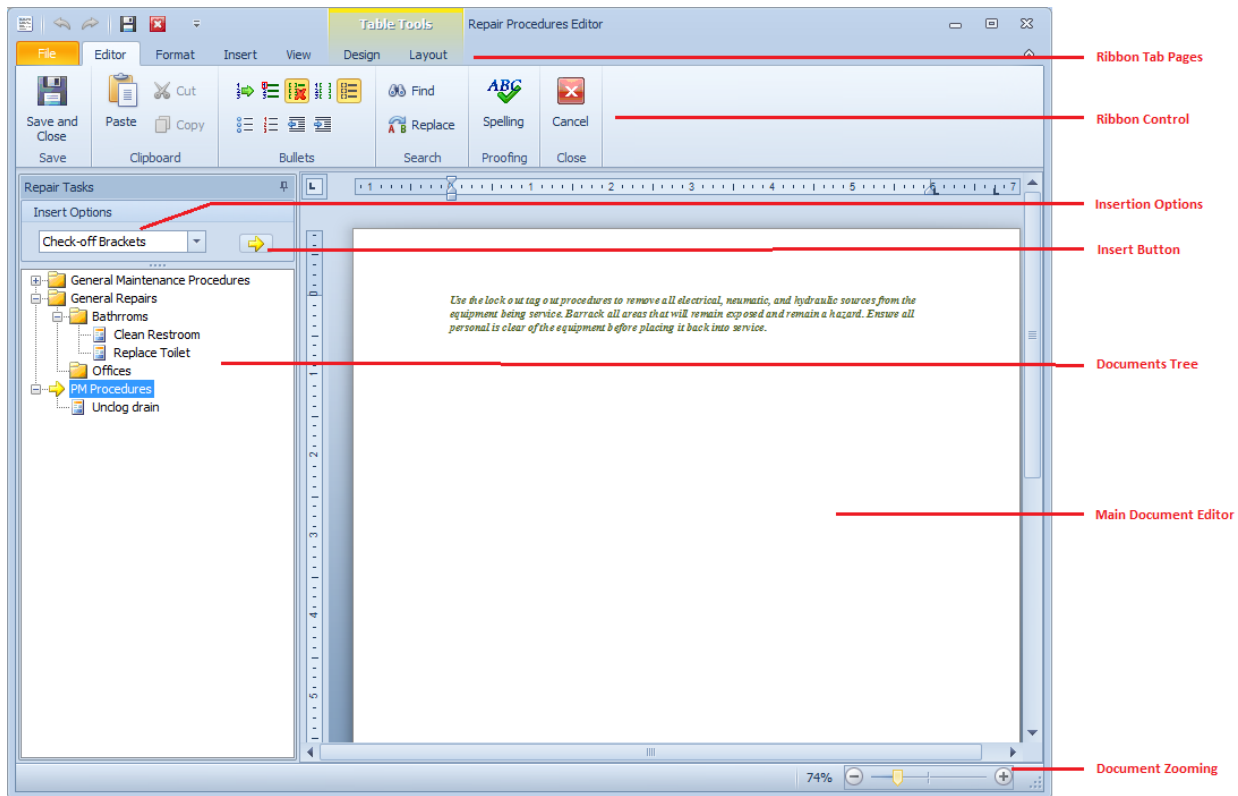
You can export the current calendar document to the PDF file type.

- Select the Month that you want to export.
- Open the **File** menu and click on the **Export to PDF** option.
- Type in a file name in the space provided and click **Save**.

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**:

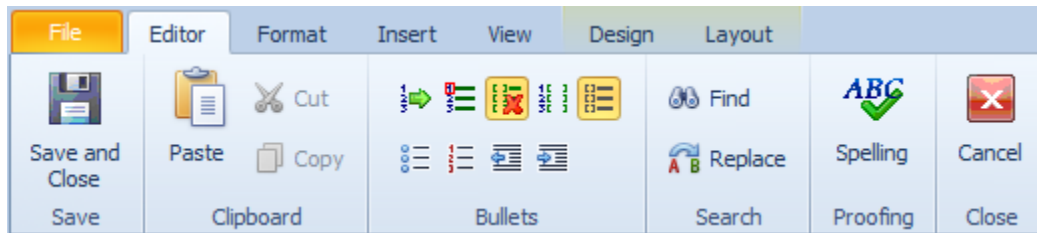


With the exception of the ribbon's **Editor** tab, this editor employs many of the same features of the word processor we use throughout the application. Because it has so many shared features, we would like to refer you to the chapter on the [Rich Text Editor](#) to learn how to use these shared features.

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

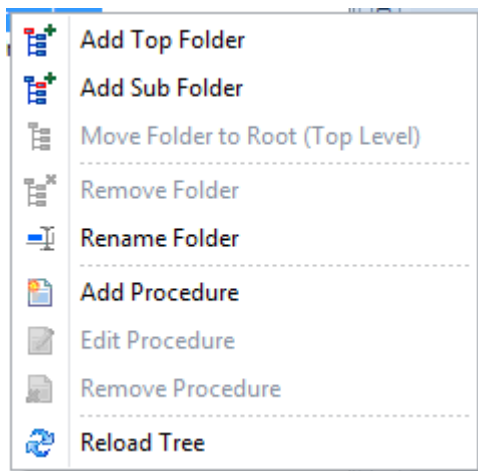
The **Procedures Database** part of the **Repair Procedures Editor** allows you to create a database of common tasks procedures. These procedures would be reusable, and could relate to both repair and recurring work order types.

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.

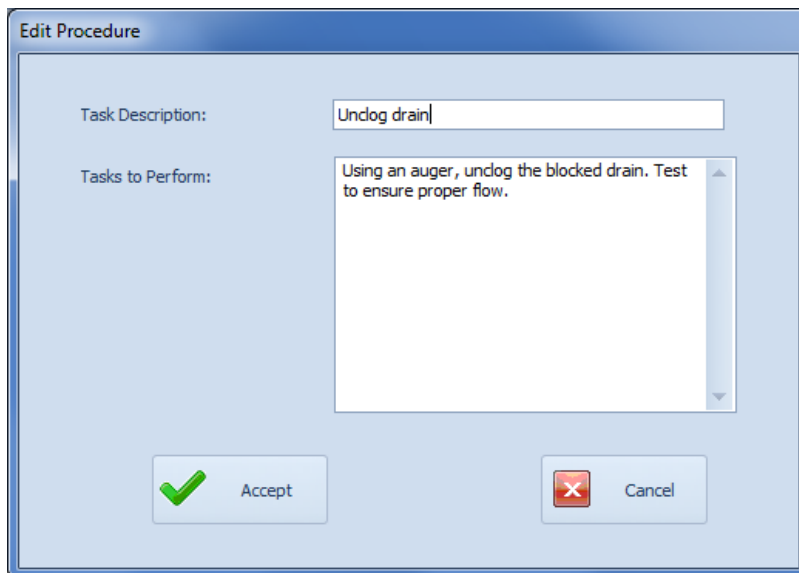
The following illustrates the popup menu that is accessible by right mouse clicking on various elements of the **Documents Tree**.



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 in 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.

Maintenance Budgets

The **Maintenance Scheduler** support creating and maintaining budgets as they related to maintenance operations. **Budget** can be based on either **Accounts** or **Projects**.

To access the **Maintenance Budgets**:

- From the **Main Scheduler**, move to the **Go** tab in the ribbon and click on the **Budgets** option.

Or

- Expand the **Support Options** group in the Outlook styled Shortcut bar located on the left side of the screen.
- Click on the **Maintenance Budgets** button.

Please refer to the **Budgets** section of the **Common Features** chapter on how to use this feature.

Maintenance Documents

The **Maintenance Scheduler** supports its own **Documents database**. These documents can be attachments or links, use the built in Rich Text Editor or store pictures and images.

To access the **Maintenance Documents**:

- From the **Main Scheduler**, move to the **Go** tab in the ribbon and click on the **Maintenance Documents** option.

Or

- Expand the **Support Options** group in the Outlook styled Shortcut bar located on the left side of the screen.
- Click on the **Maintenance Documents** button.

Please refer to the **Documents Database** section of the **Common Features** chapter on how to use this feature.

Email Composer

The **Maintenance Scheduler** supports the creation and sending of email messages.

To access the **Email Composer**:

- From the **Main Scheduler**, move to the **Go** tab in the ribbon and click on the **E-Mail Composer** option.

Or

- Expand the **Support Options** group in the Outlook styled Shortcut bar located on the left side of the screen.
- Click on the **E-Mail Composer** button.

Please refer to the **Email Composer** section of the **Common Features** chapter on how to use this feature.

Mechanics Database

The **Maintenance Scheduler** allows access to the **employees' database** where you can both create and edit basic information.

To access the **Mechanics/Employees database**:

- From the **Main Scheduler**, move to the **Go** tab in the ribbon and click on the **Mechanics Database** option.

Or

- Expand the **Support Options** group in the Outlook styled Shortcut bar located on the left side of the screen.
- Click on the **Mechanics and Employees** button.

Please refer to the **Lookup Dialog Screens** section of the **Common Features** chapter on how to use this feature.

Inventory Database

The **Maintenance Scheduler** allows access to the **Parts and Inventory database** where you can both create and edit basic information.

To access the **Parts and Inventory database**:

- From the **Main Scheduler**, move to the **Go** tab in the ribbon and click on the **Inventory Database** option.

Or

- Expand the **Support Options** group in the Outlook styled Shortcut bar located on the left side of the screen.
- Click on the **Parts and Inventory** button.

Please refer to the **Lookup Dialog Screens** section of the **Common Features** chapter on how to use this feature.

Equipment and Asset Database

The **Maintenance Scheduler** allows access to the **Equipment and Assets database** where you can both create and edit basic information.

To access the **Equipment and Assets database**:

- From the **Main Scheduler**, move to the **Go** tab in the ribbon and click on the **Assets Database** option.

Or

- Expand the **Support Options** group in the Outlook styled Shortcut bar located on the left side of the screen.

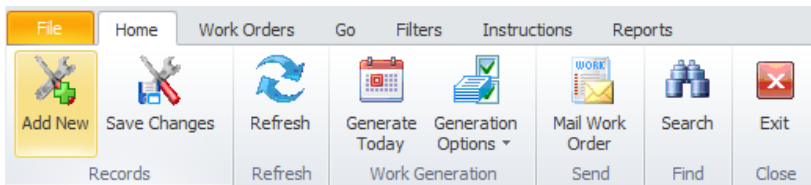
- Click on the **Equipment and Assets** button.

Please refer to the **Lookup Dialog Screens** section of the **Common Features** chapter on how to use this feature.

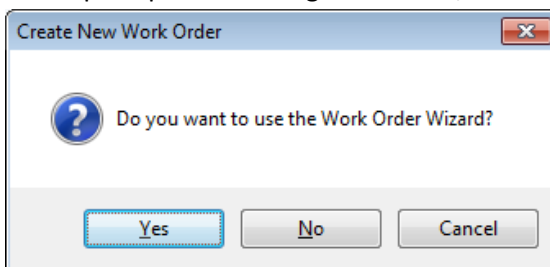
Creating a PM (Recurring) Work Order with Creation Wizard

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

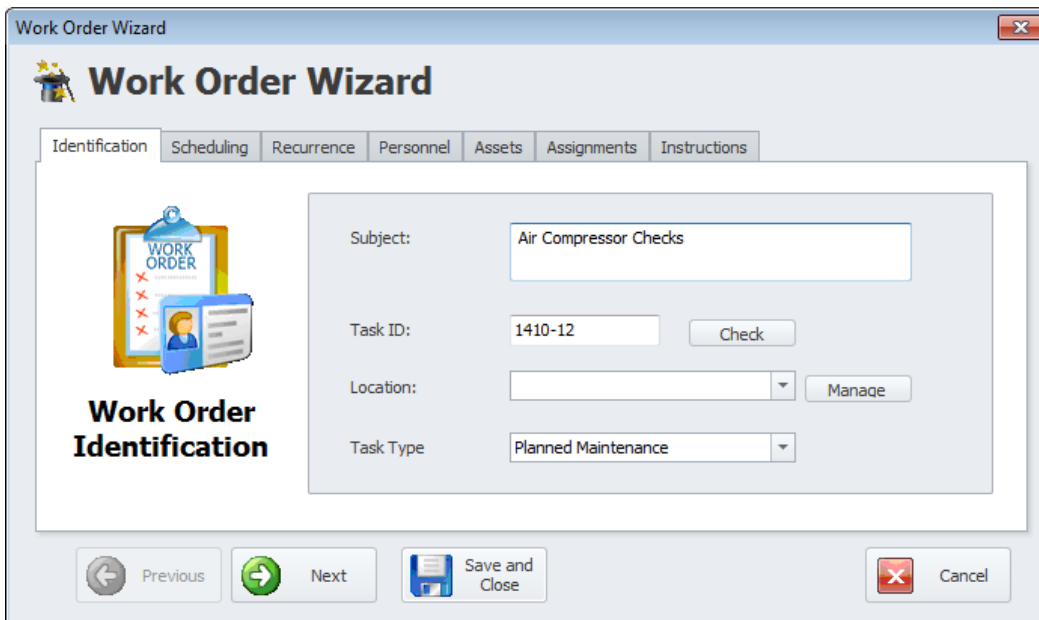
- Move to the ribbon and click on the **Add New** option.



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

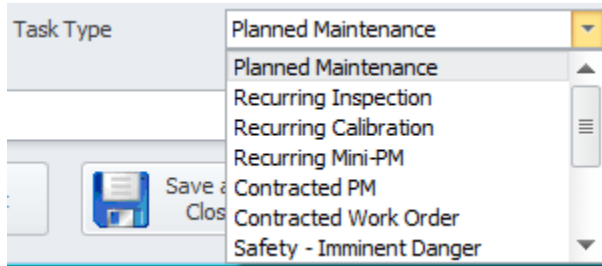


- From the invoked **Work Order Wizard**, move to the **Identification** tab.



- 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.

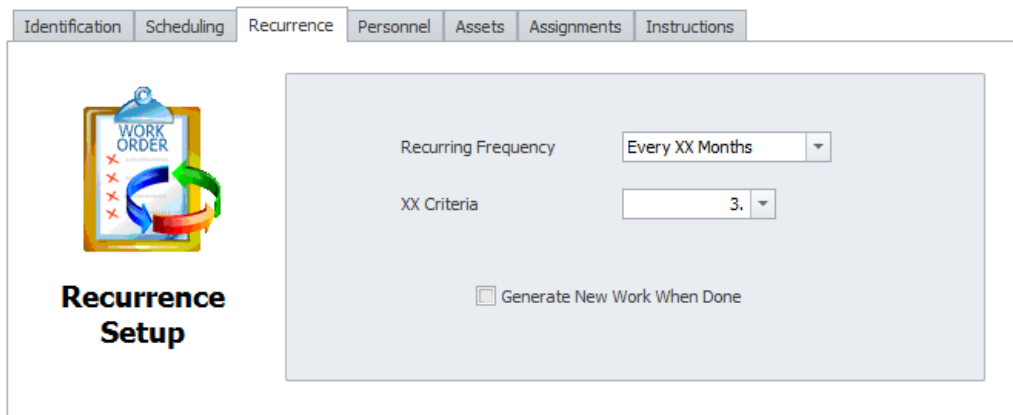


There are 12 possible task types available, with 10 of these having user definable titles. Five of these task types are designated as recurring types of work orders, where the others are designated as repair, or one-time work orders types. See the [Work Orders Setup](#) section in this chapter for more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



The screenshot shows the 'Recurrence' tab of a software interface. On the left is an icon of a clipboard with a 'WORK ORDER' label and a circular arrow. Below it is the text 'Recurrence Setup'. The main area contains a 'Recurring Frequency' dropdown menu set to 'Every XX Months'. Below that is an 'XX Criteria' input field with the value '3.' and a small dropdown arrow. At the bottom is a checkbox labeled 'Generate New Work When Done' which is currently unchecked.

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.

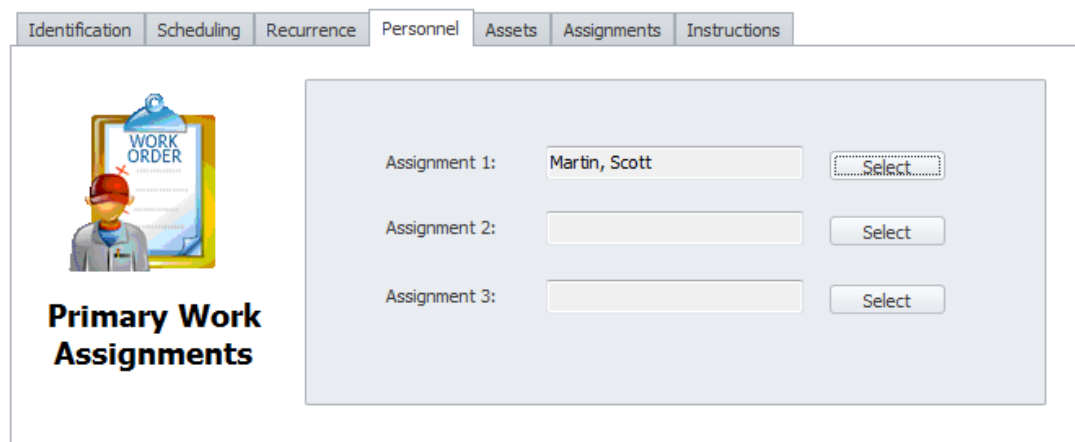
*The value entered here replaces the 'XX' criteria of the selected frequency. For example, if you have a Frequency of 'Every XX Meters' selected, and you enter '3000' for the **XX Criteria**, the work order would regenerate 'Every 3000 Meters'.*

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 unchecked, 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.

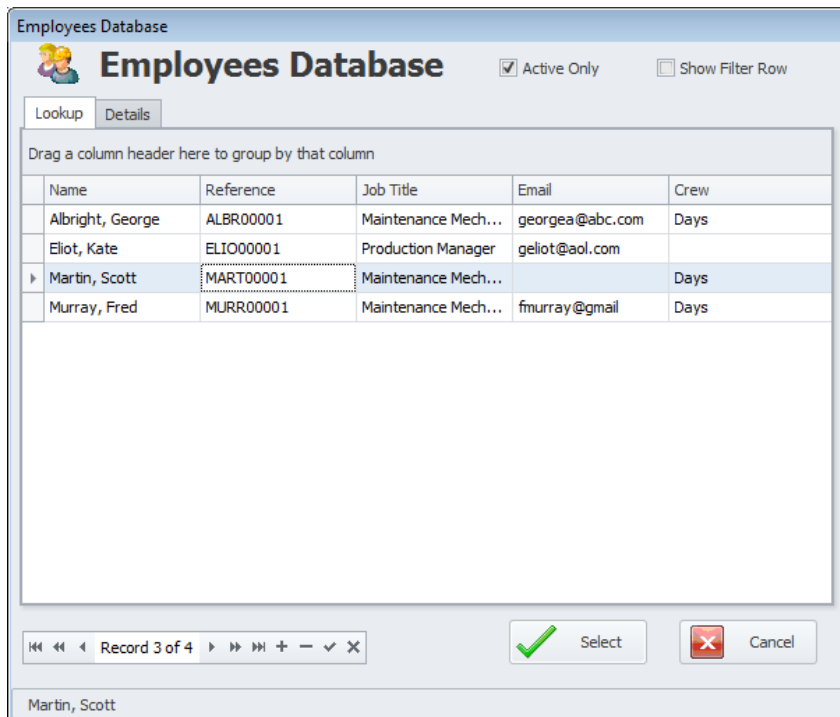
This tab allows you to assign personnel or mechanics to the work order.



The screenshot shows the 'Personnel' tab of the software interface. On the left is an icon of a person wearing a hard hat and a 'WORK ORDER' label. Below it is the text 'Primary Work Assignments'. The main area contains three rows for assignments. 'Assignment 1' has a text box with 'Martin, Scott' and a 'Select' button. 'Assignment 2' and 'Assignment 3' each have empty text boxes and 'Select' buttons.

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.



Employees Database ☒ Active Only ☐ Show Filter Row

Lookup Details

Drag a column header here to group by that column

Name	Reference	Job Title	Email	Crew
Albright, George	ALBR00001	Maintenance Mech...	georgea@abc.com	Days
Eliot, Kate	ELIO00001	Production Manager	geliot@aol.com	
▶ Martin, Scott	MART00001	Maintenance Mech...		Days
Murray, Fred	MURR00001	Maintenance Mech...	fmurray@gmail	Days

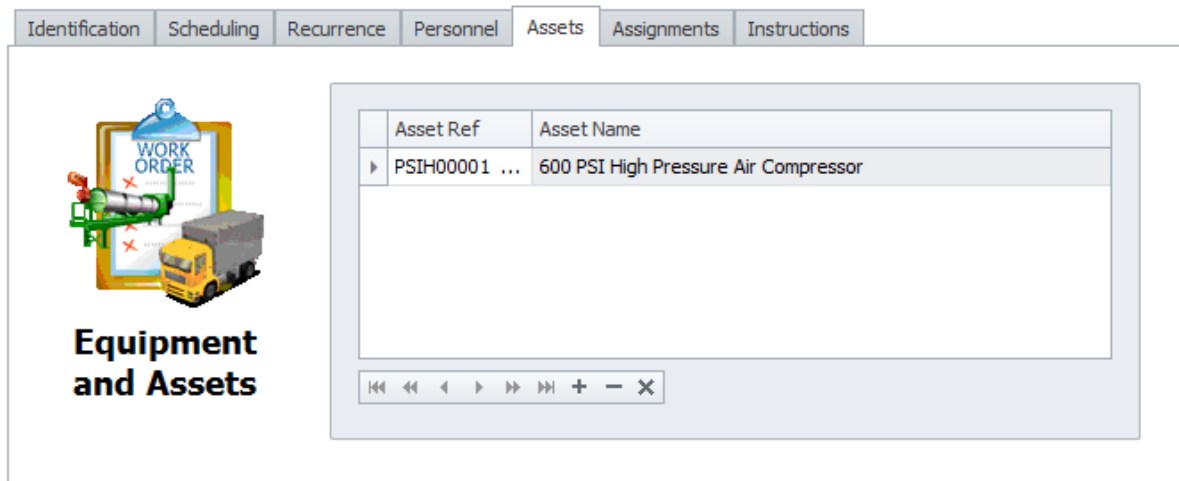
Record 3 of 4

Select Cancel

Martin, Scott

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.



Identification Scheduling Recurrence Personnel **Assets** Assignments Instructions

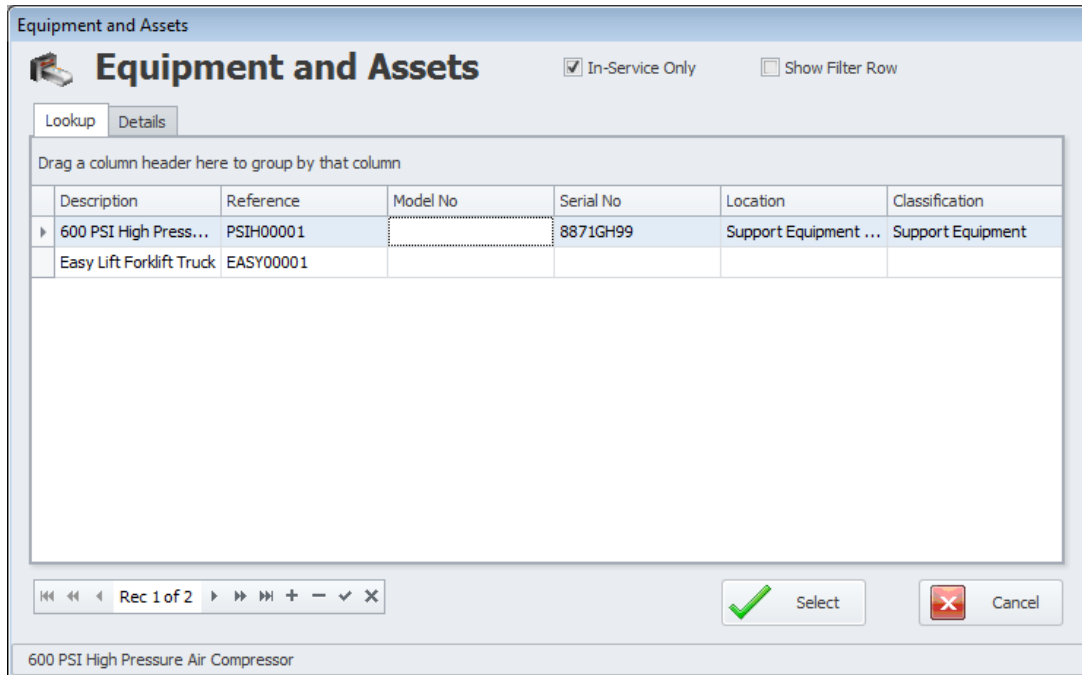
Equipment and Assets

Asset Ref	Asset Name
▶ PSIH00001 ...	600 PSI High Pressure Air Compressor

Record 1 of 1

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.



The dialog box is titled "Equipment and Assets". It has a "Lookup" tab selected and a "Details" tab. There are checkboxes for "In-Service Only" (checked) and "Show Filter Row". Below the tabs is a grid with the following data:

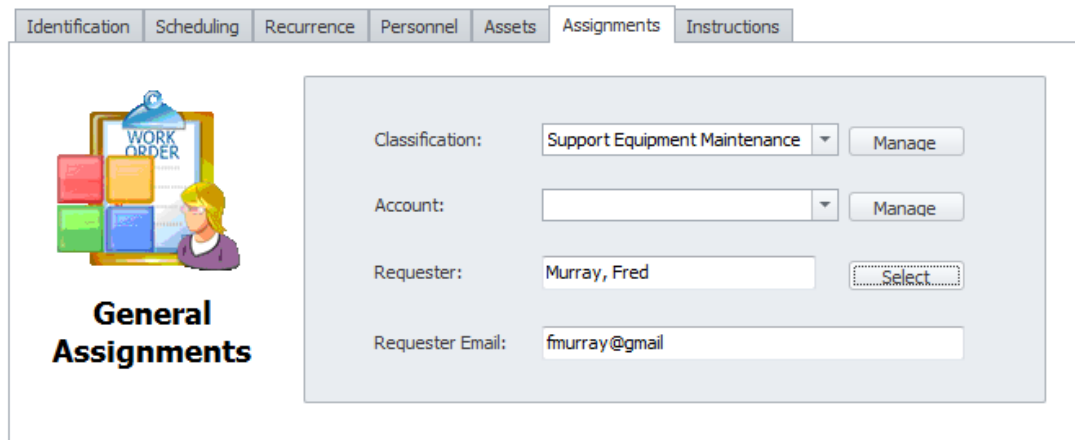
Description	Reference	Model No	Serial No	Location	Classification
600 PSI High Press...	PSIH00001		8871GH99	Support Equipment ...	Support Equipment
Easy Lift Forklift Truck	EASY00001				

At the bottom of the dialog, there is a status bar showing "600 PSI High Pressure Air Compressor". Navigation buttons include "Rec 1 of 2", "Select" (with a green checkmark), and "Cancel" (with a red X).

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.



The "Assignments" tab is active. It features a "General Assignments" section with a "WORK ORDER" icon and a "General Assignments" title. The form fields are as follows:

- Classification:** Support Equipment Maintenance (dropdown menu) with a "Manage" button.
- Account:** (empty dropdown menu) with a "Manage" button.
- Requester:** Murray, Fred (text field) with a "Select" button.
- Requester Email:** fmurray@gmail (text field).

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.

Employees Database

Active Only Show Filter Row

Lookup Details

Drag a column header here to group by that column

Name	Reference	Job Title	Email	Crew
Albright, George	ALBR00001	Maintenance Mech...	georgea@abc.com	Days
Eliot, Kate	ELIO00001	Production Manager	geliot@aol.com	
▶ Martin, Scott	MART00001	Maintenance Mech...		Days
Murray, Fred	MURR00001	Maintenance Mech...	fmurray@gmail	Days

Record 3 of 4

Select Cancel

Martin, Scott

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.

Identification Scheduling Recurrence Personnel Assets Assignments Instructions

Work Order Instructions

Safety Instructions

Select Edit Standard Safety Instructions

Work Instructions

Title

▶ Servicing Electrical Panels

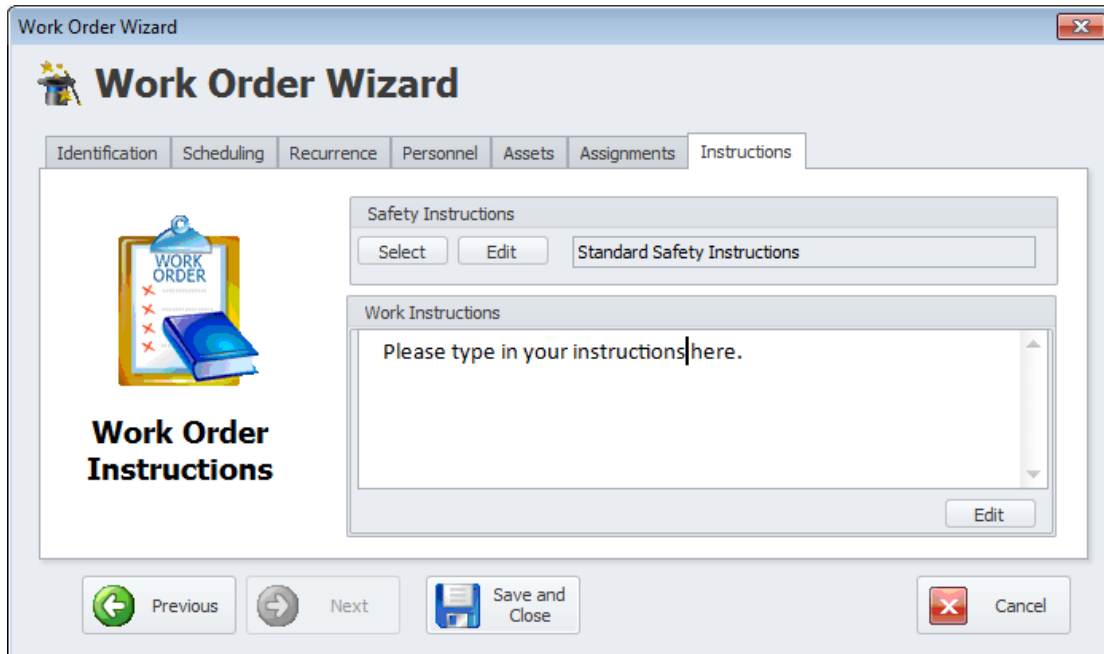
View - Edit

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.

36. For One-Time, non-recurring work orders, move to the Editor found in the **Work Instructions** group, and type in your instructions.



The screenshot shows the 'Work Order Wizard' window with the 'Instructions' tab selected. The window has a title bar 'Work Order Wizard' and a close button. Below the title bar is a tabbed interface with tabs for 'Identification', 'Scheduling', 'Recurrence', 'Personnel', 'Assets', 'Assignments', and 'Instructions'. The 'Instructions' tab is active, displaying a 'Work Order Instructions' section on the left with a clipboard icon and the text 'Work Order Instructions'. To the right, there are two main sections: 'Safety Instructions' and 'Work Instructions'. The 'Safety Instructions' section has 'Select' and 'Edit' buttons and a text field containing 'Standard Safety Instructions'. The 'Work Instructions' section has a large text area with the placeholder text 'Please type in your instructions here.' and an 'Edit' button at the bottom right. At the bottom of the window, there are four buttons: 'Previous' (with a left arrow), 'Next' (with a right arrow), 'Save and Close' (with a floppy disk icon), and 'Cancel' (with a red X icon).

37. Click on the Wizard's **Save and Close** button to save and create the work order.

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.

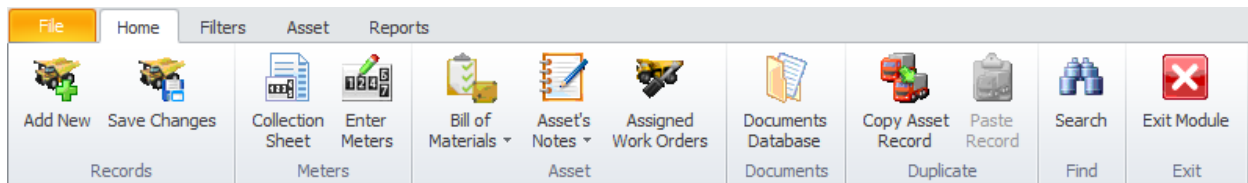
The screenshot displays the 'Equipment and Assets' module interface. The top ribbon includes tabs for File, Home, Filters, Asset, and Reports. The 'Asset' tab is active, showing a ribbon with icons for Add New, Save Changes, Collection Sheet, Enter Meters, Bill of Materials, Asset's Notes, Assigned Work Orders, Documents Database, Copy Asset Record, Paste Record, Search, and Exit Module. Below the ribbon, there are sections for Shortcuts, Quick Filters, and a main data entry area. The main area is divided into several sections: Identification (Reference ID: PSIH00001, Description: 600 PSI High Pressure Air Compressor, Manufacturer: Gardner and Denver, Model No: 8871GH99, Serial No: 8871GH99), General (Meter Value: 100, Meter Type: Hours, Service Date, Safety Instructions: Standard Safety Instructions, Vendor: Gardner and Denver, Special Field: This is a special field), Assignments (Classification: Support Equipment, Account, Assigned To: Martin, Scott), Location (Location: Support Equipment Room, Building, Room), Ownership - Leasing (Ownership: Leased, Company: ADV Equipment Rentals, Lease Start: 6/25/2010, Lease End: 6/30/2014), and Warranty Information (Warranty Start, Warranty End, Warranty Info). The bottom status bar shows '600 PSI High Pressure Air Compressor' and 'Record 1 of 3'.

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.

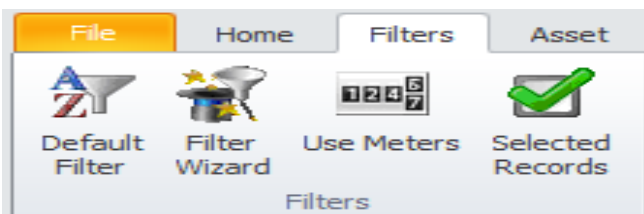
HOME TAB



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.
- **Bill of Materials** – Invokes the **Asset's Bill of Materials** list, where you can both view the current record's spare parts lists.
 - **Primary Asset's Material List** – Provides access to the selected asset's materials list.
 - **Sub-Assembly Material List** – Provides access to the selected sub-assembly's materials list.
- **Asset's Notes** – Uses the built-in word processor to maintain detailed notes on each asset.
 - **Primary Asset's Notes**
 - **Sub-Assembly Notes**
- **Assigned Work Orders** – Allows the viewing and printing of open work orders assigned to the current asset.
- **Documents Database** - Invokes the Documents Database routines as it related to the Assets database and discussed in the **Common Features** chapter.
- **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

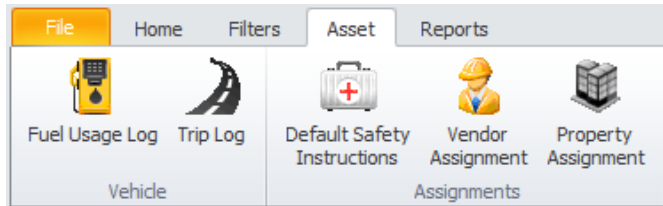


The following are the elements on the **Filters** ribbon tab, reading left to right:

- **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.

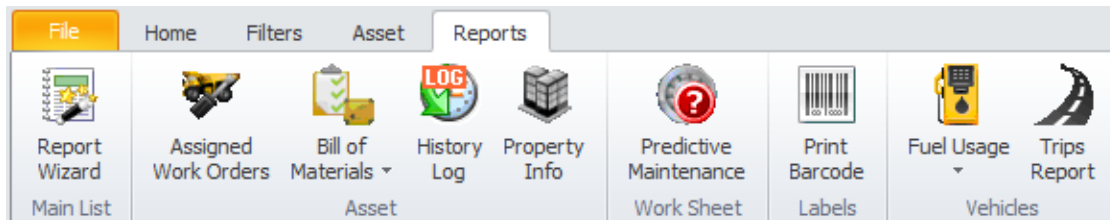
ASSET TAB



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

- **Fuel Usage Log** – Allows you to track the fuel usage as it applies to the current asset.
- **Trip Log** – Allows you to track a vehicle usage on trips taken.
- **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.
- **Vendor Assignment** – Allow you to assign a vendor to this 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.
- **Bill of Materials** – Prints the Bill of Materials list for the selected item in the form of an inventory list.
 - **Primary Asset Bill of Materials**
 - **Sub-Assembly Bill of Materials**
- **History Log** – Prints a date range of log entries as it applies to the current asset.
- **Predictive Maintenance** – Uses a wizard in the creation of a predictive maintenance worksheet type report.
- **Print Barcode** – Invokes the barcode label printing routines.
- **Fuel Usage** – Reports on Fuel Usage for a given date range.

- **Current Asset**
- **All Assets**
- **Trip Reports** - Invokes a wizard in the creation of vehicle trip reports.

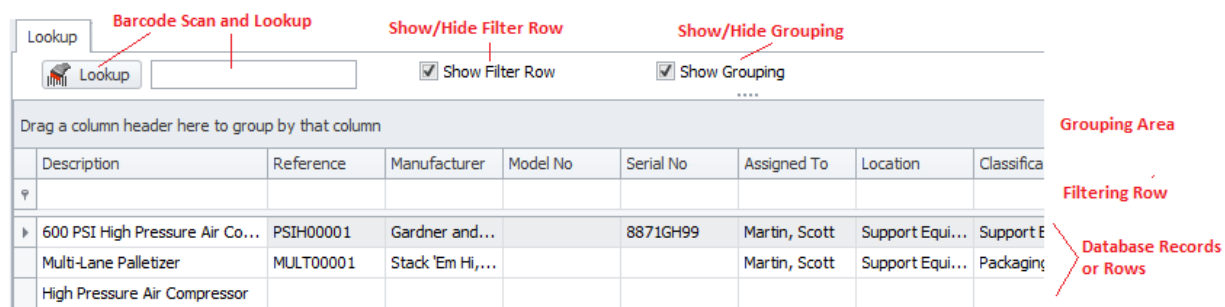
Features of the Equipment and Assets Module

There are many features of the **Equipment and Assets** 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 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. 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 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:

The screenshot shows the 'Identification' form with the following fields and buttons:

- Reference ID:** Text field containing 'PSIH00001'. Label: **Reference Identification**.
- Auto:** Button. Label: **Auto Reference ID**.
- Check:** Button. Label: **Check Reference is Unique**.
- Description:** Text field containing '600 PSI High Pressure Air Compressor'. Label: **Asset's Description**.
- Manufacturer:** Dropdown menu showing 'Gardner and Denver'. Label: **Manufacturer Assignment**.
- Manage:** Button. Label: **Manage Manufacturers List**.
- Model No:** Text field. Label: **Mfg Model Number**.
- Asset No:** Text field. Label: **Asset Number**.
- Serial No:** Text field containing '8871GH99'. Label: **Serial Number**.
- In-Service:** Checkbox. Label: **In-Service Indicator**.
- Selected:** Checkbox. Label: **Record Selection**.

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:

The screenshot shows the 'General' section of the application interface. Red lines and text annotations point to specific elements:

- Current Meter Value:** Points to the 'Meter Value' input field, which contains the number '100'.
- Meter Type Used:** Points to the 'Meter Type' dropdown menu, which is currently set to 'Hours'.
- Indicates the use of Meters:** Points to the 'Use Meters' checkbox, which is checked.
- Asset's Service Date:** Points to the 'Service Date' dropdown menu.
- Invokes Assignment Dialogs:** Points to the 'Lookup' button next to the 'Safety Instructions' field.
- General Assignment Fields:** Points to the 'Lookup' and 'Manage' buttons next to the 'Vendor' and 'Special Field' fields.

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 allows you to assign a default vendor to the current asset. To assign a vendor:

- 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.

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:

Assignments

Classification	Support Equipment	▼	Manage
Account		▼	Manage
Assigned To	Martin, Scott	...	Lookup

Asset Assignment Fields

Manage Lists

Employee Lookup

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:

Location

Location: Support Equipment Room

Building:

Room:

Manage

Manage

Manage

General Location Assignments

Manage Lists

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 - Leasing

Ownership: Leased

Company: ADV Equipment Rentals

Lease Start: 6/25/2010

Lease End: 6/30/2014

Manage

Ownership Indicator

Company Assignment

Manage Companies

Lease Start and End Dates

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:

The screenshot shows a form titled "Warranty Information". It contains two date fields: "Warranty Start" and "Warranty End", each with a dropdown arrow. A red line points from the text "Warranty Start and End Dates" to these two fields. Below these fields is a large text area labeled "Warranty Info". A red line points from the text "Record General Warranty Information here" to this text area.

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/Scrapped.

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.

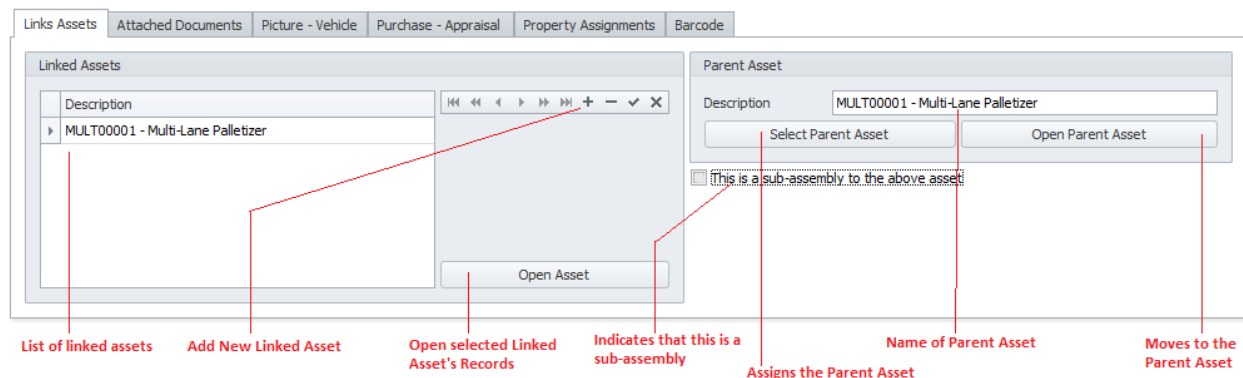
Sales Price

This field would indicate any monies collected in the disposal 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:

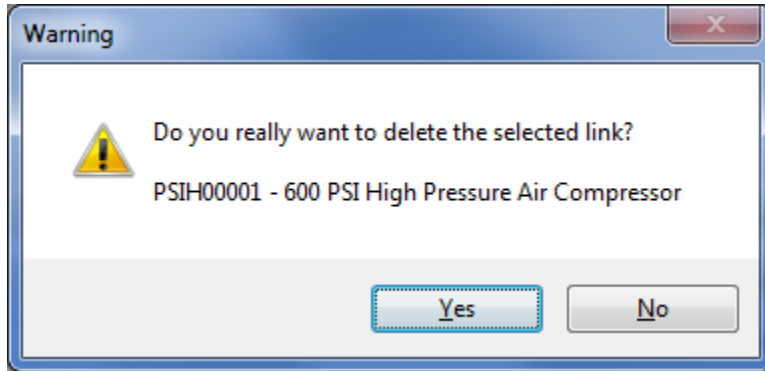


To add Linked Assets

- 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.

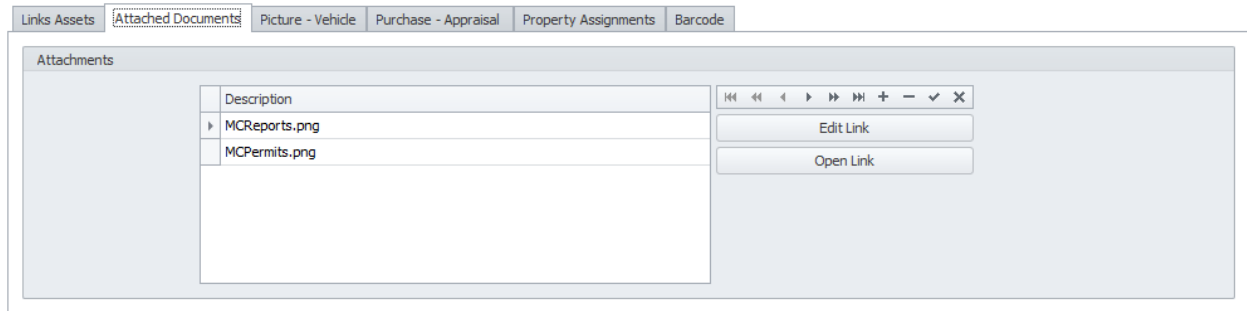
To set the current asset as a Sub-Assembly

- 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.

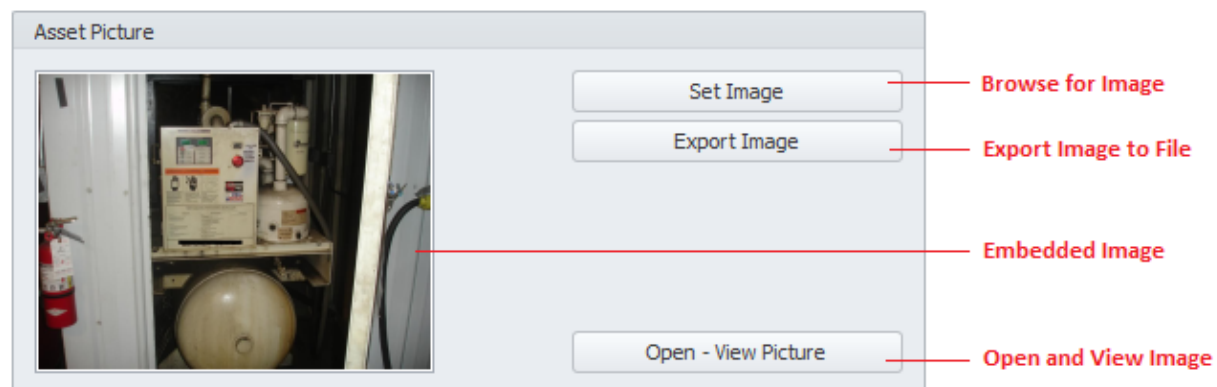
Asset's Picture

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:

The screenshot shows a form titled "Vehicle Information" with a collapse icon (upward arrow) on the left. The form contains several input fields and a text area, with red lines pointing to specific fields from labels on the right:

- Model Year**: Points to the "Vehicle Year" input field.
- State Licensed With**: Points to the "State Licensed" input field.
- License Renewal Date**: Points to the "Renewal Date" input field.
- Vehicle License**: Points to the "Vehicle License" input field.
- Plate Number**: Points to the "Plate No" input field.
- Notes**: Points to the "Vehicle Notes" text area.

- **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:

The screenshot shows a 'Purchase Information' form with the following fields and labels:

Field	Value	Label
Purchase Type	New	Purchase Type
Purchase Date	4/3/2012	Date of Purchase
Purchase Cost	125896	Purchase Price
Select Vendor	Select Vendor	Select Vendor
Vendor/Payee	Gardner and Denver	Vendor Name
Purchase Order No.	1304-876	PO Number

- **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:

The screenshot shows the 'Appraisal Information' form with the following fields and labels:

- Original Value**: 12598 (labeled: Asset's Purchase Cost)
- Appraisal Date**: 4/10/2013 (labeled: Date of Appraisal)
- Appraised Value**: 10078.4 (labeled: Appraised Value)
- Salvage Value**: 10000 (labeled: Estimated Salvage Value)
- Life Time**: 10 (labeled: Life Expectancy of the Asset)
- Method Used**: Double-Declining (labeled: Depreciation Method Used)
- Calculate Value** button (labeled: Perform Appraisal)
- value at the end of its life** (labeled: value at the end of its life)
- useful life in years** (labeled: useful life in years)

Appraisal Initial Setup

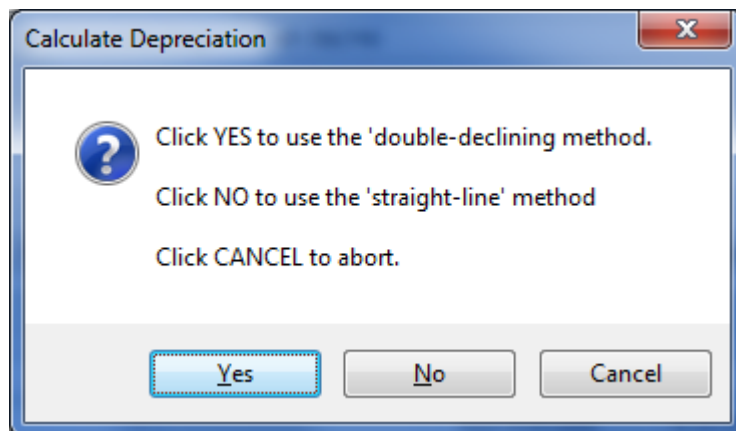
Before attempting to run the appraisal routine, the following information should be entered into the application:

- **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 disposed.
- **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.

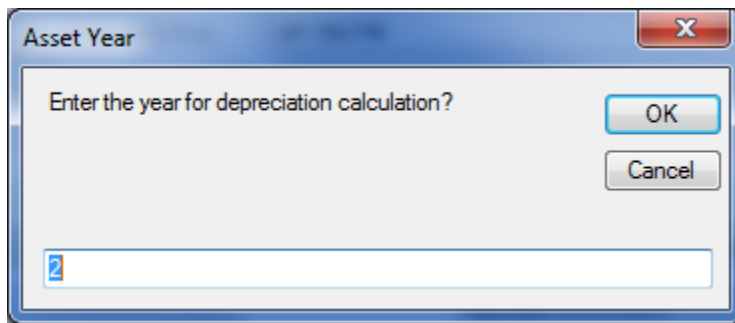
Performing the Appraisal

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**.



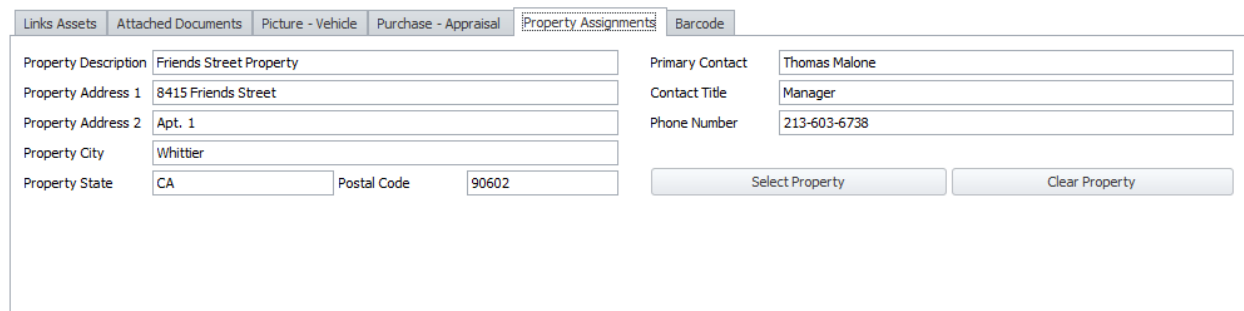
A dialog box titled "Asset Year" with a close button (X) in the top right corner. The main text inside says "Enter the year for depreciation calculation?". Below the text is a text input field containing the number "2". To the right of the input field are two buttons: "OK" and "Cancel".

- 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:



A screenshot of the "Property Assignments" tab in a software application. The tab is highlighted among others: "Links Assets", "Attached Documents", "Picture - Vehicle", "Purchase - Appraisal", "Property Assignments", and "Barcode". The form contains the following fields:

Property Description	Friends Street Property			Primary Contact	Thomas Malone
Property Address 1	8415 Friends Street			Contact Title	Manager
Property Address 2	Apt. 1			Phone Number	213-603-6738
Property City	Whittier				
Property State	CA	Postal Code	90602		

At the bottom right of the form are two buttons: "Select Property" and "Clear Property".

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.

The screenshot shows a software window titled "Properties and Locations" with a close button (X) in the top right corner. Inside the window, there is a tabbed interface with three tabs: "Lookup", "Details", and "Notes - Directions". The "Details" tab is currently selected. Below the tabs, there is a form with the following fields and values:

- Property Description: Friends Street Property
- Primary Contact: Thomas Malone
- Contact Title: Manager
- Phone Number: 213-603-6738
- Extension: 2
- E-Mail: (empty field)
- Address 1: 8415 Friends Street
- Address 2: Apt. 1
- City: Whittier
- State - Region: CA
- Postal Code: 90602
- Country: USA

At the bottom of the form, there is a status bar that says "Record 1 of 2" with navigation icons (back, forward, first, last, etc.) and a "Cancel" button with a red X icon.

- 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

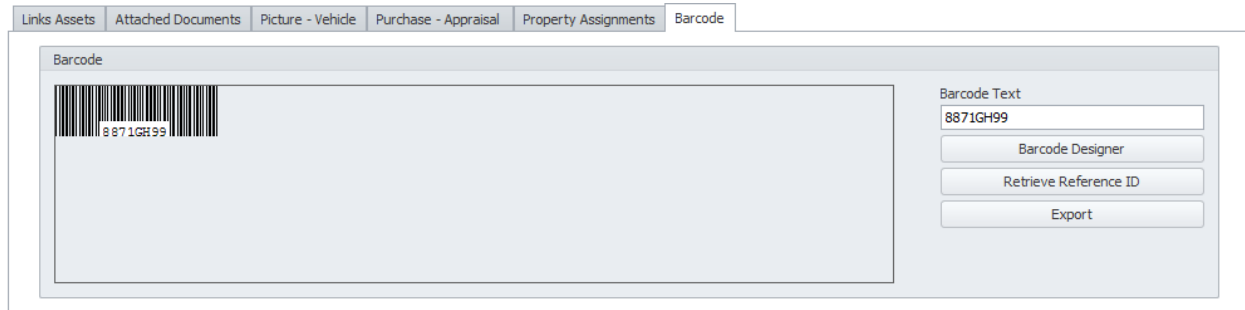
To delete a property from the database:

- 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.

Barcodes

You can create and use barcodes and labels with this module. Being that this is a fairly common feature throughout the system we invite you to the *Creating Barcodes and the Designer* section of the *Common Features* chapter.

The following illustration shows this feature:



To access the Barcodes routines from within the *Equipment and Assets* module:

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

Sub-Assemblies Tab

Sub-Assemblies can represent support equipment for use with a main asset. Examples of sub-assemblies could be pumps, drive motors, conveyor belts, transmissions, axles, and much more. Being each organization can have a wide range of equipment types, we let you define sub-assemblies here.

Earlier in this chapter we discussed **Linked Assets**, with parent/child relationships. This feature allows you to handle sub-assemblies just like normal assets and assign them to work orders directly. Here we allow you to add sub-assemblies directly to a parent asset. The use of both methods can prove to be useful.

The following image illustrates the **Sub-Assemblies** tab:

To add a new Sub-Assembly

- Move to the **Assemblies Lookup** group and locate the data control.
- Click the **Append (+)** button in the data control. The new blank record will be created, selected and ready for editing.
- Be sure to click on the **Post (checkmark)** button when done editing the record to save any changes.

Assembly Identification

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

The following illustrates the elements found in this section:

Assembly Reference

This field should be unique in your database, but it's not an enforced rule. It is used to help identify your assets. 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.

Assembly Description

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

Assembly Manufacturer

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

Assembly Serial No

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

Assembly Model No

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

Assembly Setup Fields

Clicking this button allows you setup the special user defined fields for this assembly.

Special Fields

Each sub-assembly allows you to setup various fields to help further define the assembly. The following illustrates the elements found in this section:

The screenshot shows a dialog box titled "Motor Information". It contains a list of fields with their corresponding values:

Field Name	Value
Horse Power (HP)	50
Frame	T145C
Rated Voltage	480 VAC
Full Load Amps	50
Frequency	60 Hz
RPM	1725
Brush Number	
Date Last Checked	
Condition	
Last Rebuild	

Annotations on the right side of the dialog box:

- Group Title**: Points to the "Motor Information" title bar.
- User Definable Titles**: Points to the field names (Horse Power (HP), Frame, Rated Voltage, Full Load Amps, Frequency, RPM, Brush Number, Date Last Checked, Condition, Last Rebuild).
- Data Fields**: Points to the input boxes containing the values.

The data values for each of these fields can contain up to 30 alpha/numeric characters.

Setting Up Equipment Sub-Assembly Fields

The following illustrates the elements of the Sub-Assemblies setup dialog screen:

The screenshot shows the "Sub-Assemblies" dialog box. It contains a section titled "Equipment Sub-Assemblies" with a sub-section "Sub-Assemblies Fields".

Annotations on the right side of the dialog box:

- Group's Title Field**: Points to the "Group's Title" field containing "Motor Information".
- User Defined Field Titles**: Points to the "User Field 1" through "User Field 10" labels.
- List of Pre-defined fields**: Points to the "Pre-Defined Fields" dropdown menu showing "None".
- Use Pre-defined fields**: Points to the "Set Fields" button.
- Accept and apply changes**: Points to the "OK" button.

The "Sub-Assemblies Fields" section contains the following fields:

User Field	Field Name
User Field 1	Horse Power (HP)
User Field 2	Frame
User Field 3	Rated Voltage
User Field 4	Full Load Amps
User Field 5	Frequency
User Field 6	RPM
User Field 7	Brush Number
User Field 8	Date Last Checked
User Field 9	Condition
User Field 10	Last Rebuild

To setup the fields of your sub-assemblies:

- Select the record you want to modify from the **Assemblies Lookup** grid.
- Move to the **Assembly Identification** group and click on the **Setup Fields** button.
- From the invoked **Sub-Assemblies** dialog, move to the various fields and edit the values found there.
 - **Group's Title** – This field can contain up to 30 alpha/numeric characters and is displayed in the group's caption.
 - **User Fields 1 – 10** – These fields are the user defined titles, and can contain up to 25 alpha/numeric characters each.
- There are a few pre-defined groups of fields that can be used. To use one of these sets of pre-defined fields:
 - Move to the **Pre-Defined Fields** drop down and select the group of your choice.
 - Move to and click on the **Set Fields** button. **Warning** – *This action will overwrite any fields you may already have setup.*
- Click on the **OK** button to accept these values.
- Move to the **Assembly Lookup** group and click on the **Post (checkmark)** button to save your changes.

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:

The screenshot shows the 'Asset History Log' window with the following components and annotations:

- Asset History Log Table:**

Date	Entry	Details
2/5/2011	This is a manual History Entry entered to test the feature.	This is the details of the manual entry
2/14/2011	Test Entry Number 2	This is the second entry I put into the log as a test
5/28/2014	Planned Maintenance-1101-0-Air Compressor Monthly Checks	Scheduled Start: 4/8/2013 8:00 AM
10/31/2011	Planned Maintenance-1106-8-Air Compressor Monthly Checks	Scheduled Start: 8/17/2011 8:00 AM
6/16/2014	Planned Maintenance-1102--1-Air Compressor Monthly Checks	Scheduled Start: 4/17/2011 8:00 AM
6/13/2014	Planned Maintenance-1101-0-Air Compressor Monthly Checks	Scheduled Start: 4/8/2013 8:00 AM
6/1/2012	New Entry	New Entry
2/16/2012	Planned Maintenance-1101-0-Air Compressor Monthly Checks	Scheduled Start: 12/17/2011 8:00 AM
2/16/2012	Planned Maintenance-1101-0-Air Compressor Monthly Checks	Scheduled Start: 12/17/2011 8:00 AM
- History Details Section:**
 - Entry Date:** 2/5/2011
 - Details:** This is the details of the manual entry
 - Edit Details:** Button to edit the entry.

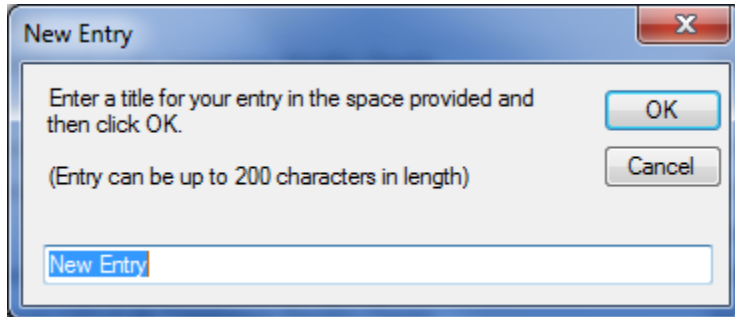
Annotations on the right side of the image point to the following elements:

- Entry Date
- Entry Details
- Entry Description
- Data Control
- Main Details
- Edit Detail with Editor

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	

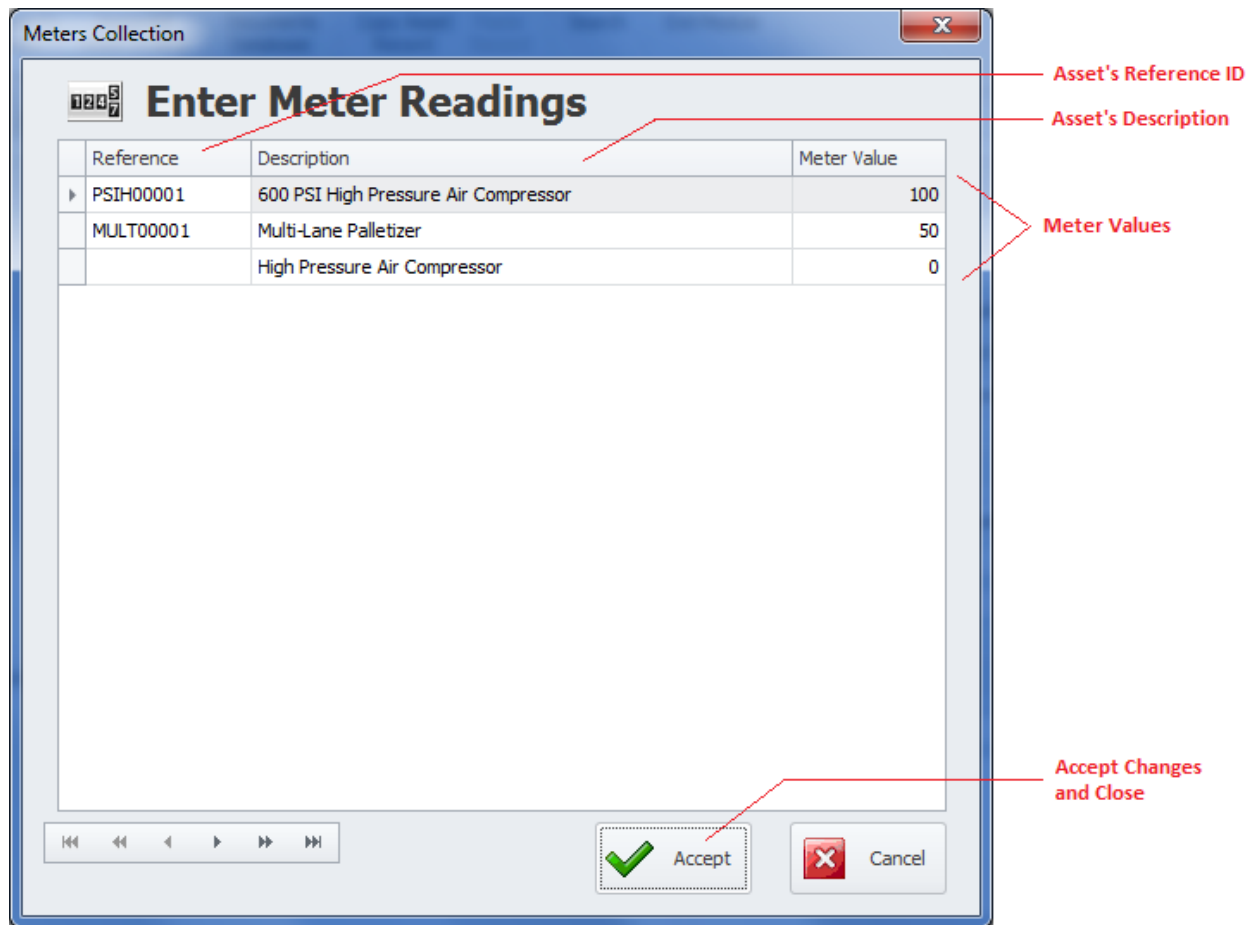
To print the Meters Collection sheet:

- 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:



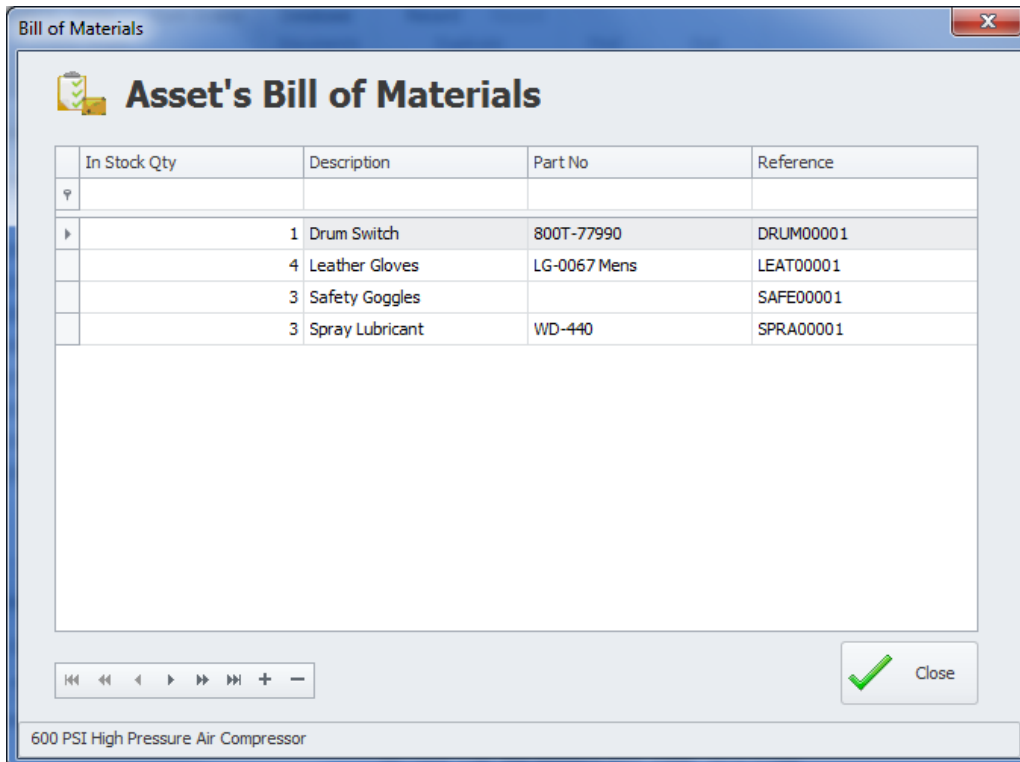
To enter Assets Meters:

- 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.

Bill of Materials Database

The *Bill of Materials* feature allows for the creation of a comprehensive list of components and assemblies required to build or maintain an asset. You can build *bill of materials* (BOM) lists for every asset and sub-assembly recorded in the database, and the same inventory item can be assigned or reused with multiple records.

The following illustration shows a typical Bill of Material Database:



In Stock Qty	Description	Part No	Reference
1	Drum Switch	800T-77990	DRUM00001
4	Leather Gloves	LG-0067 Mens	LEAT00001
3	Safety Goggles		SAFE00001
3	Spray Lubricant	WD-440	SPRA00001

600 PSI High Pressure Air Compressor

To access the Bill of Material List

- A BOM can be built for either an asset or sub-assembly. 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 **Bill of Materials** option to expand the drop down and then select the appropriate option available.
 - **Primary Asset Material List**
 - **Sub-Assembly Material List**

Adding Records to the Bill of Materials List

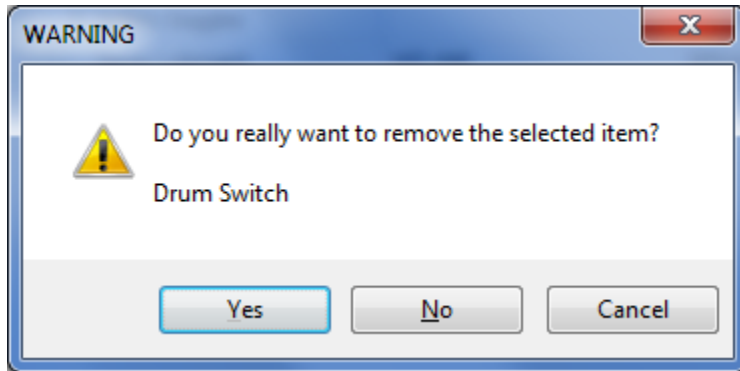
To add records to the BOM list:

- Move to the data control located here and click on the **Append (+)** button.
- From the invoked **Parts and Inventory** lookup dialog, select the inventory item you want to assign.

- Click on the **Select** button.
- Repeat the above for each record you want to add.

Removing a Record from the Bill of Materials list

- From the **Bill of Materials** dialog, move to the grid and select the item you want to remove.
- Click on the **Delete (-)** button in the data control.



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

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:

600 PSI High Pressure Air Compressor

Asset's Work Orders

Drag a column header here to group by that column

Task ID	Subject	Location	Start Date	End Date	Completion D...
1106-8	Air Compressor Monthly Checks	Support Equipment Room	9/26/2011	9/30/2011	10/31/2011
1105-7	Air Compressor Monthly Checks	Support Equipment Room	7/3/2012	7/6/2012	
1108-9	Air Compressor Monthly Checks	Support Equipment Room	8/20/2012	8/24/2012	
1110-11	Air Compressor Monthly Checks	Support Equipment Room	12/3/2012	12/7/2012	
1101-0	Air Compressor Monthly Checks	Support Equipment Room	4/8/2013	4/12/2013	
1102--1	Air Compressor Monthly Checks	Support Equipment Room	6/2/2014	6/6/2014	
1406-10	Repair roll up door between prod...	Main Facility	6/27/2014	6/28/2014	
1101--2	Air Compressor Monthly Checks	Support Equipment Room	7/1/2014	7/8/2014	

Filter By: View All

Print Preview

Close

Assigned Work Orders

Data Control

Preview Selected Work Order

Filtering Options

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.

Documents Database

This module supports its own **Documents Database**. To see how to use this feature, please refer to the [Documents Database](#) section of the [Common Features](#) chapter.

To access the Documents Database:

- Move to the **Home** tab in the ribbon and select the **Documents Database** option.

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:

Asset Wizard

Report Wizard

Location Assignments Resources Sort By

Physical Location

Locations: Support Equipment Room Select Use All

Building

Storage: Use All Select Use All

Previous Next Accept Cancel

Criteria or Matching Assignments Selection

Clears Assignments

- **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:

Asset Wizard

Report Wizard

Location Assignments Resources Sort By

Accounts

Account: Use All Select Use All

Classifications

Classification: Injection Molding Select Use All

Previous Next Accept Cancel

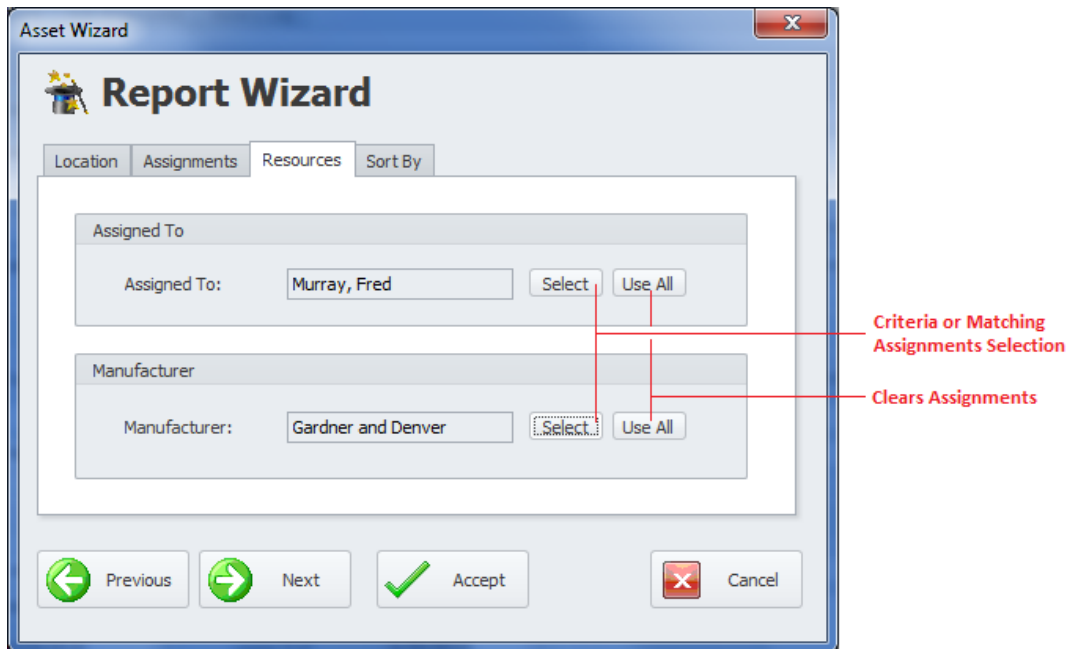
Criteria or Matching Assignments Selection

Clears Assignments

- **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

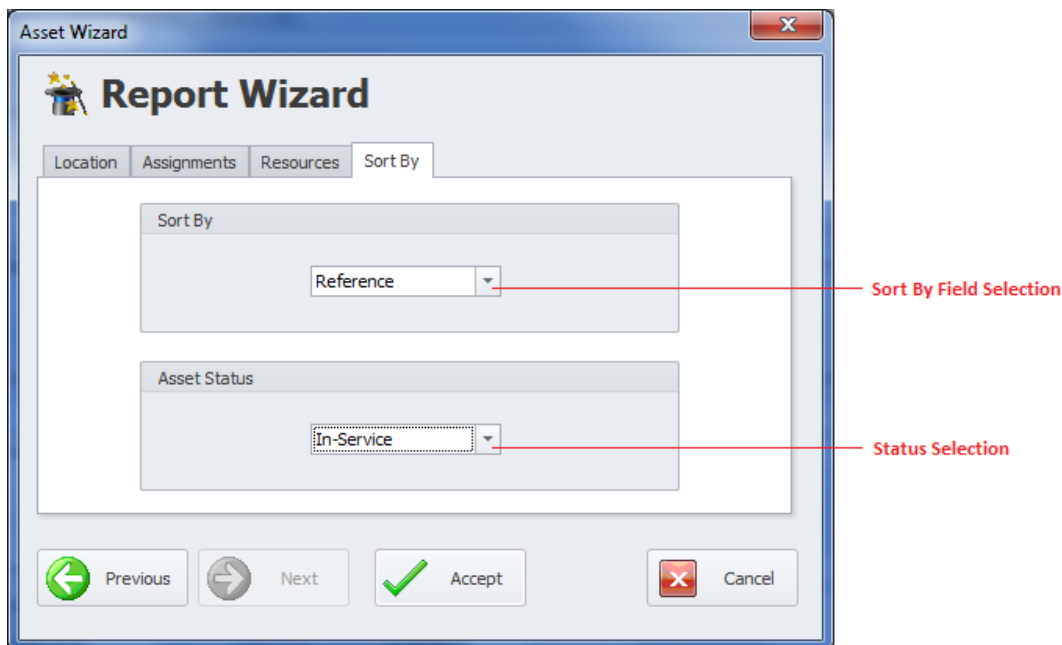
The following illustrates the elements found on this tab:



- **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.

Fuel Usage Log

If the current asset is some type of a vehicle, then you can track and report on the vehicle's fuel usage.

The following illustrates the elements of the Fuel Usage Log:

The screenshot shows the 'Fuel Usage Tracking' dialog box. It features a table on the left for 'Fuel Usage Records' and a 'Fuel Record Details' section on the right. The table has columns for Date, Units, and Odometer. The 'Fuel Record Details' section includes input fields for Date, Units Purchased, Odometer Value, and Cost, along with an 'Update Asset's Meter Value' button. Below these are buttons for 'Add New', 'Remove', 'Save Changes', and 'Close'. Red lines with labels point to various elements: 'Lookup Grid' points to the table header, 'Entry Date' points to the Date field, 'Quantity Purchased' points to the Units Purchased field, 'Current Odometer' points to the Odometer Value field, 'Amount of Purchase' points to the Cost field, 'Update Current Asset' points to the 'Update Asset's Meter Value' button, 'Add New Entry' points to the 'Add New' button, 'Deletes Selected Entry' points to the 'Remove' button, 'Save Recent Changes' points to the 'Save Changes' button, and 'Closes the dialog' points to the 'Close' button.

Date	Units	Odometer
6/11/2014	32	3200
7/3/2014	29.5	3456

Fuel Record Details

Date: 7/3/2014

Units Purchased: 29.5

Odometer Value: 3456

Cost: 120.36

Update Asset's Meter Value

Record

Add New Remove

Save Changes

Close

To record Fuel Usage

- Select and make current the asset that you want to record this information on.
- Move to the **Asset** tab in the ribbon and select the **Fuel Usage Log** option.

- From the invoked **Fuel Usage Records** dialog, move to and click on the **Add New** button.
- Move to the **Fuel Record Details** group and edit the fields found there.
 - **Date** – Use the attached drop down calendar to edit the date of the record.
 - **Units Purchased** – This is a numeric only field and would indicate the gallons, liters, etc. that was purchased.
 - **Odometer Value** – This a numeric only field and would indicate the odometer reading of the vehicle at the time of the fueling.
 - **Cost** – This is a numeric only field and would indicate the total cost of this fueling.
- Click on the **Save Changes** button save your entries.

Update Asset's Meter Value

To take a record's recorded **Odometer Value** and apply it to the current asset's **Meter Value**:

- Update the **Odometer Value** using the attached drop down calculator.
- Click on the **Update Asset's Meter Value** button.
- When prompted about allowing the update, click on the **Yes** button.

Removing a Fuel Usage Log Entry

To remove a log entry:

- Move to the **Lookup Grid** and select the record you want to remove.
- Move to and click on the **Remove** button.
- When prompted about the removal, click on the **Yes** button.

Vehicle Trip Tracker

If the current asset is some type of a vehicle, then you can track and report on the vehicle's trip usage.

To access the Trip Tracker

- Select and make current the asset that you want to record or view information on.
- Move to the **Asset** tab in the ribbon and select the **Trip Log** option.

Trip Tracker Lookup tab

When the **Trip Tracker** first loads, you will be greeted by the **Lookup** tab. To view or edit an existing record move to and select the record you want to work with from those listed in the grid. Once the record has been selected, you can move to the **Details** tab to view or edit the record's details.

Trip Tracker Details tab

On the **Details** tab you can create and edit a record's details.

The following illustrates the elements of the **Fuel Usage Log Details** tab:

The screenshot shows the 'Vehicle Trip Tracker' application window. It has a 'Lookup' and 'Details' tab. The 'Details' tab is active, showing a form for trip information. The form includes fields for Trip Designation, Trip Purpose, Project, Employee, Trip Start Date, Trip End Date, Odometer Start, Odometer End, Total Miles, and Notes. A 'Records' panel on the right contains 'Add New', 'Remove', and 'Save Changes' buttons. A 'Close' button is at the bottom right. Red lines and text annotations point to specific features: 'Add New Trip Record' points to the 'Add New' button; 'Removes current record' points to the 'Remove' button; 'Saves recent changes' points to the 'Save Changes' button; 'Trip Details' points to the main form area; and 'Update the current asset's meter value' points to the 'Update Current Meter w/Odometer End' button at the bottom of the form.

- **Trip Designation** – This alpha/numeric field can contain up to 50 characters and is used to help identify a trip record.
- **Trip Purpose** – This alpha/numeric field can contain up to 50 characters and is used to help explain why the trip was made.
- **Project** – This alpha/numeric fields can contain up to 50 characters and is used to specify any project that this trip may apply to.
- **Employee** – Selectable by clicking on the Ellipse button. This field would indicate the driver.
- **Trip Start Date** - Use the attached drop down calendar to edit the start date of the trip.
- **Trip End Date** - Use the attached drop down calendar to edit the end date of the trip.
- **Odometer Start** – This numeric only field is to record the vehicle's starting odometer value.
- **Odometer End**– This numeric only field is to record the vehicle's ending odometer value.
- **Total Miles** – This numeric value is used to show the total mileage of the trip. Clicking on the ellipse (...) button here will subtract the **Odometer Start** value from the **Odometer End** value and apply the result here.
- **Notes** – Use this field to record any notes you want to make about the trip. This alpha/numeric field has no size limitations.
- **Update Current Meter w/Odometer End** – Clicking on this button will take the **Odometer End** value of the trip and apply it to the **Meter Value** field of the selected asset.

To create a new Trip Log entry

- Select and make current the asset that you want to record information on.
- Move to the **Asset** tab in the ribbon and select the **Trip Log** option.

- When the **Vehicle Trip Tracker** dialog loads, move to **Details** tab and click on the **Add New** button.
- Move through the various fields of this tab, and edit the information as appropriate to these fields.
- Move to and click on the **Save Changes** button to save your changes.

Removing a Trip Log Entry

To remove a log entry:

- Move to the Grid as found on the **Lookup** tab and select the record you want to remove.
- Move to the **Details** tab and click on the **Remove** button.
- When prompted about the removal, click on the **Yes** button.

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:

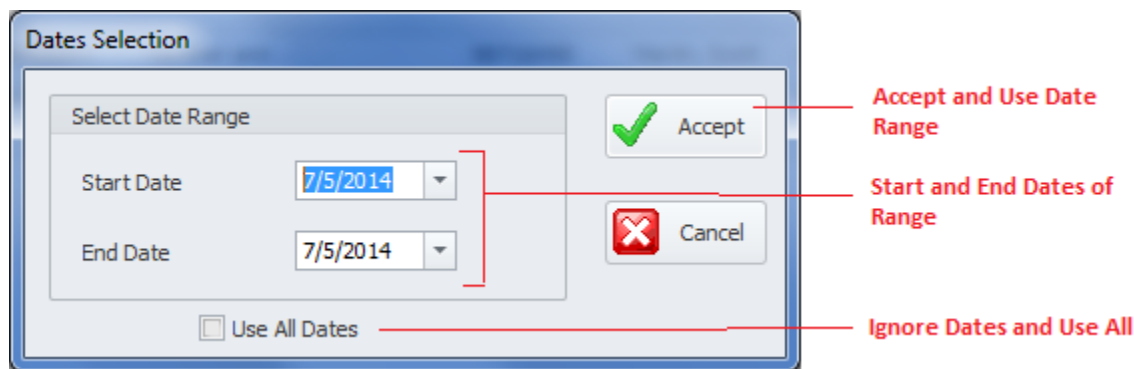
The screenshot shows the 'Work Orders Report' wizard dialog box. It has a title bar with a close button (X). The main area is divided into several sections: 'Work Order Types' with three radio buttons (Planned Maintenance, Repair Work Orders, All Types), 'Date Range' with 'Start Date' (7/1/2014) and 'End Date' (7/25/2014) dropdowns, and a 'Use All Dates' checkbox. Below these is 'Work Order Status' with a dropdown menu showing 'Completed'. At the bottom are 'Accept' and 'Cancel' buttons. Red lines with labels point to specific elements: 'Work Order Types Selection' points to the radio buttons; 'Date Range Selection' points to the date dropdowns; 'Work Order Status Selection' points to the status dropdown; and 'Accept Criteria Create Report' points to the 'Accept' button.

- **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
PSIH00001 Support Equipment Room	High Pressure Air Compressor 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 Manufacturer: Gardner and Denver Model No:		Reference: PSIH00001 Serial No: 8871GH99 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.

Bill of Materials Report

The **Bill of Materials Report** is used to report on all material assigned to either a main asset's record, or a sub-assembly's record.

600 PSI High Pressure Air Compressor Asset Bill of Materials									
Description: 600 PSI High Pressure Air Compressor Manufacturer: Gardner and Denver Model No:		Reference: PSIH00001 Serial No: 8871GH99 Asset No:							
Reference	Description	Part No	On Hand	Max Level	Min Level	Order Qty	Unit Cost	Storage	
DRUM00001	Drum Switch Allen-Brady	800T-77990	1.0	1.0	1.0	1.0	167.77	Electrical Area	
LEAT00001	Leather Gloves WestCo Mfg. Co	LG-0067 Mens	4.0	2.0	5.0	12.0	8.76	Safety Supplies Area	
SAFE00001	Safety Goggles Safe-R-Us		3.0	7.0	2.0	5.0	6.43		

To create the Bill of Materials Report:

- Select and make current either the Asset's record, or Sub-Assembly's record you want to base your report on.
- Move to and click on the **Reports** tab in the ribbon.
- Expand the **Bill of Materials** option by clicking on it. Make the appropriate selection by clicking on the appropriate option.
 - Primary Asset Bill of Materials**

- **Sub-Assembly Bill of Materials**

History Log Report

To print a copy of the History Log:

Maintenance History Log	
Description:	600 PSI High Pressure Air Compressor
Manufacturer:	Gardner and Denver
Model No:	
Reference:	PSIH00001
Serial No:	8871GH99
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 performed 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 USAGE: Qty Used: 2.00, ISAFE000011 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	Reference:	PSIH00001	
Manufacturer:	Gardner and Denver	Serial No:	8871GH99	
Model No:		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.

Print Barcodes

You can print barcode labels with this module. To print barcodes:

- 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 **Print Barcode** option.
- Follow the instructions as outlined in the [Printing Barcode Labels](#) section of the [Common Features](#) chapter.

Fuel Usage Report

With the Fuel Usage Report you can report on Fuel consumption for a date range, and this report can be based on a single asset, or all assets that have records within the date range.

High Pressure Air Compressor - Fuel Usage Report					
Date	Equipment	Reference	Odometer	Fuel Qty	Cost
6/11/2014	High Pressure Air Compressor		3,200.0	32.0	\$129.92
7/3/2014	High Pressure Air Compressor		3,456.0	29.5	\$120.36
TOTALS				61.5	\$250.28

To create a Fuel Usage Report:

- When creating the report for a single asset, select and make current the asset record you want to base your report on.
- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Fuel Usage** option to expand the drop down, then make one of the following selections:
 - **Current Asset** – Reports on the current asset.
 - **All Assets** – Reports on all available assets.
- From the **Date Selection** dialog setup the date range for your report. See the section on the [Date Selection Dialog](#) for more information.
- Click the **Accept** button.

Vehicle Trip Report

The **Trip Report** using its own creation wizard as shown in the following illustration:

To create the Trip Report:

Trip Report									
Trip Dates		Odometer		Assignments		General Information			Total Miles
Start	End	Start	End	Vehicle	Driver	Designation	Purpose		
7/3/2014	7/3/2014	3,456.0	3,492.0	High Pressure Air Compressor	Eliot, Kate	New Trip	Delivery of Order		36.0
TOTALS									36.0

- Move to and click in the **Reports** tab in the ribbon.
- Click on the **Trips Report** option.
- Setup the report criteria as you see fit, and in a way that will return the information you want.

- Move to and click on the **Accept** button.

Parts and Inventory

This module is used as part of an inventory control system. Use this module to keep track of all the inventory items that your organization requires to conduct everyday business. With this module you can track inventory levels, storage locations, set minimum and maximum stock levels, record costs, and more.

The screenshot displays the 'Parts and Inventory' module interface. It features a ribbon control at the top with tabs for 'File', 'Home', 'Filters', and 'Reports'. The 'Home' tab is active, showing a series of icons for 'Add New', 'Save Changes', 'Parts Checkout', 'Scan Checkout', 'Parts Lookup', 'Current Notes', 'Refresh', 'Search', and 'Exit Module'. Below the ribbon, the interface is divided into several sections:

- Shortcuts:** A sidebar on the left with icons for 'Part Checkout', 'Print Preview Current Item', 'Main Report Wizard', and 'Default Filter (View All)'.
- Identification:** Fields for 'Reference ID' (DRUM00001), 'Description' (Drum Switch), 'Manufacturer' (Allen-Brady), and 'Part Number' (800T-77990). It includes 'Auto' and 'Check' buttons.
- General Assignments:** Fields for 'Classification', 'Account' (General Use), 'Location' (Main Storeroom), 'Storage Area' (Electrical Area), and 'Aisle'. It includes 'Manage' buttons.
- Primary Assignments:** Fields for 'Primary Vendor' (Gardner and Denver) and 'Primary Equipment' (600 PSI High Presser Air Compressor). It includes 'Select' buttons.
- Inventory Management:** Fields for 'Quantity In Stock' (1), 'Reorder Quantity' (1), 'Minimum Level' (1), 'Maximum Level' (1), 'Unit Type' (Each), 'Items per Unit' (1), and 'Unit Price' (167.77). It includes a 'Manage Unit Types' button.
- Vendor Price Comparisons:** A table showing 'Company' (Gardner and Denver), 'Reference' (GARD00001), 'Comparison Date' (7/9/2014), and 'Unit Price' (258.36).

The status bar at the bottom indicates 'Drum Switch' and 'Record 2 of 6'.

One of the key features of this module is with its use of **Part Groups**. With **Part Groups** you can assign a single inventory item to various groups. Use Groups to help ease the part lookup process, and for the easy association of various parts to equipment, departments, and other related information.

Ribbon Control

The comprehensive functionality of the **Parts and Inventory** 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

This image shows a close-up of the 'Home' tab ribbon control. It is organized into three main groups:

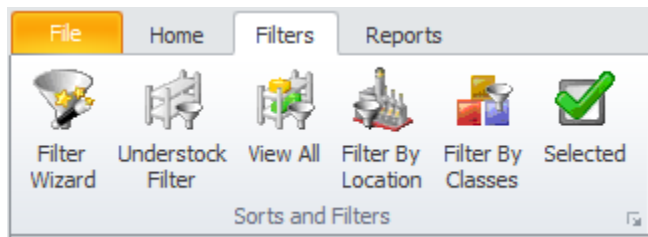
- Records:** Contains 'Add New' and 'Save Changes' icons.
- Parts:** Contains 'Parts Checkout', 'Scan Checkout', 'Parts Lookup', and 'Current Notes' icons.
- Refresh/Find/Exit:** Contains 'Refresh', 'Search', and 'Exit Module' icons.

Below the icons, the group names 'Records', 'Parts', 'Refresh', 'Find', and 'Exit' are displayed.

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).
- **Parts Checkout** – Invokes the **Parts Checkout** dialog.
- **Scan Checkout** – Invokes the **Barcode Checkout** dialog for use with scanners.
- **Parts Lookup** – Invokes the **Parts Lookup** dialog that can have items arranged by groups, or in the standard way.
- **Current Notes** – Allows the viewing and editing of the notes assigned to the current item.
- **Refresh** – Re-reads the database.
- **Search** - Invokes the search/find routine on the Lookup Grid.
- **Exit Module** - Close and exits the module.

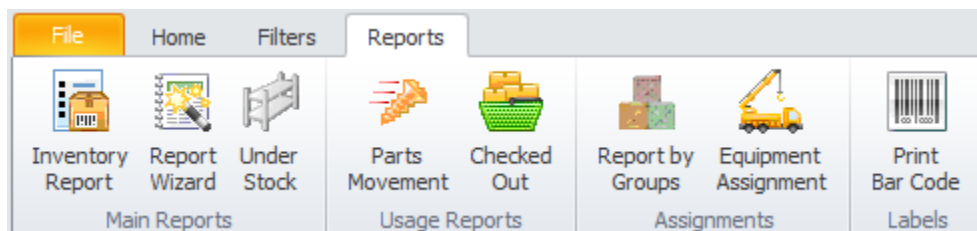
FILTERS TAB



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

- **Filter Wizard** - Invokes the main **Report/Filter Wizard** to assist in filtering inventory items.
- **Understock Filter** – Filters the database to show all inventory items that have fallen below recommended inventory levels.
- **View All** – Filters the database to show all inventory items.
- **Filter by Location** – Allows you to select a Location Assignment to filter by.
- **Filter by Classes** – Allows you to select a Classification Assignment to filter by.
- **Selected** – Filters the database by all records that have the '**Selected**' checkbox checked.

REPORTS TAB



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

- **Inventory Report**- Invokes the main **Report/Filter Wizard** to assist in creating the report.

- **Report Wizard** - Invokes the main **Report/Filter Wizard** to assist in creating the report. This is basically the same report as above, but adds the **On-Order** column.
- **Under Stock Report** – Reports on all inventory items that have fallen below recommended minimum stock levels.
- **Parts Movement** – Uses a wizard to report on inventory movement.
- **Checked Out Report** – Uses a wizard to report on item checkouts.
- **Report by Groups** – Returns all inventory items belonging to a selected group.
- **Equipment Assignment Report** – Returns all inventory items belonging to a selected asset.
- **Print Barcode** – Invokes the barcode label printing routines.

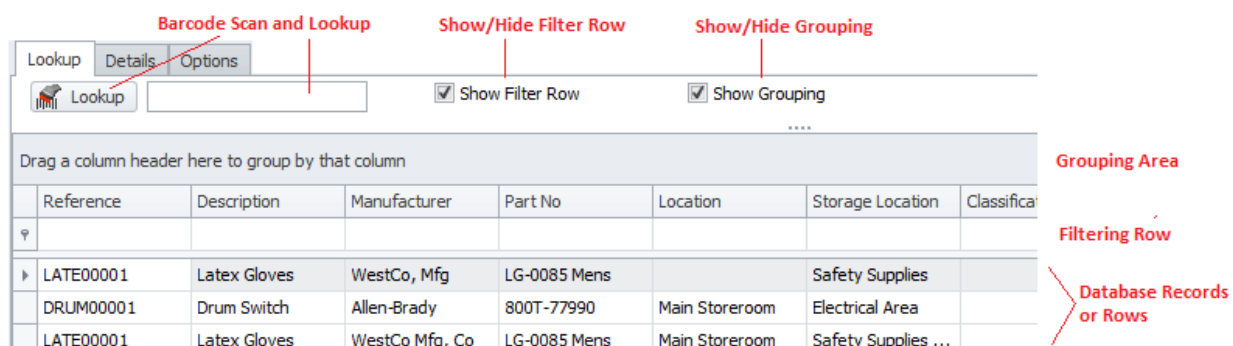
Features of the Parts and Inventory Module

There are many features of the **Parts and Inventory** 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 records by grouping, filtering and sorting them. All the items in the current filter are located in the grid found here. To select a property record and make it the active record, the user needs only to click on the record from within the grid. Once selected the user can click on the other tabs to view or edit the record 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. Apply special attention to the following:

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

Details Tab

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

Identification

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

The following illustrates the elements found in this section:

The screenshot shows the 'Identification' form with the following fields and buttons:

- Reference ID:** A text field containing 'DRUM00001'. A red line points to this field with the label 'Reference Identification'.
- Auto:** A button next to the Reference ID field. A red line points to it with the label 'Automatic Reference ID'.
- Check:** A button next to the Auto button. A red line points to it with the label 'Automatic Reference ID'.
- Description:** A text field containing 'Drum Switch'. A red line points to this field with the label 'Item Description'.
- Manufacturer:** A text field containing 'Allen-Brady'. A red line points to this field with the label 'Item Manufacturer'.
- Manage:** A button next to the Manufacturer field. A red line points to it with the label 'Item Manufacturer'.
- Part Number:** A text field containing '800T-77990'. A red line points to this field with the label 'Manufacturer's Part No'.
- Discontinued Item:** A checkbox next to the Part Number field. A red line points to it with the label 'Item Status'.
- Selected:** A checkbox at the bottom left. A red line points to it with the label 'Item Selection'.

Reference ID

This field should be unique in your database, but it's not an enforced rule. It is used to help identify your inventory item, 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 40 alpha/numeric characters.

Manufacturer

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

Part Number

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

Discontinued Item

When checked, this would indicate a discontinued inventory item.

Selected

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

Primary Assignments

This section allows you to specify the primary assignments as it applies to the current inventory item.

The following illustrates the elements found in this section:

The screenshot shows a form titled "Primary Assignments". It contains two rows. The first row is labeled "Primary Vendor" and has a text input field containing "Gardner and Denver", a small "X" button to its right, and a "Select" button further right. The second row is labeled "Primary Equipment" and has a text input field containing "600 PSI High Presser Air Compressor", a small "X" button to its right, and a "Select" button further right. Red lines with labels point to these elements: "Primary Vendor" points to the first row's label; "Invoked Assignment Lookup Dialogs" points to the "Select" buttons; and "Primary Asset Usage" points to the second row's label.

Primary Vendor

This field can contain up to 40 alpha/numeric characters and is used to indicate the supplier of the item. You type in a value in this field or select a vendor by clicking on the **Select** button adjacent to this field. Then clicking on a Vendor from the grid, and finally clicking on the **Select** button.

Primary Equipment

This field would indicate the primary asset this item is used on. You will be able to add additional assets in another section. To make this assignment:

- Click on the **Select** button adjacent to this field.
- Click on the asset you want to assign from the lookup grid and click the **Select** button.

General Assignments

This section allows you to specify some general assignments as it applies to the current inventory item.

The following illustrates the elements found in this section:

The screenshot shows a form titled "General Assignments". It contains two rows. The first row is labeled "Classification" and has a dropdown menu, a "Manage" button to its right, and a red line pointing to it with the label "Classification Assignment". The second row is labeled "Account" and has a dropdown menu containing "General Use", a "Manage" button to its right, and a red line pointing to it with the label "Account Assignment".

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.

Storage Location

This section allows you to specify where the inventory item is stored.

The following illustrates the elements found in this section:

The screenshot shows a form titled "Storage Location" with the following fields and buttons:

- Location:** A dropdown menu showing "Main Storeroom" with a "Manage" button to its right.
- Storage Area:** A dropdown menu showing "Electrical Area" with a "Manage" button to its right.
- Aisle:** A text input field.
- Bin No.:** A text input field.

Red lines with labels point to the following elements:

- Storage Location:** Points to the "Location" dropdown.
- Storage Area:** Points to the "Storage Area" dropdown.
- Storage Bin Number:** Points to the "Bin No." field.
- Storage Aisle:** Points to the "Aisle" field.

Location

This field can contain up to 40 alpha/numeric characters and is used to indicate physical location, building, or room of the inventory item.

Storage Area

This field can contain up to 40 alpha/numeric characters and is used to further define the physical location of the inventory item.

Aisle

This field can contain up to 30 alpha/numeric characters and is used to further define the physical location of the inventory item.

Bin No

This field can contain up to 30 alpha/numeric characters and is used to further define the physical location of the inventory item.

Inventory Management

Inventory control is maintained by setting up your inventory levels, specifying minimum, maximum, and reorder quantities. Other items that fall under this category include unit information, and unit pricing.

The unit pricing information is use by the *Purchasing and Receiving* module, and for work orders where this pricing information is used for costs calculations.

The following illustrates the elements found in this section:

The screenshot shows the 'Inventory Management' window with the 'Specifications' tab selected. The window contains several input fields and a button, with red lines pointing to specific elements labeled on the right:

- In Stock Quantity**: Points to the 'Quantity In Stock' field, which contains the value '1'.
- Unit Types Assignment**: Points to the 'Unit Type' dropdown menu, which is set to 'Each'.
- Reorder Quantity**: Points to the 'Reorder Quantity' field, which contains the value '1'.
- Items In Each Unit**: Points to the 'Items per Unit' dropdown menu, which is set to '1'.
- Unit Cost**: Points to the 'Unit Price' field, which contains the value '167.77'.
- Minimum Stock Level**: Points to the 'Minimum Level' field, which contains the value '1'.
- Maximum Stock Level**: Points to the 'Maximum Level' field, which contains the value '1'.

There is also a 'Manage Unit Types' button located between the 'Unit Type' and 'Items per Unit' fields.

Quantity in Stock

This is a numeric value only field and is used to indicate the current inventory level of the selected item.

Reorder Quantity

This is a numeric value only field and is used to indicate the recommended reorder quantity when replenishing the item.

Minimum Level

This is a numeric value only field and is used to indicate the recommended minimum level to maintain in inventory. This is also used with understock routines.

Maximum Level

This is a numeric value only field and is used to indicate the recommended maximum level to maintain in inventory.

Unit Type

This alpha/numeric field will accept up to 30 characters and is used to indicate the unit type on which the inventory item is usually supplied.

Items per Unit

This is a numeric value only field and is used to indicate the number of items that are found within a unit.

Unit Price

This is a numeric value only field (floating Point) and is used to indicate the last purchase cost associated with the current inventory item.

Specifications

This alpha/numeric field has no size limitations and is used to record any specification as it relates to the current inventory item.

Uses

This alpha/numeric field has no size limitations and is used to record any special uses as it relates to the current inventory item.

Vendors – Price Comparisons

This section allows you to build a database of various vendors that supply the currently selected inventory item. It also allows you to record purchasing costs or charges as they apply to these vendors. With this information you can make informed decisions when purchasing requirements arise.

The following illustrates the elements found in this section:

To add Vendors –Price Comparisons

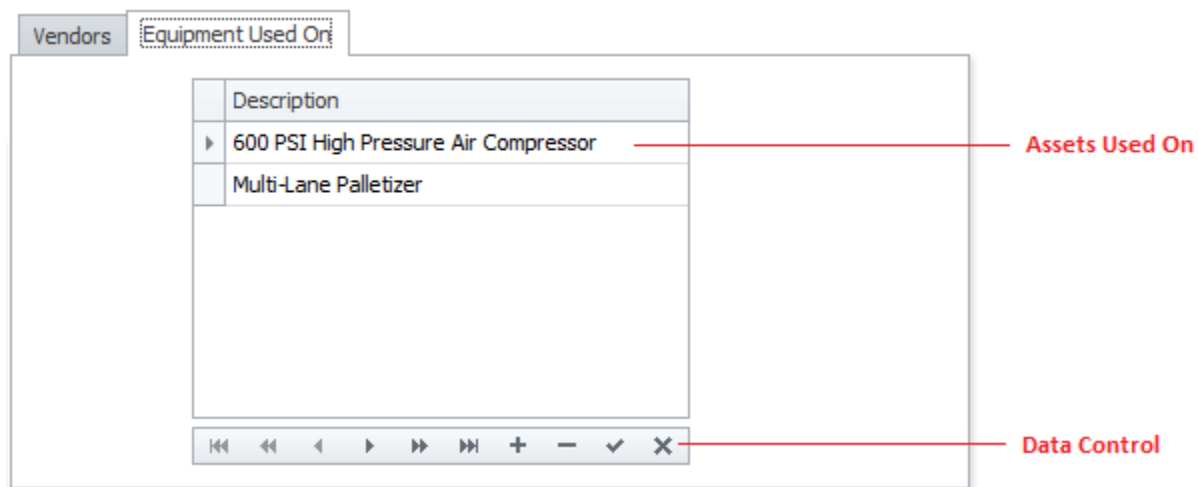
- Move to the **Details** tab, and then locate and click on the **Vendors** tab near the bottom of tab.
- Click on the **Append (+)** button in the data control.

- From the invoked **Contacts and Supplies** Lookup dialog, move to the grid and click on the record you want to assign.
- Click on the **Select** button.
- Move to the **Comparison Date** field and assign a date by using the attached calendar.
- Move to the **Unit Price** field and edit this value using the drop down calculator.
- Move to and click on the **Post (checkmark)** button in the data control to save your changes.

Equipment Used On

This section allows you to build a database based on the Equipment or Assets the current inventory item is used on. This is the same as the Bill of Materials (BOM) feature as explained in the Equipment and Assets chapter, but the roles are somewhat reversed. Instead of having the database assigned to an asset, it's grouped by inventory items.

The following illustrates the elements found in this section:



To add Equipment to the Used On list

- Move to the **Details** tab, and then locate and click on the **Equipment Used On** tab near the bottom of tab.
- Click on the **Append (+)** button in the data control.
- From the invoked **Equipment and Assets** Lookup dialog, move to the grid and click on the record you want to assign.
- Click on the **Select** button.

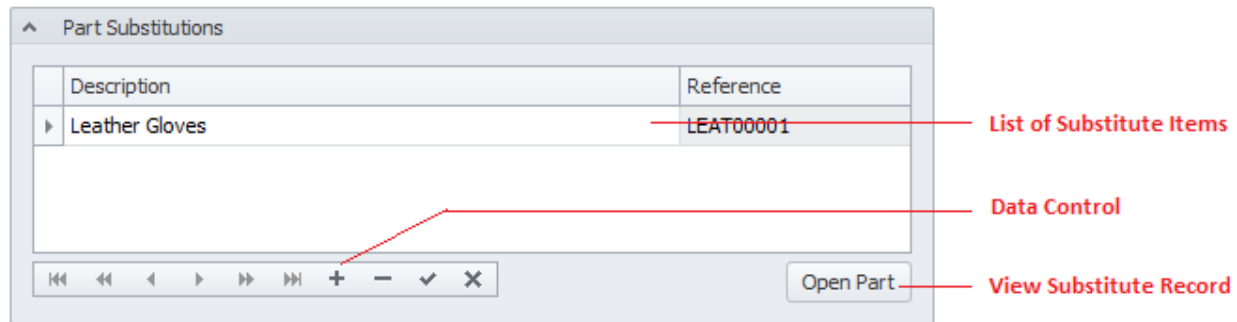
Options Tab

Under the **Options** tab you'll find additional assignments as it relates to the selected inventory record.

Parts Substitution Database

It is highly recommended that you setup substitute parts whenever possible. This comes in handy when you run out of stock on a specific inventory item, but have other parts that can be used in its place. Setting up substitute parts can save a lot of wasted time in situations when time is the most valuable.

The following illustrates the elements found in this section:



To add Parts to the Substitutions Database

- Move to the **Options** tab, and then locate the **Part Substitutions** group.
- Click on the **Append (+)** button in the data control.
- From the invoked **Parts and Inventory** Lookup dialog, move to the grid and click on the record you want to assign.
- Click on the **Select** button.

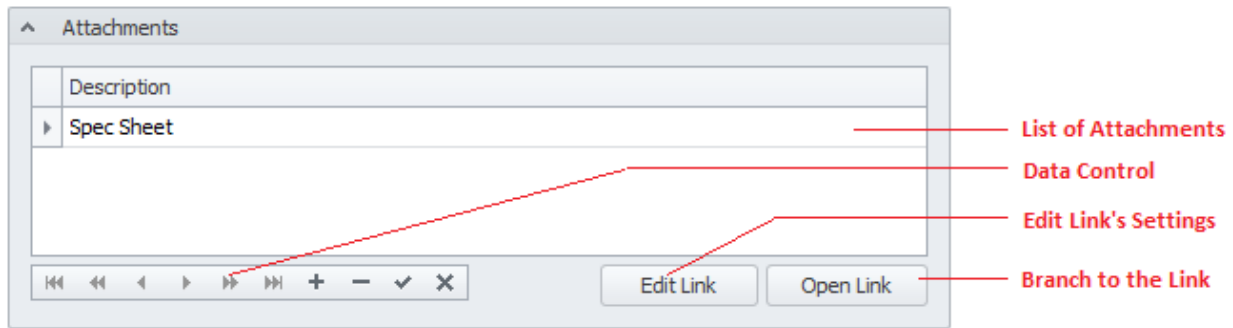
To View a record in the Substitutions Database

- Move to the **Options** tab, and then locate the **Part Substitutions** group.
- Move to the grid found there and click on the record of your choice.
- Click on the **Open Part** button to move to that record.

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:



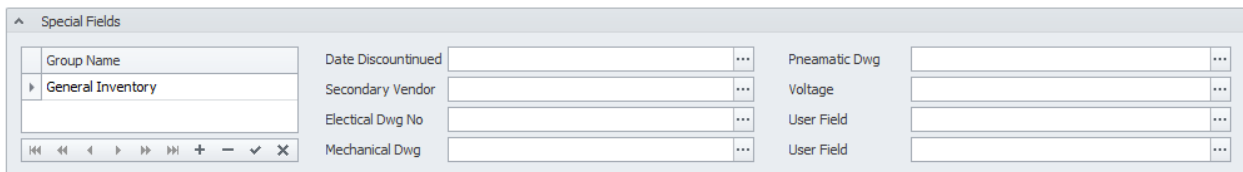
To access the attachments:

- Move to the **Options** tab of the inventory database, and locate the **Attachments** group.

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.

For more information about this feature please refer to the [Special Fields](#) section of the [Common Features](#) chapter.

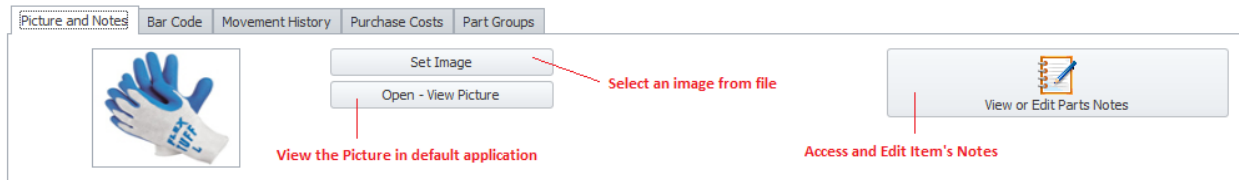
Inventory Item's Picture

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 and Notes** 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

- Right mouse click on the Image and select the **Save** option.
- 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.

Inventory Item's Notes

You can keep detailed notes on each item 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:

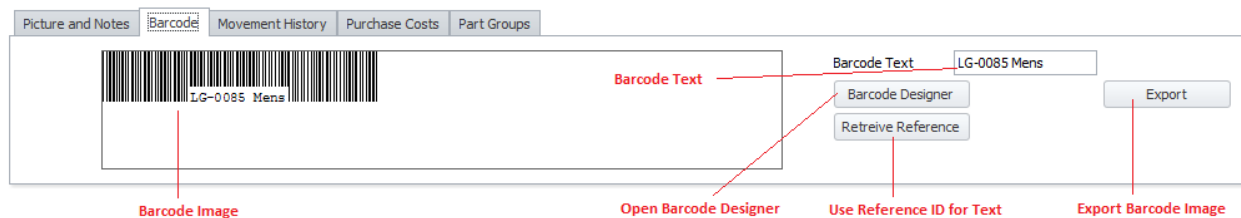
- Select the Inventory Item you want to view or edit the notes on.

- Move to the **Options** tab of the inventory database, and then click on the **Picture and Notes** tab near the bottom.
- Click on the **View or Edit Parts Notes** button, or move to the **Home** tab of the ribbon and click on the **Current Notes** options.

Barcodes

You can create and use barcodes and labels with this module. Being that this is a fairly common feature throughout the system we invite you to look at the [Creating Barcodes and the Designer](#) section of the [Common Features](#) chapter.

The following illustration shows this feature:



To access the Barcodes routines from within the **Parts and Inventory** module:

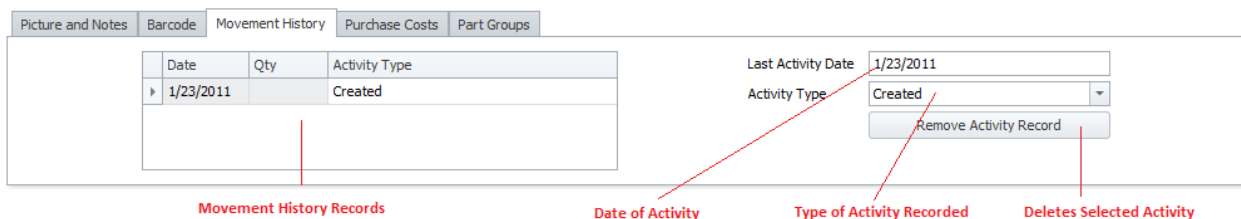
- Move to the **Options** tab of the inventory database, and then click on the **Barcode** tab near the bottom.

Movement History

Knowing if a part is actually being used can be considered as valuable information, especially when you want to reduce stagnant inventory for tax purposes. This information can also be proven useful when you want to increase stock levels to keep up with demand.

Information is added to this section from work orders part usage, purchasing, inventory checkout, and other sources throughout the system.

The following illustrates the elements found in this section:



- Select and make current the inventory record you want to view the information on.
- Move to and click on the **Options** tab.
- Click on the **Movement History** tab near the bottom.

- Select the record you want to remove.
- Right mouse click in the grid and click on the **Delete Record** option.
- When prompted about the deletion, click the **Yes** button.

- Select and make current the inventory record you want to remove information on.
- Move to and click on the **Options** tab and click on the **Movement History** tab near the bottom.
- Right mouse click in the grid and click on the **Delete Date Range** option.
- When prompted about the deletion, click the **Yes** button.

The inventory database maintains a listing of recent purchases and the costs associated with these purchases. This information is automatically updated when items are received into inventory from the ***Purchasing and Receiving*** module.

Picture and Notes	Barcode	Movement History	Purchase Costs	Part Groups												
<table border="1"> <thead> <tr> <th>Date</th> <th>Qty</th> <th>Unit Cost</th> <th>Vendor Name</th> </tr> </thead> <tbody> <tr> <td>7/2/2014</td> <td>7</td> <td>8.76</td> <td>Gardner and Denver</td> </tr> <tr> <td>7/10/2014</td> <td>5</td> <td>8.76</td> <td>Gardner and Denver</td> </tr> </tbody> </table>					Date	Qty	Unit Cost	Vendor Name	7/2/2014	7	8.76	Gardner and Denver	7/10/2014	5	8.76	Gardner and Denver
Date	Qty	Unit Cost	Vendor Name													
7/2/2014	7	8.76	Gardner and Denver													
7/10/2014	5	8.76	Gardner and Denver													

- Select and make current the inventory record you want to view the information on.
- Move to and click on the **Options** tab.
- Click on the **Purchase Costs** tab near the bottom.

- Select the record you want to remove.
- Right mouse click in the grid and click on the **Delete Record** option.
- When prompted about the deletion, click the **Yes** button.

Deleting a Date Range of Cost Tracking Records

- Select and make current the inventory record you want to remove information on.
- Move to and click on the **Options** tab and click on the **Purchase Costs** tab near the bottom.
- Right mouse click in the grid and click on the **Delete Date Range** option.
- When prompted about the deletion, click the **Yes** button.

Parts Groups

You can assign each of your inventory items to a group or multiple groups. These groups, by design could be related to their general usage such as Electrical, Hardware, Paints, and so on. Each part can be assigned to a countless number of groups, limited only by disk space and your imagination. These groups can greatly simplify item lookup.

The following illustrates the elements found in this section:



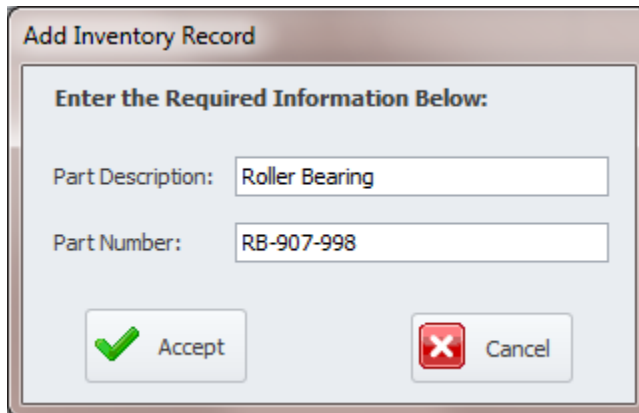
To Assign an Inventory Item to a Parts Group

- Move to and make current the inventory item you want to assign a group to.
- Move to the **Options** tab of the inventory database, and then click on the **Part Groups** tab near the bottom.
- Click on the **Add Group** button.
- From the invoked **Part Groups** dialog, move and select the group want to assign from those listed.
- Click on the **Select** button.

Add a New Inventory Record

To add a new inventory record:

- Move to the **Home** tab in the ribbon and click on the **Add New** option. This will invoke the **Add Inventory Record Dialog**.

A screenshot of the 'Add Inventory Record' dialog box. The dialog has a title bar with the text 'Add Inventory Record'. Inside, there is a section titled 'Enter the Required Information Below:'. Below this title, there are two text input fields. The first is labeled 'Part Description:' and contains the text 'Roller Bearing'. The second is labeled 'Part Number:' and contains the text 'RB-907-998'. At the bottom of the dialog, there are two buttons: 'Accept' with a green checkmark icon and 'Cancel' with a red 'X' icon.

- Enter the **Part Description** and **Part Number** information in the spaces provided and then click the **Accept** button.
The application will now search the database for a matching record. If found it will prompt you if your wish to continue or not. This routine will help to prevent duplicate entries.
- Finally 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.

Print Options

To print the current inventory record:

- Locate and select the item you want to print.
- Open the **File** menu and expand the **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 record.

Parts Checkout

The **Parts Checkout** routine was design for the easy and quick issuing of inventory items. This routine will not only remove items from stock, but will also update the part's **Movement History** database.

The following illustrates the elements of Parts Checkout dialog screen:

- **Quantity Checked Out** – This amount indicates the quantity of the selected item that will be checked out.
- **Checkout Reason** – Selected from the drop down, this allows you to assign the reason behind the item check out.
- **Checked Out By** – This alpha/numeric field allows you to record the person that is checking the item out. This field can contain up to 30 characters, and can also be set by using the **Select** button found here.
- **Account** – This allows you to assign the checkout to an account.
- **Accept** – Clicking this button performs the checkout and updates the inventory levels, and creates a Parts **Movement History** record.

To check an inventory item out

- Move to and make current the inventory record that contains the item you want to check out.
- Move to the **Home** tab in the ribbon and click on the **Parts Checkout** option.
- From the invoked dialog, fill out this form as outlined.
- Click on the **Accept** button.

Scan Checkout

The **Scan Checkout** routine was design for the easy and quick issuing of inventory items, and is designed to work with a barcode scanner. This routine will not only remove items from stock, but will also update the part's **Movement History** database.

The following illustrates the elements of the **Barcode Checkout** dialog screen.

The image shows a 'Barcode Checkout' dialog box with several sections and fields. Red lines point from text labels on the right to specific elements in the dialog:

- Reference ID (Scanned or Typed)**: Points to the 'Reference ID' text box containing 'SPRA00001'.
- Prepare for Barcode Scan**: Points to a barcode scanner icon next to the Reference ID field.
- Details of found Item**: Points to the 'Part Details' section showing 'Description: SPRAY LUBRICANT, Manufacturer: NORTHWEST EASY LUBES, Part No: WD-440'.
- Quantity Being Checked Out**: Points to the 'Quantity Checked Out' spinner box set to '2'.
- Reason for Checkout**: Points to the 'Checkout Reason' dropdown menu showing 'Work Order Usage'.
- Employee Checking Item Out**: Points to the 'Checked Out By' text box containing 'Murray, Fred' and the 'Select' button.
- Account Assignment**: Points to the 'Account' dropdown menu showing 'General Use'.
- Accept and Checkout Item**: Points to the 'Record Changes' button.

At the bottom of the dialog are two buttons: 'Record Changes' (with a floppy disk icon) and 'Close' (with a red X icon).

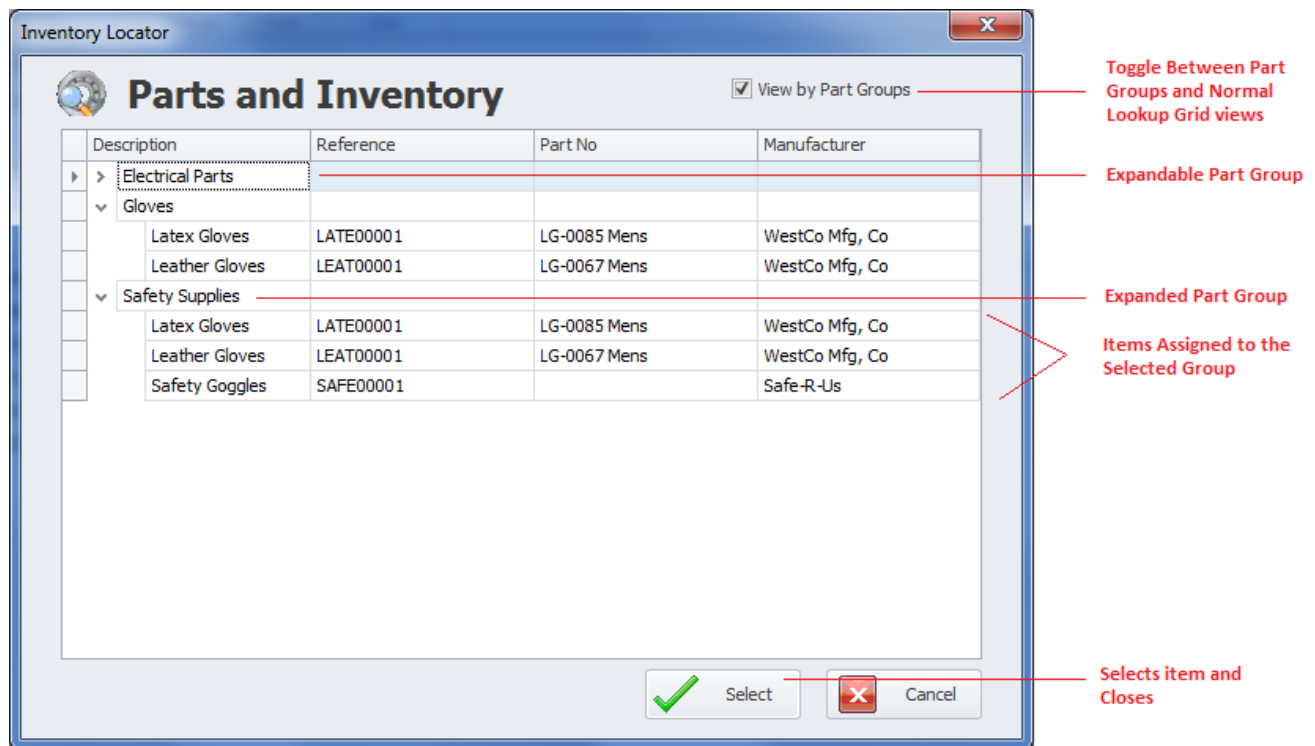
- **Reference ID** – This item locator field indicates the **Reference ID** assignment of the item being checked out. This value can be either scanned in with a barcode scanner or typed in manually. As the reference is entered, the program searches for a matching inventory record.
- **Scanner Button** – This button is adjacent to the **Reference ID** field, and is clicked in preparation of barcode scan.
- **Parts Details** – When an inventory item has been located, information about that item will be displayed here.
- **Quantity Checked Out** – This amount indicates the quantity of the selected item that will be checked out.
- **Checkout Reason** – Selected from the drop down, this allows you to assign the reason behind the item check out.
- **Checked Out By** – This alpha/numeric field allows you to record the person that is checking the item out. This field can contain up to 30 characters, and can also be set by using the **Select** button found here.
- **Account** – This allows you to assign the checkout to an account.
- **Record Changes** – Clicking this button performs the following:
 - Checks out the item and updates the inventory levels.
 - It creates a new parts **Movement History** record.
 - It clears all the fields of the dialog in preparation of additional checkouts.

- **Cancel** – Closes the dialog screen.

Parts Lookup

You can look up and select inventory items from the **Lookup** tab, but sometimes locating items arranged in **Part Groups** will streamline things, and simplify the lookup process. This is where you will want to use the **Parts Lookup** option.

The following illustrates the elements of the **Inventory Locator** dialog screen:



- **View by Parts Groups** – Toggles how the lookup grid is displayed.
 - **Checked** – When checked the inventory items are arranged in groups. Clicking on the > button opens or expands the group.
 - **Unchecked** – When unchecked, the grid is layout as found on most lookup dialogs used by the system.
- **Grid** – Contains a list of available inventory items.
- **Select** – Clicking this button accepts the selected item.

To access the Inventory Locator

- Move to the **Home** tab in the ribbon.
- Click on the **Parts Lookup** option.

Search

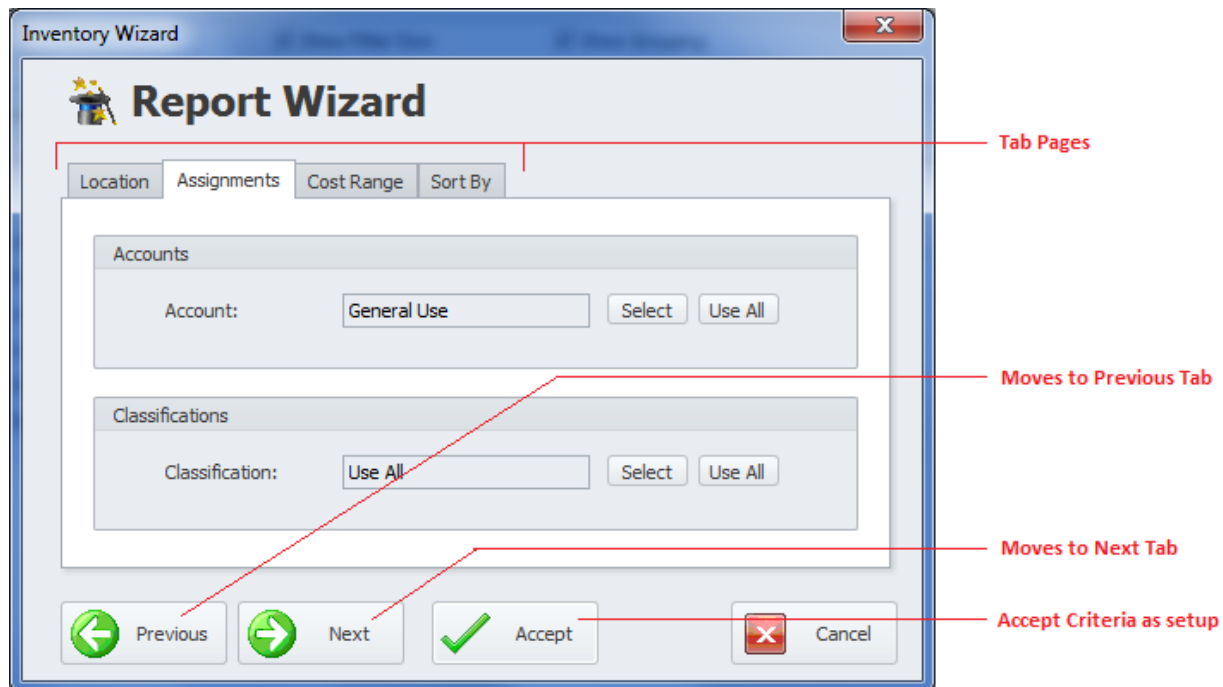
To perform a search on the **Parts and Inventory** database:

- 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 **Parts and Inventory** 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 illustrates the elements of the **Main Wizard** dialog screen.



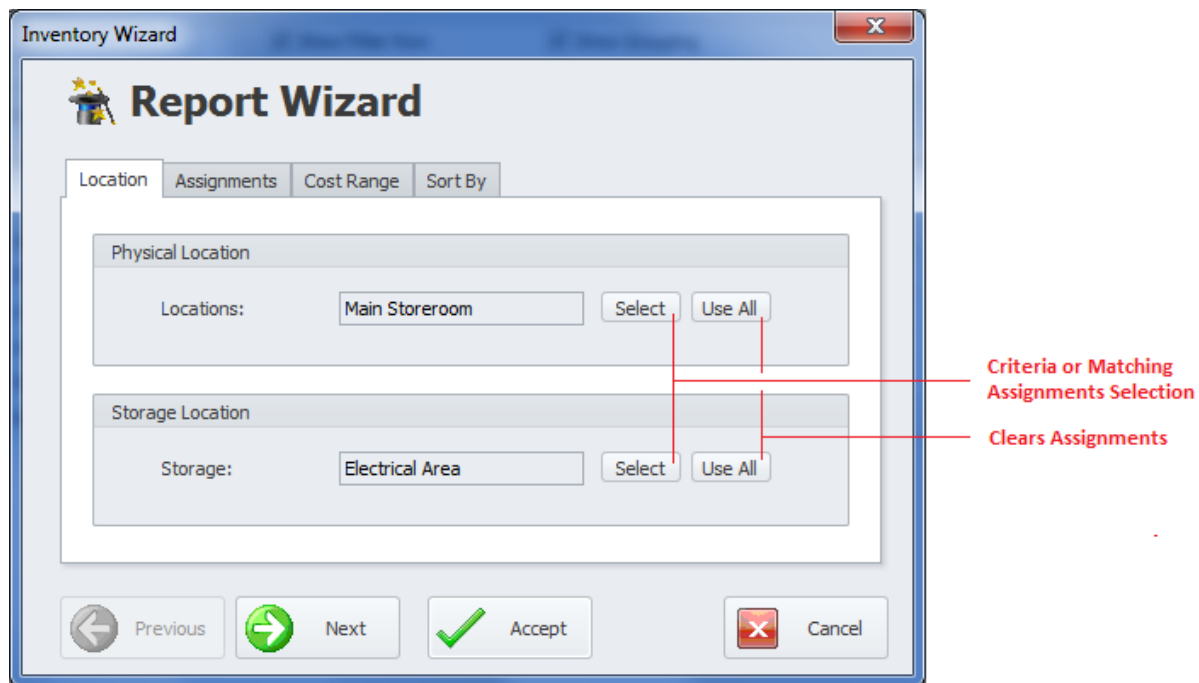
The following are some of the general elements of this wizard:

- **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.

When this wizard is used with the **Inventory Report** it contains an additional tab, and this is the **Cost Range** tab.

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:

Inventory Wizard

Report Wizard

Location Assignments Cost Range Sort By

Accounts

Account: General Use Select Use All

Classifications

Classification: Use All Select Use All

Criteria or Matching Assignments Selection

Clears Assignments

Previous Next Accept Cancel

- **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.

Cost Range Tab

When this wizard is used with the **Inventory Report** it contains an additional tab, and this is the **Cost Range** tab. With this tab you setup the unit price range of the items to report on.

The following illustrates the elements found on this tab:

Inventory Wizard

Report Wizard

Location Assignments **Cost Range** Sort By

Unit Cost Range

Equal To or Greater Than BUT Equal To or Less Than

5.00 100.00

☐ Ignore Unit Costs

Unit Cost Value Range Criteria

Ignore Unit Cost

Previous Next Accept Cancel

- **Equal To or Greater Than** – This is low point of the Unit Cost price range.
- **Equal To or Less Than** – This is the high point of the Unit Cost price range.
- **Ignore Unit Costs** – When checked unit costs are ignore and all items are returned.

Sort By Tab

There is only one element available on this tab.

- **Sort ... By** – This tells the program which field to sort the returned information by.

Accept

When all criteria is setup, move to and click on the **Accept** button.

Usage Report Wizard

This wizard is used with the **Parts Movement** and the **Checked Out** Reports.

The following illustrates the elements of this wizard:

- **Date Range Selection** – Returns movement records 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.
- **Inventory Items** – Allows you to return information on a single inventory item, or for all items. Assign the item by clicking on the **Select** button. Click on the item from this list and click **Select** button.
- **Activity Type** – Selectable from the drop down this allows to specify the activity type to report on. Checking the **Use All Types** button ignores the activity types,
- **Account Selection** - Allows you to return information on a single Account Assignment, or for all. Assign the item by clicking on the **Select** button. Click on the item from this list and click **Select** button.
- **Accept** – Accepts the criteria as setup, and creates the report.

Filtering Options

On the **Filtering** tab of the ribbon control, you'll find the following filtering options:

- **Filter Wizard** - Invokes the **Main Report -Filter Wizard** to assist in filtering inventory items. Please refer to the [Main Report -Filter Wizard](#) section for more information.
- **Understock Filter** – Filters the database to show all inventory items that have fallen below recommended inventory levels. Just click this option to perform the filter.
- **View All** – Filters the database to show all inventory items. Just click this option to perform the filter.
- **Filter by Location** – Allows you to select a Location Assignment to filter by. To perform this filter:
 - Click on the option in the ribbon. From the invoked dialog, select the item you want to filter by and click on the **Select** button.
- **Filter by Classes** – Allows you to select a Classification Assignment to filter by. To perform this filter:
 - Click on the option in the ribbon. From the invoked dialog, select the item you want to filter by and click on the **Select** button.
- **Selected** – Filters the database by all records that have the '**Selected**' checkbox checked. Just click this option to perform the filter.

Inventory Report

This report uses the **Main Report – Filter Wizard** for the creation of this report, and the records returned by the report.

Inventory Report									
Reference	Description	Part No	On Hand	Max Level	Min Level	Order Qty	Unit Cost	Extended Cost	Storage
DRUM00001	Drum Switch Allen-Brady	800T-77990	1.0	1.0	1.0	1.0	167.77	167.77	Electrical Area
LATE00001	Latex Gloves WestCo Mfg. Co	LG-0085 Mens	0.0	7.0	2.0	5.0	7.64	0	Safety Supplies Area
LEAT00001	Leather Gloves WestCo Mfg. Co	LG-0067 Mens	4.0	2.0	5.0	12.0	8.76	35.04	Safety Supplies Area
SAFE00001	Safety Goggles Safe-R-Us		3.0	7.0	2.0	5.0	6.43	19.29	

To create the **Inventory Report**:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Inventory Report** option.
- Follow the instructions as outlined in the [Main Report – Filter Wizard](#) section.

Report Wizard

This report uses the **Main Report – Filter Wizard** for the creation of this report, and the records returned by the report.

Wizard Report										
Reference	Description	Part No	Vendor	On Hand	Max Level	Min Level	Order Qty	Unit Cost	Storage	On Order
DRUM00001	Drum Switch Allen-Brady	800T-77990	Gardner and Denver	1.0	1.0	1.0	1.0	167.77	Electrical Area	
LATE00001	Latex Gloves WestCo Mfg. Co	LG-0085 Mens	Safety First and Last, Inc	0.0	7.0	2.0	5.0	7.64	Safety Supplies Area	
LEAT00001	Leather Gloves WestCo Mfg. Co	LG-0067 Mens	Gardner and Denver	4.0	2.0	5.0	12.0	8.76	Safety Supplies Area	

To create this report:

- 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.

Understock Report

This report shows all inventory items that have fallen below recommended inventory levels.

Under Stock Report - 7/10/2014										
Reference	Description	Part No	Vendor	On Hand	Max Level	Min Level	Order Qty	Unit Cost	Storage	On Order
LATE00001	Latex Gloves WestCo Mfg. Co	LG-0085 Mens	Safety First and Last, Inc	0.0	7.0	2.0	5.0	7.64	Safety Supplies Area	
LEAT00001	Leather Gloves WestCo Mfg. Co	LG-0067 Mens	Gardner and Denver	4.0	2.0	5.0	12.0	8.76	Safety Supplies Area	

To create the **Understock Report**:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Understock Report** option.

Parts Movement Report

After your parts room has been operational for some time, you may want to know what parts are just sitting there, taking up space, and costing you at tax time. Once this information is known, these parts can be removed from inventory, saving money and space.

Movement Report 6/10/2014 - 7/10/2014						
Date	Description	Activity	Quantity	Checked Out By	Account	Reference
1/23/2011	Spray Lubricant	Created	0	Not Assigned		SPRA00001
1/24/2011	Safety Goggles	Work Order Usage	0			SAFE00001

To create the Parts Movement Report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Parts Movement** option.
- Follow the instructions as outlined in the [Usage Report Wizard](#) section.

Checked Out Report

The **Checked Out** report will report on all items that have been checked out from a given date range, and other criteria.

This report can be useful when you want to know which items were removed from the stock room over a weekend for example, and can also assist in reordering these items.

Checkout Report 6/10/2014 - 7/10/2014									
Date	Qty	Reference	Description	Part No	Account	Activity	User Name	Unit Cost	Total
1/23/2011		SPRA00001	Spray Lubricant	WD-440		Created	Not Assigned		
1/24/2011		SAFE00001	Safety Goggles			Work Order Usage			

To create the Checked Out Report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Checked Out** option.
- Follow the instructions as outlined in the [Usage Report Wizard](#) section.

Report by Groups

This reports returns all records that belong to an inventory part group.

SAFETY SUPPLIES Inventory Group Report										
Reference	Description	Part No	Vendor	On Hand	Max Level	Min Level	Order Qty	Unit Cost	Storage	On Order
LATE00001	Latex Gloves WestCo Mfg. Co	LG-0085 Mens	Safety First and Last, Inc	0.0	7.0	2.0	5.0	7.64	Safety Supplies Area	
LEAT00001	Leather Gloves WestCo Mfg. Co	LG-0067 Mens	Gardner and Denver	4.0	2.0	5.0	12.0	8.76	Safety Supplies Area	

To create the Report by Groups report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Report by Groups** option.
- From the invoked lookup dialog, move to the grid and click on the group of your choice.
- Click on the **Select** button.

Equipment Assignment Reports

This reports returns all records that are assigned to an asset. This one is different that the BOM report as outlined in the Equipment and Assets module, and is based on the **Primary Equipment** field.

600 PSI HIGH PRESSURE AIR COMPRESSOR Equipment Report										
Reference	Description	Part No	Vendor	On Hand	Max Level	Min Level	Order Qty	Unit Cost	Storage	On Order
DRUM00001	Drum Switch Allen-Brady	800T-77990	Gardner and Denver	1.0	1.0	1.0	1.0	167.77	Electrical Area	

To create the Equipment Assignment report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Equipment Assignment** option.
- From the invoked lookup dialog, move to the grid and click on the asset record of your choice.
- Click on the **Select** button.

Print Barcodes

You can print barcode labels with this module. To print barcodes:

- 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 **Print Barcode** option.
- Follow the instructions as outlined in the [Printing Barcode Labels](#) section of the [Common Features](#) chapter.

Purchasing and Receiving

Use this module for all your purchasing and receiving needs. Create quotation requests, purchase requisitions and purchase orders. Track backorders, receive items and update your inventory levels.

The screenshot displays the 'Purchasing and Receiving' software interface. The main window is titled 'Purchasing and Receiving'. It features a menu bar with 'File', 'Home', 'Go', 'Filters', 'Mail', and 'Reports'. Below the menu is a toolbar with icons for 'Add New', 'Save Changes', 'Understock Items', 'Aging POs', 'Blanket POs', 'Receive Items', 'Document Notes', 'Document Comments', 'Search', and 'Exit Module'. A left sidebar contains shortcuts for 'Purchasing and Receiving', 'Preview Current Document', 'Preview Request for Quotation', 'Receive All Items', 'Quick Filters', 'Filter Wizard', and 'Default Sort'. The main area has tabs for 'Lookup', 'Details', 'Status - Order Information', and 'Supplier - Ship To - User - Special'. The 'Status - Order Information' tab is active, showing 'General Information' and 'Document Assignments' sections. The 'General Information' section includes fields for Date (2/17/2011), Doc Number (000001), Check, Requester (Eliot, Kate), Project, Date Needed, Classification, Cost Center, Asset (600 PSI High Pressure A...), and Priority (Low). The 'Document Assignments' section includes Terms (Net 30), Buyer (Eliot, Kate), F.O.B. (Our Plant), Carrier, and a Calculate Total button. Below these is a 'Materials List' table with columns: Qty, Part No, Description, Unit Type, Unit Price, Account, Taxes, Freight Costs, and Other Costs. The table contains two rows: 1 quantity of 800T-77990 Drum Switch - Allen-Brady at 167.77, and 12 quantity of LG-0067 Mens Leather Gloves - Westco, Mfg at 8.76. The total costs are 307.89.

With this module you can also assign each of your purchase orders to a variety of different groups for reporting purposes. These include Cost Center, Used On and Projects. A complete note file can also be attached to each order to provide an almost unlimited amount of information about a specific order.

Differences between Purchase Requisition and Orders

When entering your documents, there is basically no difference between a Purchase Requisition, Purchase Order or Quotation Request. This is also true when printing any of these three documents. The only real difference is found on the Status / Order Information tab, and placing the appropriate check at the **Document Type** Status area. Here you have two options, **Purchase Requisitions** or **Purchase Order**.

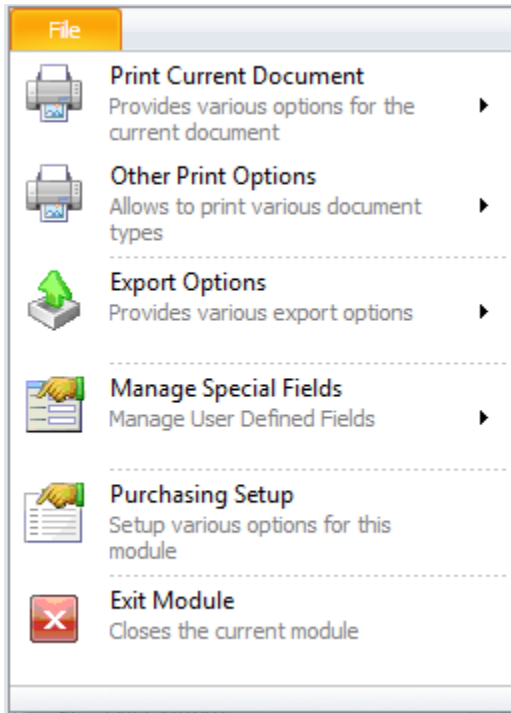
The screenshot shows a software interface for selecting a document type. It features a light blue background with a white rectangular area in the center. On the left side of the interface, there are two checkboxes: 'Blanket Purchase Order' and 'Taxable', both of which are currently unchecked. Below these checkboxes, the text 'Document Type' is displayed. The central white area contains two radio button options: 'Purchase Requisition' and 'Purchase Order'. The 'Purchase Order' option is selected, indicated by a yellow dot inside its radio button, and it is also highlighted with a dashed border.

Printed Documents

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

The **Purchasing and Receiving** module allows you to setup various options for use with this module and on printed documents.

Simplicity Software Technologies Inc | Purchasing Setup



- Move to the **Purchasing and Receiving** module.
- Click on the **File** button in the ribbon and click the **Purchasing Setup** option.

General Tab

This tab allows you to specify the document number format, decimal places to use and allows you to turn certain print elements on or off.

The following illustration shows the elements of this tab:

- **Next Document (PO) Number** -The number here specifies the next sequential number to use in the creation of a new purchase document. These numbers use the following format: *yymm – xx*.

Where yy equals the year of the document creation mm equals the month of document creation, and xx is a sequential number.

- **Use Auto Prefix** – A check here allows the use of the prefix just outlined. Unchecked, the program defaults to just sequential numbers.
- **Decimal Places to show for Purchase Items** - This specifies how many decimal places to use on the purchase document. To set, use the spin buttons attached to this field to increase or decrease the value. Acceptable values range from 2 to 4.
- **Print Account Information on Documents** – This setting applies to the purchase items list. When enabled, it adds an **Account** column to the items list.
- **Print Unit Type Information on Documents** – This setting applies to the purchase items list. When enabled, it adds a **Unit Type** column to the items list.
- **Warn when printing duplicate documents** - When checked, it invokes a warning message when a purchase document is being printed for a repeated time.

Comments Tab

This tab allows you to specify the comments that show up on printed documents. The following illustration shows the elements of this tab:

The screenshot shows a software window with several tabs: General, Comments (selected), Ship To, ISO, Custom PO, Custom Reqs, Approval, and User Fields. The 'Comments' tab is active, displaying two text input areas. The top area is titled 'Requisition Comments' and contains the text 'Approvals:' followed by three horizontal lines for input. A red arrow points from this area to the label 'Comments to show on Purchase Requisitions'. The bottom area is titled 'Purchase Order Comments' and contains the text 'Please include our Purchase Order Number on all invoices and other documents relating to this Purchase Order.' A red arrow points from this area to the label 'Comments to show on Purchase Orders'.

- **Requisition Comments** – This alpha/numeric field has no size limitation and is used in the comments section of Purchase Requisitions. Many organizations use this section for approvals, but it can be used however you see fit.
- **Purchase Order Comments** – This alpha/numeric field has no size limitation and is used in the comments section of Purchase Orders.

Ship To Tab

This tab allows you to specify the default shipping address for orders.

This alpha/numeric field has no size limitation and is used in the Ship To section of purchase documents. The following illustration shows the elements of this tab:

General Comments **Ship To** ISO Custom PO Custom Reqs Approval User Fields

Default Shipping Address

ABC Company
123 South Main Street
My City, MyState 90000
677-776-0132

Documents Default Shipping Address

ISO Tab

This tab allows you to specify ISO document control numbers to be used with printed documents. The following illustration shows the elements of this tab:

General Comments Ship To **ISO** Custom PO Custom Reqs Approval User Fields

Purchase Requisition Control Number

778-2345

Purchase Order Control Number

778-9876

☒ Include ISO Control Numbers on documents

Purchase Requisition ISO Control Number

Purchase Orders ISO Control Number

Include ISO Numbers on Printed Documents

- **Purchase Requisition Control Number** – This alpha/numeric field can contain up to 30 characters and represents the ISO Control Number used for purchase requisitions.
- **Purchase Order Control Number** – This alpha/numeric field can contain up to 30 characters and represents the ISO Control Number used for purchase orders.
- **Include ISO Control Numbers on documents** – When checked, ISO control numbers will be printed on their associated documents as these documents are printed. Unchecked, these control numbers will be omitted from printed documents.

Custom PO Tab

This tab allows you to customize the elements that are printed on **Purchase Orders**. The following illustration shows the elements of this tab:

General Comments Ship To ISO Custom PO Custom Reqs Approval User Fields

Document Style: Header Style 1 (PO Number, Date Ordered) ▾

Default Print Orientation: Portrait ▾

Tables - Background Color: -983041 ☒ Use Color

☒ Include Info Line: Buyer, FOB, Terms, Ship By

☐ Include Info Line: Requester, Project, Classification, Cost Center

☐ Include Info Line: User Defined Fields

☒ Print Borders Around Vendor and Ship To Information

☐ Print Borders Around Info Line Items

☒ Print Borders Around Purchase Items

Header Style to Use

Default Print Orientation

Border Color Assignment

Allows the use of Border Color

Elements to include or exclude on printed documents

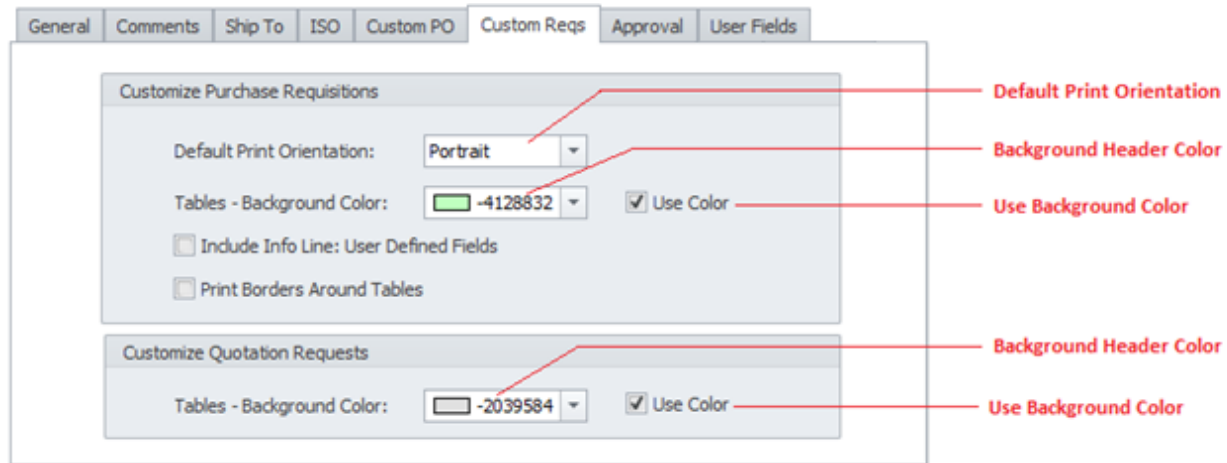
- **Document Style** – This setting allows you to specify the document header style to use on printed documents. The following illustrates the two possible header styles:

HEADER STYLE ONE	HEADER STYLE TWO								
<p>PURCHASE ORDER</p> <p>P.O. Number: 000001 Date Ordered: 2/18/2011</p>	<p>PURCHASE ORDER</p> <table border="1"> <tr> <th>PO Number</th><th>Order Date</th></tr> <tr> <td>000001</td><td>2/18/2011</td></tr> <tr> <th>Confirmation No</th><th>Date Promised</th></tr> <tr> <td>3456711</td><td></td></tr> </table>	PO Number	Order Date	000001	2/18/2011	Confirmation No	Date Promised	3456711	
PO Number	Order Date								
000001	2/18/2011								
Confirmation No	Date Promised								
3456711									

- **Default Print Orientation** – This setting allows you to specify the default print orientation to use on Purchase Orders. Options are Portrait or Landscape.
- **Tables Background Color** – Selectable from the attached color picker, you can specify the color to use in the header section of the documents tables.
- **Use Color** – When checked, the document tables will use the color as specified above. Unchecked, no color will be applied to these tables.
- **Include Info Line: Buyer, FOB, Terms, Ship By** – When checked this information will be included on printed documents.
- **Include Info Line: Requester, Project, Classification, Cost Center** – When checked this information will be included on printed documents.
- **Include Info Line: User Defined Fields** – When checked this information will be included on printed documents.
- **Print Borders Around Vendor and Ship To Information** – When selected, will print a solid border around this information on the documents.
- **Print Borders Around Info Line Items** – When selected, will print a solid border around this information on the documents.
- **Print Borders Around Purchase Items** – When selected, will print a solid border around this information on the documents.

Custom Reqs Tab

This tab allows you to customize the elements that are printed on **Purchase Requisitions** and **Quotation Requests** (RFO). The following illustration shows the elements of this tab:



Customize Purchase Requisitions

- **Default Print Orientation** – This setting allows you to specify the default print orientation to use on **Purchase Requisitions**. Options are Portrait or Landscape.
- **Tables Background Color** – Selectable from the attached color picker, you can specify the color to use in the header section of the documents tables.
- **Use Color** – When checked, the document tables will use the color as specified above. Unchecked, no color will be applied to these tables.
- **Include Info Line: User Defined Fields** – When checked this information will be included on printed documents.
- **Print Borders Around Tables** – When selected, will print a solid border around this information on the documents.

Customize Quotation Requests

- **Tables Background Color** – Selectable from the attached color picker, you can specify the color to use in the header section of the documents tables.
- **Use Color** – When checked, the document tables will use the color as specified above. Unchecked, no color will be applied to these tables.

Approval Tab

This tab allows you to setup the Approval Line that will be included on printed Purchase Orders.

- **Use Approval Line on Purchase Orders** – When checked, approval line will be displayed on printed PO documents.
- **Approval Line** – There is no size limitation to this alpha/numeric field. The text here will be displayed as the approval line of printed purchase orders.

The following illustration shows the elements of this tab:

General Comments Ship To ISO Custom PO Custom Reqs **Approval** User Fields

☒ Use Approval Line on Purchase Orders

Approval Line

Document must be signed to authorize purchase

Approval Mail Recipient (From this computer only)

Email Address: managerPO@simsofttech.com

Include Approval Line on Printed POs

Approval Line to include on Printed POs

Email Address to send Approval Request

Approval Mail Recipient (Local Setting/From this Computer Only)

- **Email Address** – This field would represent the address of the email recipient that will be used in the email approval process.

NOTE: This is a local setting and only affects emails being sent from this computer.

User Fields Tab

This tab allows you to set the titles to assign to the four user defined fields. These fields can be set to print on purchasing documents.

General Comments Ship To ISO Custom PO Custom Reqs **Approval** **User Fields**

User Defined Fields Headings

User Field 1 User Field 1

User Field 2 User Field 2

User Field 3 User Field 3

User Field 4 User Field 4

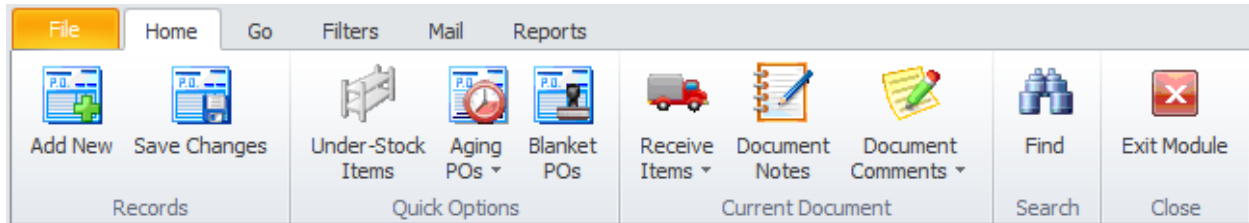
User Defined Fields Titles

- **User Field 1 thru User Field 4** – These four user defined fields titles can contain up to 30 alpha/numeric characters each.

Ribbon Control

The comprehensive functionality of the **Purchasing and Receiving** 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.

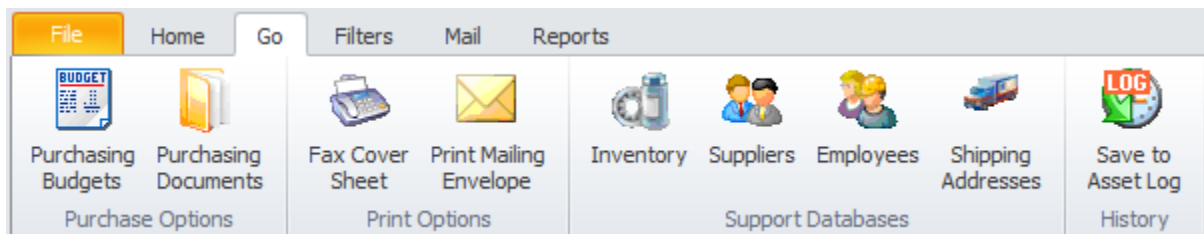
HOME TAB



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

- **Add New** – Creates a new purchase 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).
- **Under-Stock Items** – View understock item and create requisitions.
- **Aging POs** – This allows you to filter the database by overdue purchase documents. Options include **Over 30 days**, **Over 60 days**, **Over 90 days**, and **View All Over Due**.
- **Blanket POs** – View and Edit **Blanket Purchase Orders**.
- **Receive Items** – Allows you to receive items against the current document and update inventory levels. Options are:
 - **Receive All Items** – Steps you through all items ordered, receiving one item at a time.
 - **Receive Selected Item** – Receives only the currently selected item.
- **Document Notes** - Allows the viewing and editing of the notes assigned to the current document.
- **Document Comments** – Allows you to edit the notes section of the current document. Options include: **Purchase Order Comments**, **Requisition Comments**.
- **Search** - Invokes the search/find routine on the Lookup Grid.
- **Exit Module** - Close and exits the module.

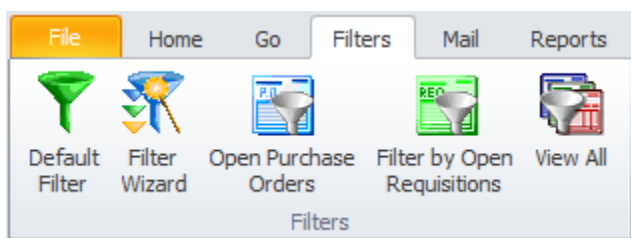
GO TAB



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

- **Purchasing Budgets** – Create and manage purchasing related budgets.
- **Purchasing Documents** – Branches control to the Purchasing Documents (Management) database.
- **Fax Cover Sheet** – Create and Print a Fax cover sheet.
- **Print Mailing Envelope** – Allows you to setup and print #10 envelopes.
- **Inventory Database** – Opens the Parts and Inventory database (Lookup Screen).
- **Suppliers** – Opens the Contacts and Vendors database (Lookup Screen).
- **Employees Database** – Opens the Mechanics and Employee database (Lookup Screen).
- **Save to Asset Log** – Saves a summary of the purchase to the assigned asset's history log.

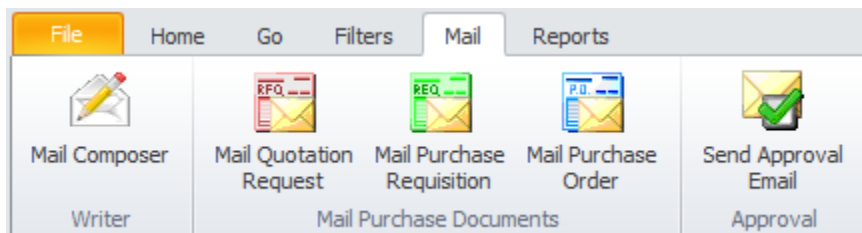
FILTERS TAB



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

- **Default Filter** – Applies the default filter to the purchasing documents (All Open).
- **Filter Wizard** – 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 for more information.
- **Open Purchase Orders** – Filters the database by all open purchase orders.
- **Filter by Open Requisitions** – Filters the database by all open purchase requisitions.
- **View All** – Removes all filters allowing you to view every document in the database.

MAIL TAB

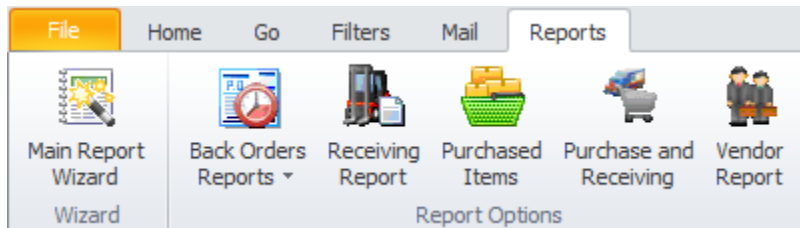


The following are the elements on the **Mail** ribbon tab, reading left to right:

- **Mail Composer** – Opens the built in Email Composer.
- **Mail Quotation Request** – Opens the built in Email Composer with the current document attached, and in the form of a Quotation Request.
- **Mail Purchase Requisition** – Opens the built in Email Composer with the current document attached, and in the form of a Purchase Requisition.

- **Mail Purchase Order** – Opens the built in Email Composer with the current document attached, and in the form of a Purchase Order.
- **Send Approval Email** – Send an Approval Email notice to the recipient as outlined in the **Purchasing Setup**.

REPORTS TAB



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

- **Report Wizard** - Invokes the main **Report/Filter Wizard** to assist in creating the report.
- **Back Orders Reports** – Reports on items that have yet to be received, and are overdue. Options include: **Aging From Today, Over 30 Days, Over 60 Days** and **Over 90 Days**.
- **Receiving Report** – Uses a wizard to create a report on items received.
- **Purchased Items** – Uses a wizard to create a report on items purchased.
- **Purchase and Receiving** - Invokes the main **Report/Filter Wizard** to assist in creating the report.
- **Vendor Report** – Reports on purchase documents made with a selected supplier, and a given date range.

Features of the Purchasing and Receiving Module

There are many features of the **Purchasing and Receiving** 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 documents by grouping, filtering and sorting them. All the records in the current filter are located in the grid found here. To select a record and make it the active record, the user needs only to click on the item from within the grid. Once selected the user can click on the other tabs to view or edit the record itself.

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

The screenshot shows the 'Lookup' tab interface. At the top, there are tabs: 'Lookup', 'Details', 'Status', and 'Order Information'. Below the tabs, there is a 'Lookup' button and a search field. To the right of the search field are two checkboxes: 'Show Filter Row' and 'Show Grouping'. Below these is a 'Grouping Area' with a text prompt 'Drag a column header here to group by that column'. Below the grouping area is a table with columns: 'PO Num', 'Ordered', 'Promised', 'Classification', and 'Vendor Reference'. The table contains three rows of data. Annotations with red arrows point to various elements: 'Barcode Scan and Lookup' points to the 'Lookup' button; 'Show/Hide Filter Row' points to the 'Show Filter Row' checkbox; 'Show/Hide Grouping' points to the 'Show Grouping' checkbox; 'Grouping Area' points to the area above the table; 'Filtering Row' points to the first row of the table; 'Database Records or Rows' points to the data rows of the table; 'Status Indicator' points to a small icon in the first column of the first row; and 'Priority Indicator' points to a small icon in the second column of the first row.

	PO Num	Ordered	Promised	Classification	Vendor Reference
	000001	2/18/2011			GARD00001
	000002				GARD00001
	000003	12/22/2010			SAFE00001

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. Apply special attention to the following:

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

Details Tab

Under the **Details** tab you can setup the main elements of your purchase document, along with adding and removing items for purchase and more.

General Information

This section allows you to specify general information about the current purchasing document. This information is found in the **General Information** group, location within the **Details** tab.

The following illustrates the elements found in this section:

The screenshot shows the 'General Information' section. It contains several fields: 'Date' (with a dropdown menu showing '2/17/2011'), 'Doc Number' (with a text field showing '000001'), a 'Check' button, 'Requester' (with a text field showing 'Eliot, Kate'), and 'Date Needed' (with a dropdown menu). Annotations with red arrows point to each of these elements: 'Creation Date' points to the 'Date' field; 'Document Number' points to the 'Doc Number' field; 'Check if Unique' points to the 'Check' button; 'Name of Requester' points to the 'Requester' field; and 'Date Needed By' points to the 'Date Needed' field.

Date

This date only type field would indicate the document's creation date.

Doc Number

This field can contain up to 25 alpha/numeric characters and is normally created for you by the application. It uses the following format: YYMM-###, where YY is the year of document 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 but highly recommended. To verify that it is unique you can click on the **Check** button adjacent to this field.

Requester

This field would indicate the person requesting the items to be purchased. To set this field, click on the ellipse (...) button adjacent to this field. From the invoked Lookup dialog, move to the grid and select the record you want to assign. Finish by clicking on the **Select** button.

Date Needed

This is a date only field, and would indicate the date you require the purchase items by. Set this field by using the attached drop down calendar.

Document Assignments

This section allows you to specify general assignments to the current purchasing document. This information is found on the **Document Assignments** group, location within the **Details** tab.

The following illustrates the elements found in this section:

The screenshot shows the 'Document Assignments' section with four fields, each with a dropdown menu and a 'Manage' button:

- Terms:** Dropdown menu shows 'Net 30'. Below it is a red label 'Payment Terms'.
- Buyer:** Text field shows 'Elliot, Kate' followed by an ellipse (...) button and 'F.O.B.'. Below it is a red label 'Buyer's Name'.
- F.O.B.:** Dropdown menu shows 'Our Plant'. Below it is a red label 'Freight on Board'.
- Carrier:** Dropdown menu shows 'USPS'. Below it is a red label 'Carrier/Ship By'.

Terms

This alpha/numeric field can include up to 30 characters and would indicate the payment terms of the purchase document. You can set this field by directly typing in it, or select an item from the attached drop down list.

Buyer

This field would indicate the buyer assignment as it applies to the current document. To set this field, click on the ellipse (...) button adjacent to this field. From the invoked Lookup dialog, move to the grid and select the record you want to assign. Finish by clicking on the **Select** button.

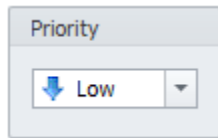
F.O.B (Freight on Board)

This alpha/numeric field can include up to 30 characters and would indicate the FOB field of the purchase document. You can set this field by directly typing in it, or select an item from the attached drop down list.

Carrier

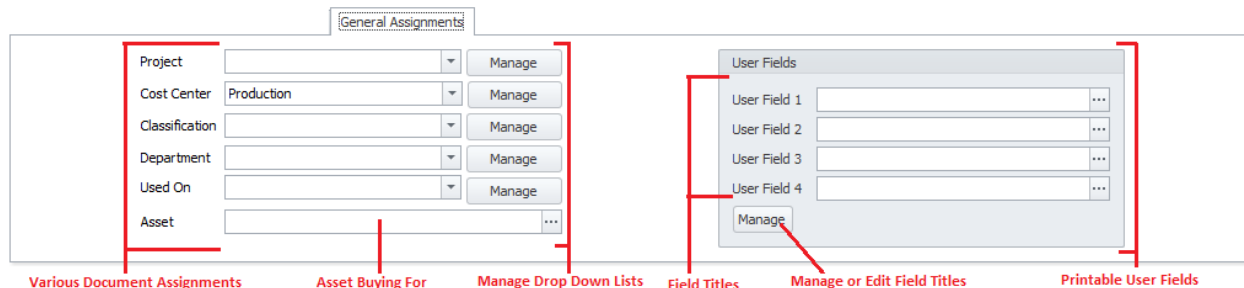
This alpha/numeric field can include up to 30 characters and would indicate the Carrier field of the purchase document. You can set this field by directly typing in it, or select an item from the attached drop down list.

Priority


 A screenshot of a 'Priority' dropdown menu. The word 'Priority' is at the top. Below it is a dropdown box with a blue arrow icon on the left and the word 'Low' in the center. A small downward-pointing triangle is on the right side of the dropdown box.

You can assign your document a priority indicator. Options include: **Urgent**, **High**, **Normal** and **Low**. To assign a **Priority** to your document: Click on the down arrow attached to this field and click on the value you want to assign from those listed.

General Assignments


 A screenshot of the 'General Assignments' form. The form has a title bar 'General Assignments'. It contains several fields: 'Project', 'Cost Center', 'Classification', 'Department', 'Used On', and 'Asset'. Each of the first five fields has a dropdown arrow and a 'Manage' button to its right. The 'Asset' field has a text input area and an ellipsis button. To the right of these fields is a 'User Fields' section with four 'User Field' entries, each with a text input and an ellipsis button, and a 'Manage' button at the bottom. Red lines and labels are used to highlight specific parts: a red box around the first five fields is labeled 'Various Document Assignments'; a red line under the 'Asset' field is labeled 'Asset Buying For'; a red box around the 'Manage' buttons is labeled 'Manage Drop Down Lists'; a red line under the 'User Fields' section is labeled 'Field Titles'; a red arrow pointing to the 'Manage' button in the 'User Fields' section is labeled 'Manage or Edit Field Titles'; and a red box around the 'User Fields' section is labeled 'Printable User Fields'.

Project

This alpha/numeric field can include up to 30 characters and would indicate the project this document is assigned to. You can set this field by directly typing in it, or select an item from the attached drop down list.

Cost Center

This alpha/numeric field can include up to 30 characters and would indicate the cost center this document is assigned to. You can set this field by directly typing in it, or select an item from the attached drop down list.

Classification

This alpha/numeric field can include up to 30 characters and would indicate the classification this document is assigned to. You can set this field by directly typing in it, or select an item from the attached drop down list.

Department

This alpha/numeric field can include up to 30 characters and would indicate the department this document is assigned to. You can set this field by directly typing in it, or select an item from the attached drop down list.

Used On

This alpha/numeric field can include up to 30 characters and would indicate the possible uses of the items within this document. You can set this field by directly typing in it, or select an item from the attached drop down list.

Asset

This field would indicate the Asset Assignment as it applies to the current document. To set this field, click on the ellipse (...) button adjacent to this field. From the invoked Lookup dialog, move to the grid and select the record you want to assign. Finish by clicking on the **Select** button.

User Fields

There are four **User Definable** fields that can be used, and also printed on documents. The titles of these fields can be defined in the **Purchasing Setup**, or by clicking on the **Manage** button found here. The fields can contain up to 30 alpha/numeric characters each. Please review the section [Purchasing Setup](#) for more information.

Supplier – Shipping

This section allows you to specify who to purchase from, specify the shipping address information, and setup the four user defined fields. This information is found on the **Supplier – Ship To - User** tab, location within the **Details** tab.

Vendor (Supplier)

This field supplies information on the vendor being used to purchase items from. Only one supplier can be assigned to a single purchase document. To set this vendor, click on the **Select** button found in this area. From the invoked Lookup dialog, move to the grid and select the record you want to assign. Finish by clicking on the **Select** button.

Ship To

This alpha/numeric field has no size limitation as is used to provide shipping information to the supplier. You can directly type in this information in the box provided, or select it as outlined next.

To insert default shipping information as supplied in the Purchasing Setup

- Move to the **Ship To** group, and click on the **Insert Default** button.

To insert the requester's name into the Ship To information

- Move to the **Ship To** group and click on the **Insert Requester** button.

To insert the shipping address from a database of predefined addresses

- Move to the **Ship To** group and click on the **Select** button.
- Move to the grid and select the record you want to use.

- Click on the **Select** button.

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. This information is found on the **Special** tab, location within the **Details** tab.

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.

For more information about this feature please refer to the [Special Fields](#) section of the [Common Features](#) chapter.

Materials List

This section allows you to manage the items that will be purchased using the currently selected document. The **Materials List** group is found near the bottom of the **Details** tab.

The following illustrates the elements found in this section:

The screenshot shows the 'Materials List' window. On the left, there is a vertical toolbar with buttons: 'Add Part', 'View Part', 'Add Non-Stock', 'Remove Part', and 'Save Items'. Red lines point from these buttons to labels: 'Add Stock Item' (from 'Add Part'), 'View Details on Selected Item' (from 'View Part'), 'Add a Non-Stock Item' (from 'Add Non-Stock'), 'Remove Selected Item' (from 'Remove Part'), and 'Save Changes to Materials List' (from 'Save Items'). The main area contains a table with columns: Qty, Part No, Description, Unit Type, Unit Price, and Account. It lists two items: '1 800T-77990 Drum Switch - Allen-Brady' and '12 LG-0067 Mens Leather Gloves - Westco, Mfg'. Below the table is a red text prompt '<< Purchase Items List >>'. On the right, there are fields for 'Taxes', 'Freight Costs' (35), 'Other Costs', 'Calculate Total' (307.89), and 'Assign Item Account'. Red lines point from these fields to labels: 'Applied Taxes' (from 'Taxes'), 'Shipping Costs' (from 'Freight Costs'), 'Other Costs' (from 'Other Costs'), 'Calculate Total Costs' (from 'Calculate Total'), and 'Assign Purchase Item to an Account' (from 'Assign Item Account').

To add Stocked Items to the Materials List (Purchase Items)

- Move to the **Details** tab and locate the **Materials List** group.
- Click on the **Add Part** button.
- From the invoked **Parts and Inventory** Lookup, move to the grid and select the record you want to add. *Note: This module has its own Lookup, and allows you to include information about the item being added.*
- Move to the **Part to Be Added** section of the Lookup dialog, and complete this information.
 - **Part Description** – This is an alpha/numeric field with a size limitation of 75 characters.
 - **Part Number** - This is an alpha/numeric field with a size limitation of 40 characters
 - **Quantity** - Enter the amount that you wish to purchase. This field will only accept integer (whole numbers) values, and you can use the spin control to set this value.
 - **Unit Cost** – This a floating point number field and should represent the item's unit price. You can use the attached calculator to set this value.
 - **Account** – This is an alpha/numeric field with a size limitation of 30 characters. You can either type directly into this field, or select a value from the attached drop down list.
 - **Unit Type** – This is an alpha/numeric field with a size limitation of 30 characters. You can use the attached drop down list to help set this value

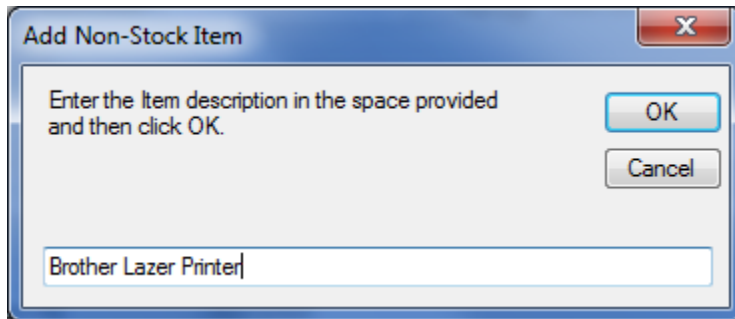
The 'Part to be Added' dialog box contains the following fields and controls:

- Part Description:** Text field containing 'Drum Switch - Allen-Brady'.
- Part Number:** Text field containing '800T-77990'.
- Quantity:** Spin control set to '1'.
- Unit Cost:** Text field with a dropdown arrow, containing '167.77'.
- Account:** Dropdown menu with 'General Use' selected.
- Unit Type:** Dropdown menu with 'Each' selected.
- Manage** button.

- Click on the **Select** button.
- Move the record you just added, and double click in columns of the grid, and edit these values.
- Click on the **Save Items** button to save the changes.

To add a Non-Stock Item to the Materials List

- Move to the **Details** tab, and locate the **Materials List** group.
- Click on the **Add Non-Stock** button.



- From the invoked **Add Non-Stock Item** dialog, move to the text box provided and enter a description for this item. Description fields can contain up to 75 alpha/numeric characters.
- Click on the **OK** button.
- Move to the various columns in the grid showing the item you just added. Double clicking within these columns will invoke its editor. Edit the values with the information you want to assign.
 - **Qty** - Enter the amount that you wish to purchase. This field will only accept integer (whole numbers) values.
 - **Part No** – This is an alpha/numeric field with a size limitation of 40 characters.
 - **Description** – This is an alpha/numeric field with a size limitation of 75 characters.
 - **Unit Type** – This is an alpha/numeric field with a size limitation of 30 characters.
 - **Unit Price** – This a floating point number field and should represent the item’s unit price.
 - **Account** – This is an alpha/numeric field with a size limitation of 30 characters. You can either type directly into this field, or select a value from the attached drop down list.
- Click on the **Save Items** button to save the changes.

To Remove a Part from the Purchase List

- Move to the **Details** tab and locate the **Materials List** group.
- Move to and select the Item you want to remove from within the grid.
- Move to and click on the **Remove Part** button.
- When prompted about removing the item, click the **Yes** button.

To view information on Stocked Item in your Purchase List

- Move to the **Details** tab and locate the **Materials List** group.
- Move to and select the Item you want to view information on from within the grid.
- Click on the **View Part** button.

Editing Taxes, Freight and Other Costs

To edit or include the taxes, freight, and other costs as it relates to the current document:

- Move to the **Details** tab and locate the **Materials List** group.
- Move to the **Taxes** field and edit this numeric only field. You can use the attached calculator to assist editing this field.

- Move to the **Freight Costs** field and edit this numeric only field. You can use the attached calculator to assist editing this field.
- Move to the **Other Costs** field and edit this numeric only field. You can use the attached calculator to assist editing this field.

Calculate the Total Charges of the current purchase document

To calculate the total on all record charges as it applies to the current purchase document (order items, taxes, etc.):

- Move to the **Details** tab and locate the **Materials List** group.
- Click on the **Calculate Total** button.

Saving Purchase Items Information

Ensure you save your changes when editing and adding items to the **Materials List** section. To save your changes:

- Move to and click on the **Save Changes** option in the ribbon, or
- Move to and click on the **Save Items** button in the **Material List** section.

Status – Order Information Tab

Under the **Status – Order Information** tab you can setup the status, approval and track ordering information.

Document Type

This section allows you to switch between **Purchase Requisition** and **Purchase Order** types, and allows setting other document information. This information is found in the **Document Type** group of the **Status – Order Information** tab.

The following illustrates the elements found in this section:

The screenshot shows the 'Document Type' section of the 'Status – Order Information' tab. It includes the following elements:

- Blanket Purchase Order**: A checkbox with a red line pointing to it from the label 'Indicates a Blanket PO'.
- Taxable**: A checkbox with a red line pointing to it from the label 'Indicates PO is Taxable'.
- Document Type**: A group containing two radio buttons:
 - Purchase Requisition**: A radio button with a red line pointing to it from the label 'Current Document Type'.
 - Purchase Order**: A radio button with a red line pointing to it from the label 'Current Document Type'.

- **Blanket Purchase Order** – Checking this checkbox would indicate that the current purchase document is part of, or is a blanket Purchase Order.

- **Taxable** – Checking this checkbox would indicate that current purchase document is taxable.
- **Document Type** – This is where you change a document from one type to another. Switch between types by clicking on the appropriate option. Options include:
 - **Purchase Requisition** - This (**REQ**) is a precise document generated to notify the purchasing department of items it needs to order, their quantity, and the time frame that will be given in the future. It may also contain the authorization to proceed with the purchase. It is also called a *Purchase Order Request*.
 - **Purchase Order** – This (**PO**) is a formal document and is an offer issued by a buyer to a supplier, indicating types, quantities, and agreed prices for products or services being acquired.

A **blanket purchase order** is set at a fixed priced contract for a period of time. The buyer looks for the best pricing among competing supplier bids. After the best one is chosen, the prices of goods are fixed, and also quantities of each product are given to the supplier to prepare stock for on requested delivery.

Ordering Information

This information is found in the **Ordering Information** group of the **Status – Order Information** tab. This section allows for order tracking information to be recorded.

The following illustrates the elements found in this section:

The screenshot shows a form titled "Ordering Information" with the following fields and labels:

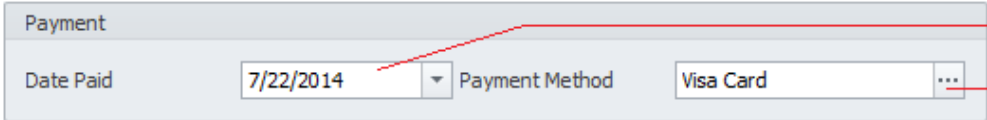
Field	Value	Label
Date Ordered	7/10/2014	Date Order Made
Date Promised	7/15/2014	Promised Delivery Date
Confirmation No	6786	Supplier's Confirmation No
Invoice Number	00023456	Supplier's Invoice No
Date Completed	7/15/2014	Date Order Completed

- **Order Date** – This is a date only field and is selectable from the attached calendar. Use this field to record the date the order was placed with the vendor.
- **Date Promised** – This is a date only field and is selectable from the attached calendar. Use this field to record the date the vendor promised to fulfill and deliver the order by.
- **Confirmation No** – This alpha/numeric field will accept up to 30 characters and is used to identify, record and trace a confirmed order.
- **Invoice Number** - This alpha/numeric field will accept up to 25 characters and is used record the supplier's invoice number.
- **Date Completed** - This is a date only field and is selectable from the attached calendar. Use this field to record the date the order was completed and all items have been received.

Payment Information

This section allows you to record payment information as it applies to the current purchase document. This information is found in the **Document Type** group of the **Status – Order Information** tab.

The following illustrates the elements found in this section:



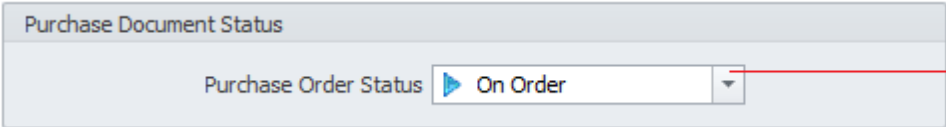
The screenshot shows a form titled "Payment". It contains two fields: "Date Paid" with a date picker set to "7/22/2014" and "Payment Method" with a dropdown menu set to "Visa Card". Red lines point from the labels "Date Invoice Paid" and "Method of Payment" to the respective fields.

- **Date Paid** – This is a date only field and is selectable from the attached calendar. Use this field to record the date the invoice for this purchase was made.
- **Payment Method** - This alpha/numeric field will accept up to 30 characters and is used to indicate the payment method that was used.

Purchase Document Status

Use this section to modify the status of the purchase document. This information is found in the **Purchase Document Status** group of the **Status – Order Information** tab.

The following illustrates the elements found in this section:



The screenshot shows a form titled "Purchase Document Status". It contains a dropdown menu labeled "Purchase Order Status" with the value "On Order" selected. A red line points from the label "Current Document's Status" to the dropdown menu.

- Change the document's status by clicking on an available indicator in the drop down list.
Available options are:
 - On Hold
 - Waiting Approval
 - On Order
 - Completed
 - Canceled

Approval

Use to this section to indicate document approvals. This information is found in the **Approval** group of the **Status – Order Information** tab.

The following illustrates the elements found in this section:

- **Approval 1 thru 3** – These three approval fields would be set by the persons making approvals. To set these approvals click on the **Select** button adjacent to these fields. From the invoked list, more to and select the record you want to use. Click the **Select** button.
- **Approved for Purchase** – Placing a checkmark here would indicate the document has been approved for purchase.

Attachments

You can attach as many external files as you would like to a record. These attachments can include images, mechanical drawings, PDF files, purchase agreements and more. For more information on this feature, please refer to the [Attachments](#) section of the [Common Features](#) chapter.

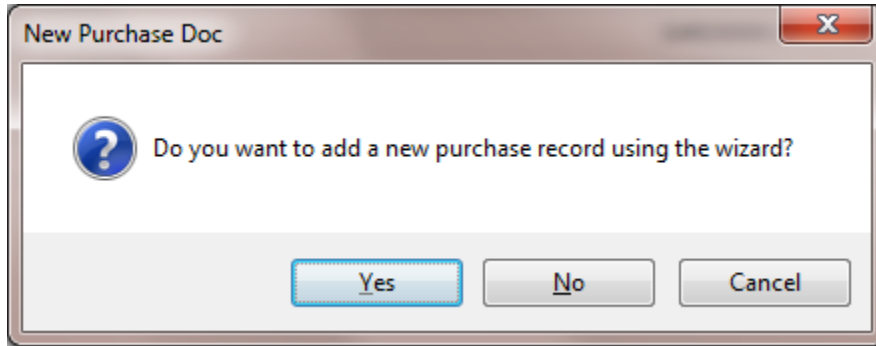
The following illustrates the elements found in this section:

To access the attachments:

- Move to the **Status – Order Information** tab of the inventory database, and locate the **Attachments** group.

Add New Purchase Document

To add a new purchase document:



- 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 **Purchasing Wizard** that steps you through the creation process. This wizard will be explained in a following section.
 - **No** – Creates a new document and returns you to the main screen where you can move through the various tabs editing and adding information as necessary.
 - **Cancel** – Backs out of the creation process.

Save Changes

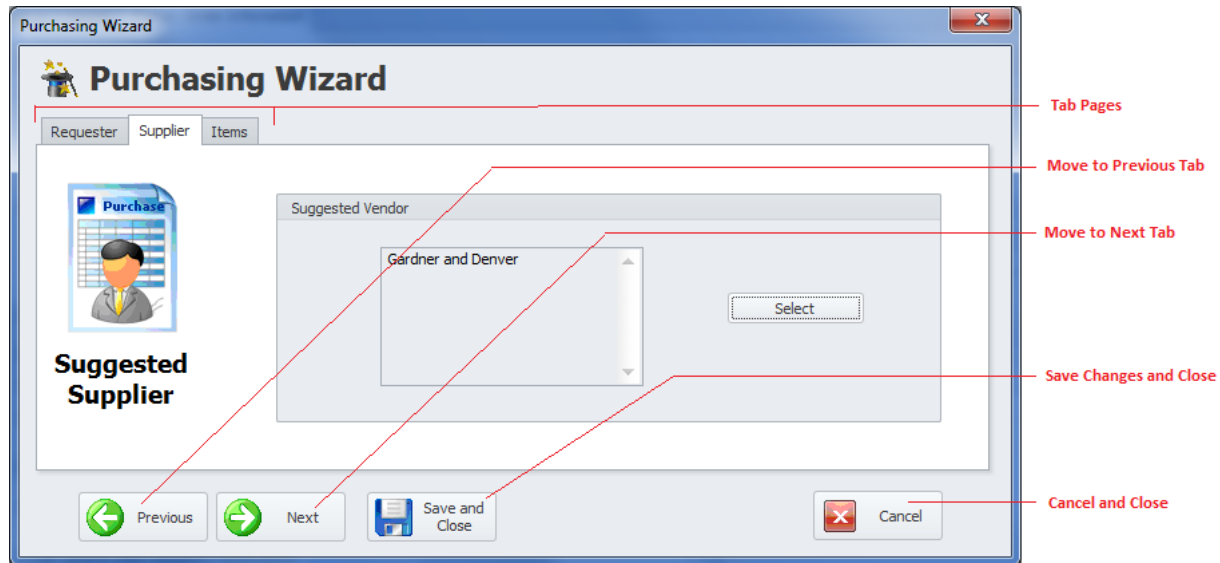
To save changes to the purchasing record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's **Quick Access** toolbar.

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

Purchasing Wizard

The **Purchasing Wizard** is designed to help in the process of creating purchasing documents by stepping you through the process.

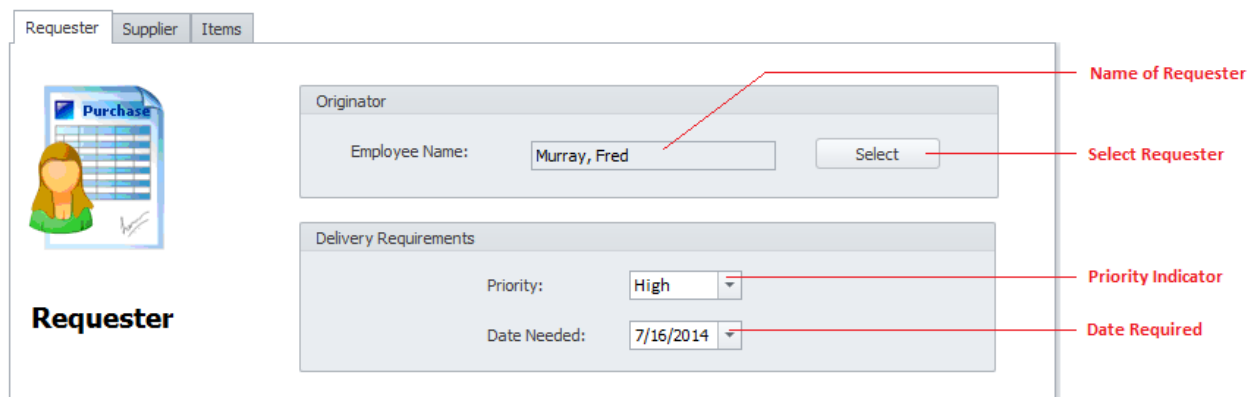
The following illustration shows the general or shared features of the Wizard:



- **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.

Requester Tab

The following illustration shows the elements on this tab:

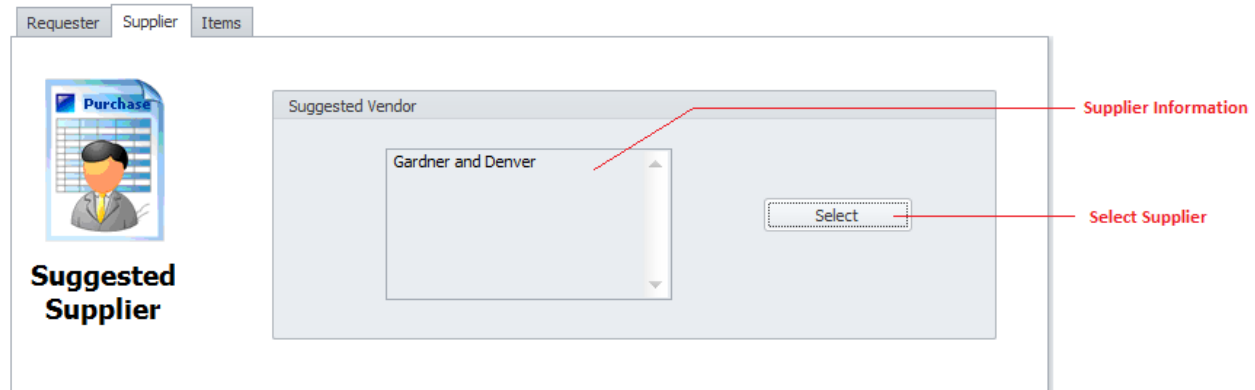


- **Originator** – This field would indicate the persons creating the purchase requisition. Set this value by clicking on the **Select** button. From the invoked Lookup dialog, move to the grid and select the record you want to assign. Click the **Select** button.
- **Priority** - You can assign your document a priority indicator. Options include: Urgent, High, Normal and Low. To assign a **Priority** to your document, click on the down arrow attached to this field and click on the value you want to assign from those listed.

- **Date Needed** - This is a date only field, and would indicate the date you require the purchase item by. Set this field by using the attached drop down calendar.

Supplier Tab

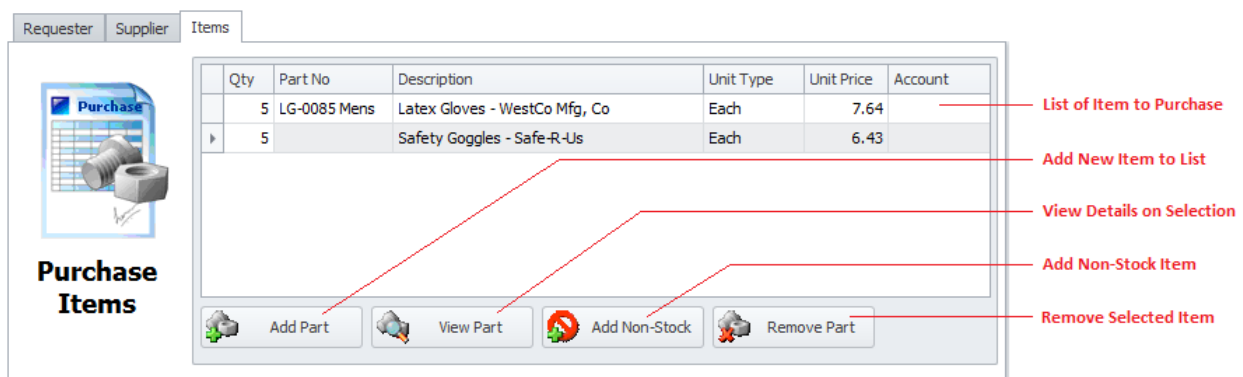
The following illustration shows the elements on this tab:



- **Suggested Vendor** - This field supplies information on the vendor being used to purchase items from. Only one supplier can be assigned to a single purchase document. To set this vendor, click on the **Select** button found in this area. From the invoked Lookup dialog, move to the grid and select the record you want to assign. Next click on the **Select** button.

Items Tab

This tab allows you to manage the items that will be purchased. The following illustration shows the elements on this tab:



To add Stocked Items to the Items List (Purchase Items)

- Click on the **Add Part** button.
- From the invoked **Parts and Inventory** Lookup, move to the grid and select the record you want to add. *Note: This module has its own Lookup, and allows you to include information about the item being added.*
- Move to the **Part to Be Added** section of the Lookup dialog, and complete this information.
 - **Part Description** – This is an alpha/numeric field with a size limitation of 75 characters.

- **Part Number** - This is an alpha/numeric field with a size limitation of 40 characters
- **Quantity** - Enter the amount that you wish to purchase. This field will only accept integer (whole numbers) values, and you can use the spin control to set this value.
- **Unit Cost** – This a floating point number field and should represent the item’s unit price. You can use the attached calculator to set this value.
- **Account** – This is an alpha/numeric field with a size limitation of 30 characters. You can either type directly into this field, or select a value from the attached drop down list.
- **Unit Type** – This is an alpha/numeric field with a size limitation of 30 characters. You can use the attached drop down list to help set this value

Part to be Added

Part Description: Part Number:

Quantity: Unit Cost: Account:

Unit Type:

- Click on the **Select** button.
- Move the record you just added, and double click in columns of the grid, and edit these values.

To add a Non-Stock Item to the Materials List

- Move to the **Items** tab, and locate the **Materials List** group.
- Click on the **Add Non-Stock** button.

Add Non-Stock Item

Enter the Item description in the space provided and then click OK.

- From the invoked **Add Non-Stock Item** dialog, move to the text box provided and enter a description for this item. Description fields can contain up to 75 alpha/numeric characters.
- Click on the **OK** button.
- Move to the various columns in the grid showing the item you just added. Double clicking within these columns will invoke its editor. Edit the values with the information you want to assign.
 - **Qty** - Enter the amount that you wish to purchase. This field will only accept integer (whole numbers) values.
 - **Part No** – This is an alpha/numeric field with a size limitation of 40 characters.
 - **Description** – This is an alpha/numeric field with a size limitation of 75 characters.
 - **Unit Type** – This is an alpha/numeric field with a size limitation of 30 characters.

- **Unit Price** – This a floating point number field and should represent the item’s unit price.
- **Account** – This is an alpha/numeric field with a size limitation of 30 characters. You can either type directly into this field, or select a value from the attached drop down list.

For the other options available on this tab, please refer to the [Materials List](#) section of this chapter.

Wizard – Save and Close

Whenever you either make changes to a document, or create a new one with this Wizard, ensure to save your changes.

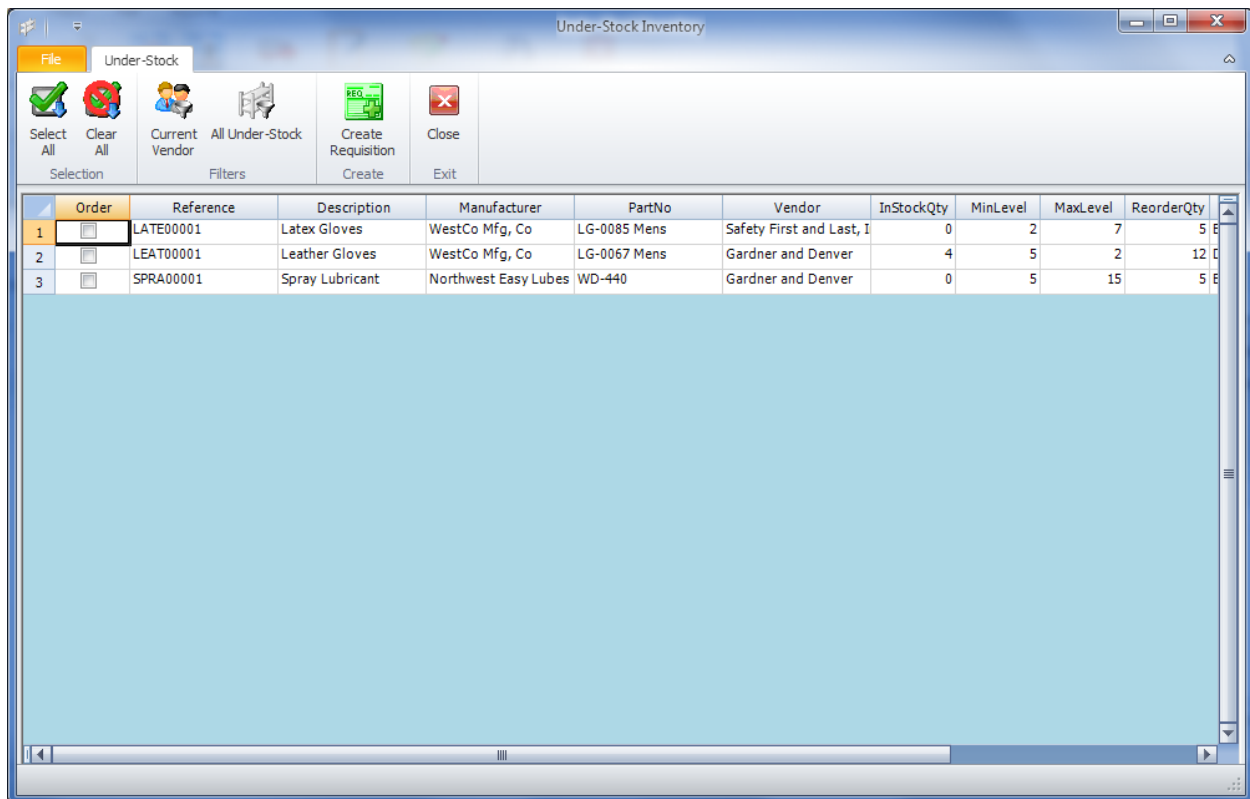
- Click on the **Save and Close** button to save and apply your changes.

Understock Items

The *Understock Inventory Items* routine searches the database and returns a screen full of items where the stock levels have fallen below recommended inventory levels. You can then have the application create purchase requisitions for you automatically from these items.

IMPORTANT NOTE: *If items have been set as ‘On Order’, they will be hidden by these routines.*

This screen has its own ribbon control as shown in the following illustration:



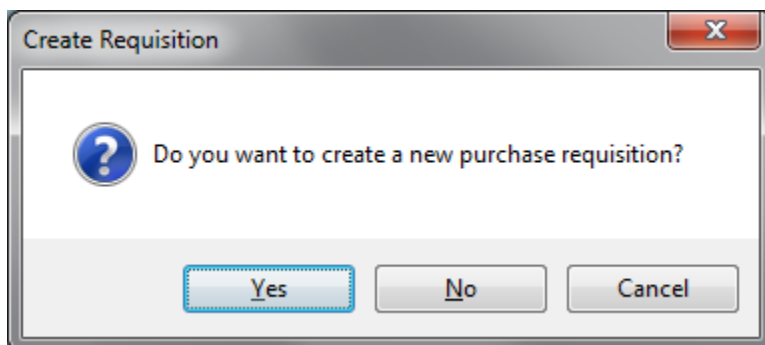
The following are the elements on the ribbon control tab, reading left to right:

- **Select All** – Clicking this button will select (check) every record in the current listing.
- **Clear All** – Clicking this button will clear or uncheck all selections.
- **Current Vendor Filter** – This will filter the listing by the vendor that is assigned to the currently selected record.
- **All Understock Filter** – Clicking this option will filter the listing by all inventory records that have fallen under recommend inventory levels.
- **Create Requisition** – Clicking this option will create a purchase requisition document based on all Selected (checked) records.

Creating a Purchase Requisition for a Single Vendor

The following example will outline the steps required to create a purchase requisition for all understock items belonging to a single vendor:

- Click on the **Understock Item** option as found on the **Home** tab of the ribbon.
- From the invoked **Understock Inventory** dialog screen, move to the grid found here and click on a record that contains the Vendor you want to create the requisition for.
- Move to the **Filters** group in the ribbon, and click on the **Current Vendor** option. This should filter the listing by the selected vendor.
- Move to the **Order** column in the grid, and click or check each item you want to order. To order all items simply click on the **Select All** option in the ribbon.
- Move to and click on the **Create Requisition** button in the ribbon.



- When prompted about creating a new purchase requisition. Click on the **Yes** button.
- A message should be displayed indicating the new requisition was created.

Aging PO

To view or re-filter the database to show aging purchase documents:

- Move to the **Home** tab in the ribbon.
- Move to the **Quick Options** group and click on the **Aging POs** to expand the sub-menu.

- Select one of the available options
 - **Over 30 days**
 - **Over 60 days**
 - **Over 90 days**
 - **View All Over Due.**

Blanket POs (Purchase Orders)

Blanket Purchase Orders are purchase agreements that you have setup with vendors for the items that they supply. These orders are normally approved for certain dollar amounts and for certain lengths of time. Once the blanket purchase order is created, you issue child purchase orders against the original amount. The *Blanket Purchase Orders* routine allows you to create a master blanket order and then create or issue child documents that are attached or associated to this master record. As child documents are added, a running balance will be calculated for you so you will know exactly where you stand.

To access the Blanket PO routines:

- Move to the **Home** tab in the ribbon.
- Move to the **Quick Options** group and click on the **Blanket POs** option.

Adding a New Parent Blanket Purchase Order

- From the **Blanket PO** dialog screen, move to the **Blanket POs** tab.
- Move to the data control located near the bottom of this tab and click on the **Append (+)** button. A new record will be created.

Blanket Purchase Orders

Blanket POs | Child Documents

Drag a column header here to group by that column

PO Num	Date Open	Amount	Balance
1102-00000006	2/24/2011	200	62.73

Document Information

PO Number: 1102-00000006

Date Opened: 2/24/2011

Date Closed:

Supplier: Gardner and Denver

Amount Approved: 200

Balance: 62.73

Status: Open

- Move to the **Document Information** section, and edit the information of the various fields found there.
 - **PO Number** – This alpha/numeric field can contain up to 25 character and is automatically generated for you by the application. You can check to see if this is unique in the system by clicking on the **Check** button adjacent to this field.
 - **Date Opened** – This is a date only field and can be set by using the attached drop down calendar. This is beginning date of the blanket PO document.
 - **Date Closed** – This is a date only field and can be set by using the attached drop down calendar. This is ending date of the blanket PO document.
 - **Supplier** – This is the vendor assignment for this document. Set this field by clicking on the **Select** button. Then select the record you want to assign from within the grid, and then click on the **Select** button.
 - **Amount Approved** – This is total amount of the document agreed on. This floating point number field can be set using the attached calculator.
 - **Balance** – This field can be calculated for you and would represent the remaining balance of the agreement. When calculated, it takes the totals from all child POs, and subtracts this amount from the **Amount Approved**. The result of this calculation is applied to the **Balance** field.
 - **Recalculate** - Clicking this button will execute the above described calculation.
 - **Status** – Selectable from the drop down list, this value indicates the status of the document.
 - **Post (Save Changes)** – Ensure you click on the **Post** (checkmark) button in the data control to save your changes.

Blanket PO Child Documents

Child documents are actual purchase orders that have been assigned to a Parent Blanket Purchase Order.

The following illustrates the **Child Documents** tab of the **Blanket POs** dialog screen:

The screenshot shows a software window titled "Blanket POs". It has two tabs: "Blanket POs" (selected) and "Child Documents". The main area contains a table with the following data:

Status	Date Ordered	PO Num	Cost Total
▼			
▶	12/22/2010	000003	137.27

Below the table is a "Document Information" panel with the following fields:

- PO Number: 000003
- Date Created: 1/4/2011
- Date Ordered: 12/22/2010
- Date Completed: (empty)
- Total Amount: 137.27
- Status: On-Hold

At the bottom of the window are four buttons: "Add New", "Add Existing", "Open Existing", and "Remove PO". A "Close" button is also present in the bottom right corner.

To add a new Purchase Order and have it assigned to a Blanket PO

- From the **Blanket PO** dialog screen, move to the **Blanket POs** tab and select the parent record you want to add a child record to.
- Move to the **Child Documents** tab.
- Click on the **Add New** button. This action invokes the **Purchasing Wizard**. Please follow the instruction on using the **Purchasing Wizard** as outlined earlier in this chapter.

To add an Existing Purchase Order to a Blanket PO

- From the **Blanket PO** dialog screen, move to the **Blanket POs** tab and select the parent record you want to add a child record to.
- Move to the **Child Documents** tab.
- Click on the **Add Existing** button.
- From the invoked **Purchasing Lookup**, move to the grid and select the document you want to assign.
- Click on the **Select** button.

To Open an Existing PO that's attached to a Blanket PO

- From the **Blanket PO** dialog screen, move to the **Blanket POs** tab and select the parent record that the child PO belongs to.
- Move to the **Child Documents** tab.
- Click on the **Open Existing** button.

To Remove a Child PO assigned to a Blanket PO

- From the **Blanket PO** dialog screen, move to the **Blanket POs** tab and select the parent record that the child PO belongs to.
- Move to the **Child Documents** tab.
- Click on the **Remove PO** button.
- When prompted about the removal, click the **Yes** button.

The above action does not delete the Child Purchase Order, it only remove the parent-child assignment.

Document Notes

You can keep detailed notes on each purchasing document. 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:

- Select and make active the document that contains the notes you want to view or edit.
- Move to the **Home** tab in the ribbon and click in the **Document Notes** option.

Receiving Wizard

Once an order has been placed, you will eventually start receiving the items that were ordered. The **Receiving Wizard** helps with this process. It not only updates receiving information for the current purchase document, but also adds items to inventory.

The following illustrate the elements of this wizard:

The screenshot shows the 'Receiving Wizard' dialog box. At the top, a text box contains 'LG-0067 Mens - Leather Gloves - WestCo Mfg, Co'. Below this is the 'Receiving Information' section with three input fields: 'Quantity Ordered' (12), 'Quantity Previously Received' (0), and 'Enter Quantity Receiving' (0). A checkbox labeled 'Update Unit Cost Information' is checked. Below that is the 'Unit Cost Information' section with three input fields: 'Parts Database Unit Cost' (8.76), 'Unit Cost shown on PO' (8.76), and 'Enter New Unit Cost' (8.76). There is also an unchecked checkbox labeled 'Average the Parts Database Cost with the New Unit Cost shown above.' At the bottom are 'Accept' and 'Cancel' buttons. Red lines connect text labels on the right to specific fields in the dialog.

Annotations:

- Description of item being Received
- Quantity Shown on PO
- Quantity Previously Received
- Allows Updating Unit Cost Information
- Old Unit Cost
- Unit Cost on PO
- New Unit Cost
- Allows Averaging Costs
- Accept Changes

- **Item Description** – This is the top most, framed area of the dialog. This information outlines the item that is being received.
- **Receiving Information** – This area allows you to view and edit items that are being received.
 - **Quantity Ordered** – This comes from the purchase document, and indicates the quantity of the selected item that was ordered.
 - **Quantity Previously Received** – This tells you how many of the current item that was already received.
 - **Enter Quantity Receiving** – This a numeric only field. Enter the number of items you are currently receiving.
- **Update Unit Cost Information** – Checking this checkbox both tells the program it can update the inventory database with new unit costs information, and allows you to record this information.
- **Unit Cost Information** – This section allows you to view and edit unit cost information as it applies to the item being received.
 - **Parts Database Unit Cost** – This indicates the unit cost associated with the current item, and as currently set in the inventory database.

- **Unit Cost shown on PO** – This indicates the unit cost associated with current item, and the price being charged on the current document.
- **Enter New Unit Cost** – If the average option is not set, this is the new unit price that will be applied to the inventory database.
- **Average the Parts Database Cost with the New Unit Cost shown above** - When checked, the program adds the Unit Price in the database to the New Unit Price here. It divides these two value by 2, and places the result in **Unit Price** field of the inventory database.
- **Accept** – Clicking this button performs the following:
 - Updates the **purchase document** with the items received. If all items ordered have been received, it will prompt you to change the document's status to **Completed**.
 - Updates inventory levels of the **Inventory database** with the quantities received.
 - When allowed, updates the **Inventory database** with new unit costs information.
 - Creates a new entry in the **Parts Movement** database.
 - Creates a new entry in the **Purchasing Costs** database.
 - If receiving multiple items, moves you to the next item.

Receiving All Items

This option allows you to receive all items ordered as it relates to the selected purchase document. To receive all items:

- Select and make active the document that contains the items you want to receive.
- Move to the **Home** tab in the ribbon.
- Click on the **Receive Items** button to expand the drop down.
- Click on the **Receive All Items** option.
- Follow the instructions as outline in the [Receiving Wizard](#) section of this chapter.

Receive Selected Item

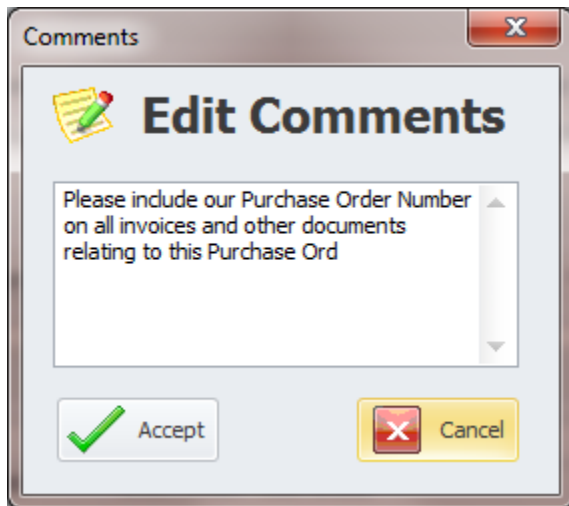
This option allows you to receive a single item that was ordered, and as it relates to the selected purchase document. To receive a single item:

- Select and make active the document that contains the item you want to receive.
- Move to the **Details** tab, and locate the **Materials List** group.
- Select the item you want to receive from those found in the grid.
- Move to the **Home** tab in the ribbon.
- Click on the **Receive Items** button to expand the drop down.
- Click on the **Receive Selected Item** option.
- Follow the instructions as outline in the [Receiving Wizard](#) section of this chapter.

Document Comments

You can specify the default comments to use on your purchasing documents from the **Purchasing Setup** routines. If wanted, you also have the ability to specify comments on an individual document bases.

To specify the comments to use for the current document:



- Select and make current the document you want to customize the comments on.
- Move to the **Home** tab in the ribbon.
- Click on the **Document Comments** button to expand the drop down. Click on one of the following options.
 - **Purchase Order Comments**
 - **Requisition Comments**
- From the invoked **Edit Comments** dialog, move to the text editor area add or edit your comments there.
- Click on the **Accept** button.

Search

To perform a search on the **Purchasing and Receiving** 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.

Purchasing Budgets

The **Purchasing and Receiving** module supports creating and maintain budgets as they related to purchasing operations. **Budget** can be based on either **Accounts** or **Cost Centers**.

To access the **Purchasing Budgets**:

- From the **Purchasing and Receiving** module, move to the **Go** tab in the ribbon and click on the **Purchasing Budgets** option.

Please refer to the [Budgets](#) section of the [Common Features](#) chapter on how to use this feature.

Purchasing Documents

The **Purchasing and Receiving** module supports its own **Documents database**. These documents can be attachments or links, use the built in Rich Text Editor or store pictures and images.

To access the **Purchasing Documents**:

- From the **Purchasing and Receiving** module, move to the **Go** tab in the ribbon and click on the **Purchasing Documents** option.

Please refer to the [Documents Database](#) section of the [Common Features](#) chapter on how to use this feature.

Fax Cover Sheet

You can create a **Fax Cover Sheet** with the **Purchasing and Receiving** module.

The screenshot shows a 'Fax Cover Sheet' window with the following fields and controls:

- To:** John Denver
- Organization:** Gardner and Denver
- Fax Number:** 906-909-9090
- Regarding:** Purchase document enclosed
- Comments:** (Empty text area)
- From:** Rick Smith
- Date:** 7/19/2014
- # of Pages:** 1
- Print** button
- Preview** button
- Cancel** button

Annotations on the right side of the window:

- Vendor Information** (points to the 'To' field)
- Select Vendor** (points to the 'Select' button next to the 'To' field)
- Person Sending Fax** (points to the 'From' field)
- Fax Date** (points to the 'Date' field)
- Number of Pages being sent** (points to the '# of Pages' field)
- Fax Regarding Information** (points to the 'Regarding' field)
- Add or Edit Comments** (points to the 'Comments' field)
- Print the document** (points to the 'Print' button)
- Preview the document** (points to the 'Preview' button)

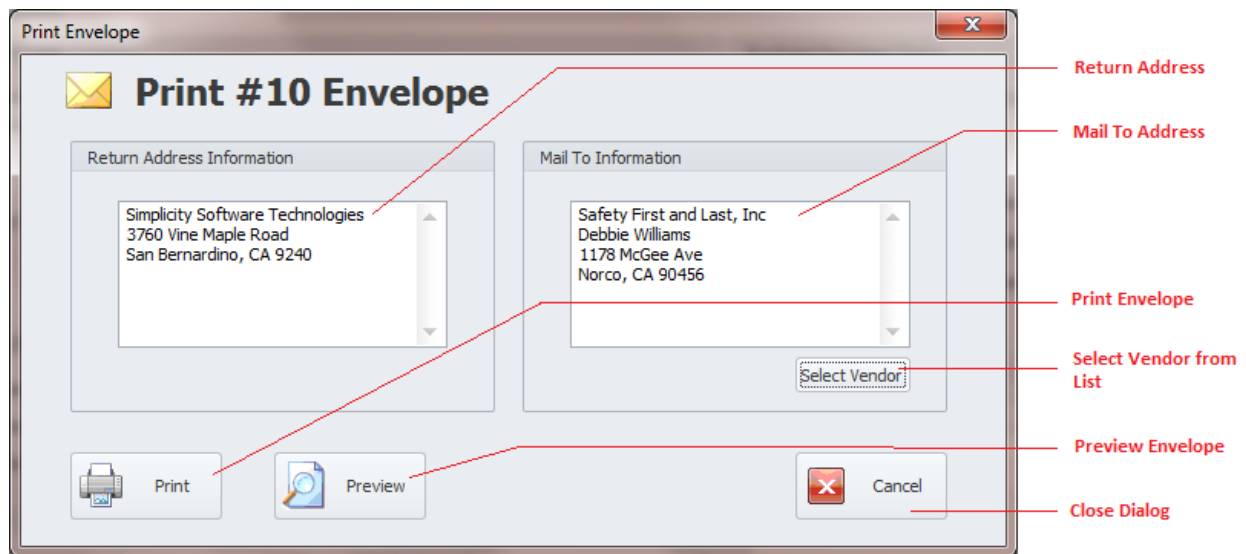
To create a Facsimile (Fax) Cover Sheet:

- From the **Purchasing and Receiving** module, move to the **Go** tab in the ribbon and click on the **Fax Cover Sheet** option.
- Move through the various field of this dialog and enter appropriate information for those fields.
- Click on either the **Print** or **Print Preview** buttons.
- Click **Cancel** when done.

The fields of this dialog are not connected to any database, so there is not size limitations applied to these alpha/numeric fields.

Print No. 10 Envelope

You can create and **Print a No. 10 Envelope** with the **Purchasing and Receiving** module.



To Print a #10 Envelope:

- From the **Purchasing and Receiving** module, move to the **Go** tab in the ribbon and click on the **Print Mailing Envelope** option.
- Move the **Return Address Information** text box and edit this information.
- Move the **Mail To Information** text box and edit this information.
- To select and insert a vendor, move to and click in the **Select Vendor** button.
- Move to the grid and select the record you want to insert, then click on the **Select** button.
- Click on either the **Print** or **Print Preview** buttons.
- Click **Cancel** when done.

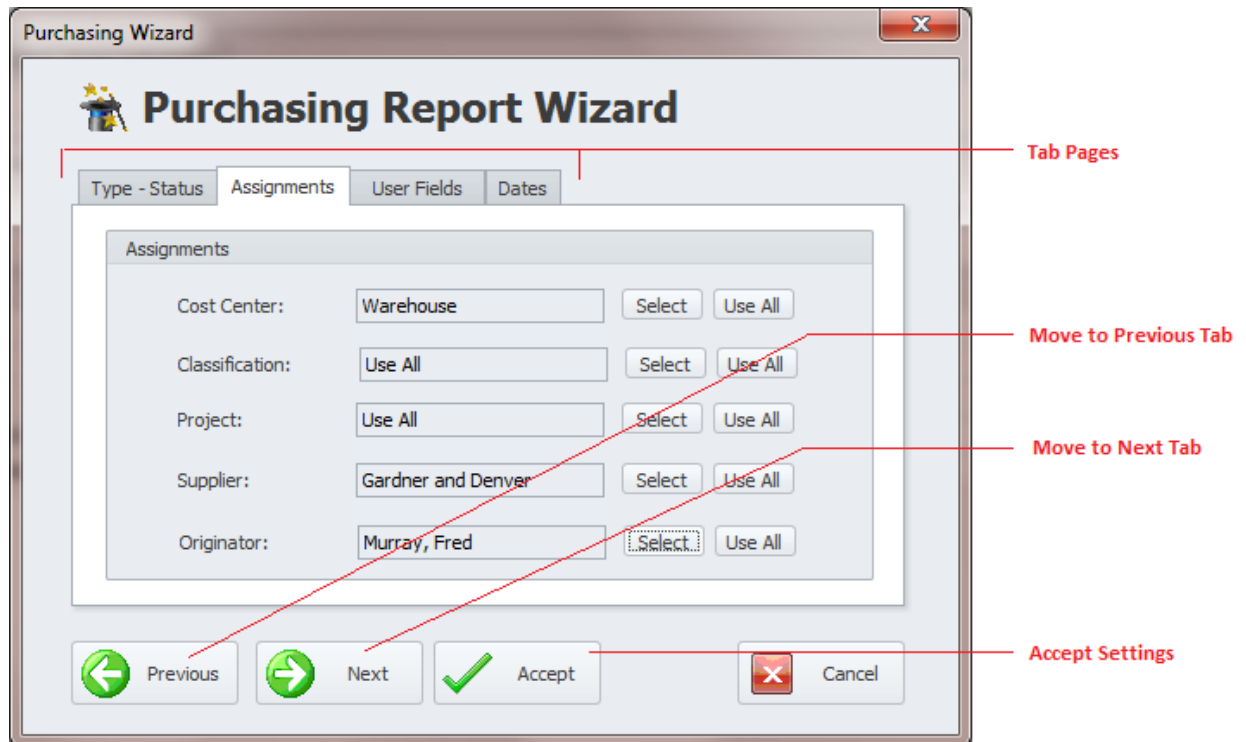
The fields of this dialog are not connected to any database, so there is not size limitations applied to these alpha/numeric fields.

Main Report – Filter Wizard

This Wizard is used with **Filter Wizard**, **Purchasing and Receiving Report** and **Main Report Wizard**.

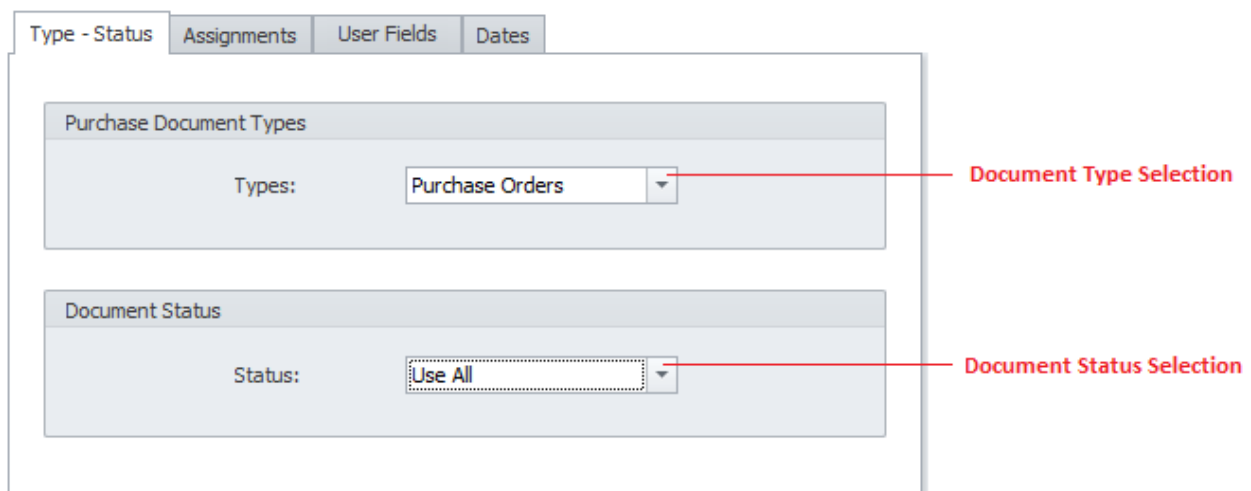
When used for either filtering or reporting purposes, the resulting items will be returned by the choices or criteria as setup with this wizard.

The following illustrates the elements of the **Main Wizard** dialog screen:



Types – Status Tab

The following illustrates the elements found on this tab:



- **Purchase Document Types** – Selectable from the drop down list, this specifies the type of purchase documents to report/filter on.
- **Document Status** - Selectable from the drop down list, this specifies the type of status indicator of the documents to report/filter on.

Assignments Tab

The following illustrates the elements found on this tab:

The screenshot shows the 'Assignments' tab with the following fields and buttons:

Field	Value	Select	Use All
Cost Center:	Warehouse	Select	Use All
Classification:	Use All	Select	Use All
Project:	Use All	Select	Use All
Supplier:	Gardner and Denver	Select	Use All
Originator:	Murray, Fred	Select	Use All

Red annotations indicate that clicking the 'Select' button allows users to 'Select Assignments from Lists', while clicking the 'Use All' button results in 'Ignore Assignments'.

You can set the values of these fields:

- Click on the **Select** button adjacent to the field you want to assign.
- From the invoked Lookup select the assignment you want to use from those listed and click on the **Select** button.
- Clicking the **Use All** button adjacent to these fields ignore these assignments.

User Fields Tab

The following illustrates the elements found on this tab:

The screenshot shows the 'User Fields' tab with the following fields and buttons:

User Field	Value	Select	Use All
User Field 1	Use All	Select	Use All
User Field 2	Use All	Select	Use All
User Field 3	Use All	Select	Use All
User Field 4	Use All	Select	Use All

Red annotations indicate that clicking the 'Select' button allows users to 'Select Assignments from Lists', while clicking the second 'Use All' button results in 'Ignore Assignments'.

You can set the values of these fields:

- Click on the **Select** button adjacent to the field you want to assign.
- From the invoked Lookup select the assignment you want to use from those listed and click on the **Select** button.
- Clicking the **Use All** button adjacent to these fields ignore these assignments.

Dates Tab

The following illustrates the elements found on this tab:

The screenshot displays the 'Dates' tab within a software interface. It features a 'Date Range' section with 'Start Date' and 'End Date' dropdowns, both set to '7/22/2014'. Below these is a 'Date Type' dropdown set to 'Creation Date' and a 'Use All Dates' checkbox. A 'Group By' section at the bottom contains a 'No Sort' dropdown. Red lines and labels identify key elements: 'Date Range Selection' points to the date range section, 'Date Type to use' points to the 'Date Type' dropdown, 'Ignore Date' points to the 'Use All Dates' checkbox, and 'Sort/Group By' points to the 'Group By' dropdown.

- **Date Range Selection** – Returns records 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.
 - **Date Type** – When available, allows you to specify the date type to use. Options include **Creation Date**, **Order Date** and **Closed Date**.
 - **Use All Dates** – Ignores dates and returns all.
- **Group By** – This criteria specifies how you want presented information group, or in the case of filtering, sorted by.

Accept

When done setting everything up, move to and click on the **Accept** button.

Items Report Wizard

This Wizard is used with the **Receiving Report** and **Purchase Items Report**. When used for reporting purposes, the resulting items will be returned by the choices or criteria as setup with this wizard.

The following illustrates the elements of the **Items Report Wizard** dialog screen:

The screenshot shows a 'Purchased Items Report' dialog box. It has a title bar with a close button (X). The main area is divided into three sections: 'Date Ranges', 'Account', and 'Group By'. The 'Date Ranges' section has 'Start Date' and 'End Date' dropdowns both set to '7/22/2014', and an 'Include All Dates' checkbox. The 'Account' section has a text box with 'General Use', a 'Select' button, and a 'Use All' button. The 'Group By' section has a dropdown menu set to 'Months'. At the bottom are 'Accept' and 'Cancel' buttons. Red lines with labels point to various elements: 'Date Range Selection' points to the date dropdowns; 'Ignore Dates' points to the 'Include All Dates' checkbox; 'Select an Account' points to the 'Select' button; 'Ignore Accounts' points to the 'Use All' button; 'Group By Selection' points to the 'Months' dropdown; and 'Accept Criteria' points to the 'Accept' button.

- **Date Range Selection** – Returns records that fall within the provided date range.
 - **Start Date** – This is the starting date of the provided date range.
 - **End Date** – This is the ending date of the provided date range.
 - **Use All Dates** – Ignores dates and returns all.
- **Account** – This field allows you specify the account to report on as it applies to individual purchase items. To set this:
 - Click on the **Select** button adjacent to this field.
 - From the invoked Lookup select the assignment you want to use from those listed and click on the **Select** button.
 - Clicking the **Use All** button adjacent to this field will ignore this assignment.
- **Group By** – This criteria specifies how you want reported information grouped.
- **Accept** - When done setting everything up, move to and click on the **Accept** button.

Filtering Options

On the **Filtering** tab of the ribbon control, you'll find the following filtering options:

- **Default Filter** – Applies the default filter the purchasing documents (All Open).
- **Filter Wizard** – 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.
- **Open Purchase Orders** – Filters the database by all open purchase orders.
- **Filter by Open Requisitions** – Filters the database by all open purchase requisitions.

- **View All** – Removes all filters allowing you to view every document in the database.

Email Composer

The **Purchasing and Receiving** module supports the creation and sending of email messages.

To access the **Email Composer**:

- Move to the ribbon control and click on the **Mail** tab.
- Click on the **Mail Composer** option.

Please refer to the [Email Composer](#) section of the [Common Features](#) chapter on how to use this feature.

Mail Quotation Request

This option opens the **Email Composer** with the current document attached in the form of a **Quotation Request**.

To access this option:

- Move to the ribbon control and click on the **Mail** tab.
- Click on the **Mail Quotation Request** option.

Please refer to the [Email Composer](#) section of the [Common Features](#) chapter on how to use this feature.

Mail Purchase Requisition

This option opens the **Email Composer** with the current document attached in the form of a **Purchase Requisition**.

To access this option:

- Move to the ribbon control and click on the **Mail** tab.
- Click on the **Mail Purchase Requisition** option.

Please refer to the [Email Composer](#) section of the [Common Features](#) chapter on how to use this feature.

Mail Purchase Order

This option opens the **Email Composer** with the current document attached in the form of a **Purchase Order**.

To access this option:

- Move to the ribbon control and click on the **Mail** tab.
- Click on the **Mail Purchase Order** option.

Please refer to the [Email Composer](#) section of the [Common Features](#) chapter on how to use this feature.

E-Mail Approval Routing of Purchase Documents

Most organizations today need various individuals to approve a Purchase document prior to allowing the actual purchase. An example of such an approval system is as follows:

- A purchase document is created and the program automatically e-mails a notice to the default e-mail recipient (normally the buyer).
- The second person (buyer) reviews the document, and then manually e-mails a notice to a person they have specified on their computer (they press an e-mail button and the rest is automatic). This third person maybe a department manager.
- The third person reviews the document and then clicks a button to manually e-mail a notice to a person they have specified on their computer. For this example, let's say this e-mail goes to the Plant Manager.
- This fourth person reviews the document and then clicks a button to e-mail a notice to a person they have specified on their computer (the Plant Manager has the buyer as their default). Thus the approval procedure is completed, semi-automatic and completely paperless.

Send Approval Email

To send an **Approval Email**:

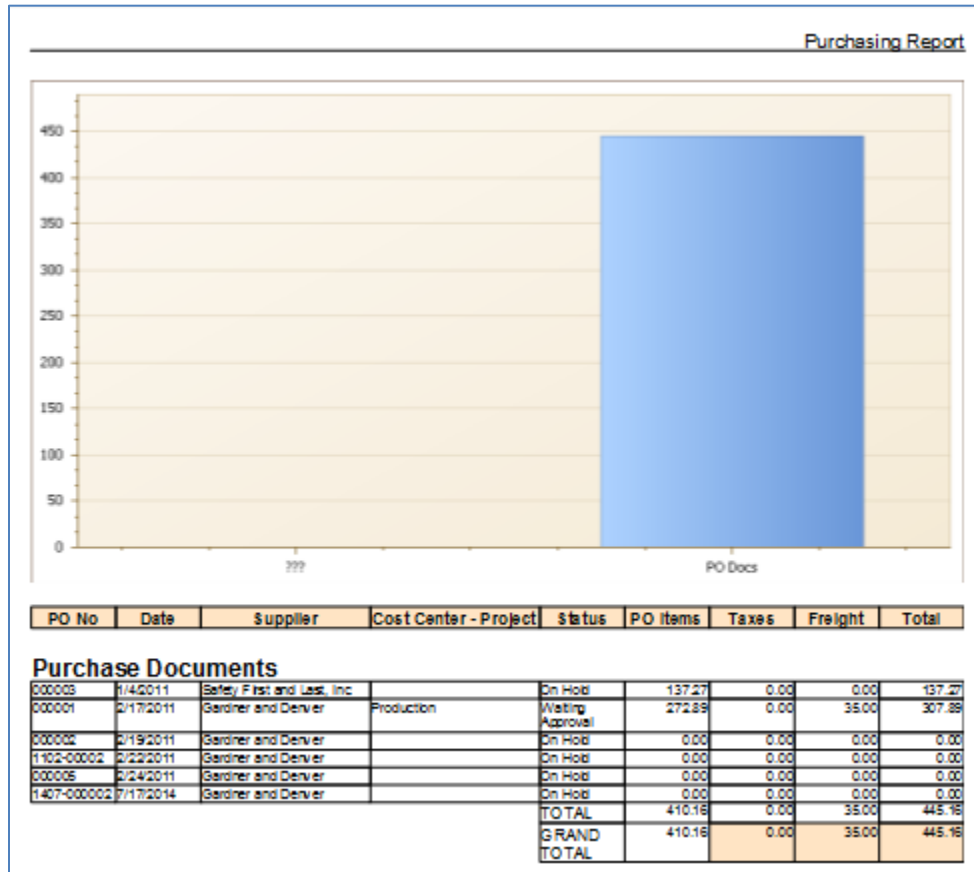
- Ensure that the email is setup for this feature. This is the **Approval Mail Recipient** setting on the **Email** tab of the **Purchase Setup** dialog.
- Move to the ribbon control and click on the **Mail** tab.
- Click on the **Send Approval Email** option

***IMPORTANT:** Also ensure your email settings have been setup in the Main Program Settings section.*

Main Report Wizard

This report uses the [Main Report – Filter Wizard](#) as explained earlier in this chapter, and returns information in both chart and data form.

The following illustrates this report in its most basic form:



To create this report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Main Report Wizard** option.
- Follow the instructions as outlined in the [Main Report – Filter Wizard](#) section.

Back Orders Report

Also known as an Aging Items Report, this report returns items that are on backorder.

Back Orders Report							
PO No	Date Ordered	Supplier	Cost Center	Date Promised	Date Required	Status	Cost
GARD00001							
000001	2/18/2011	Gardner and Denver	Production			Waiting Approval	307.89
SAFE00001							
000003	12/22/2010	Safety First and Last, Inc			2/28/2011	On Hold	137.27

To create this report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Backorders Report** option to expand the drop down, and then click one of the following options:
 - **Aging From Today**
 - **Over 30 Days**
 - **Over 60 Days**
 - **Over 90 Days**

Receiving Report

The **Received Items Report** will report on all items received within a given time period. This report makes use of the **Items Report Wizard** to assist in the report creation. Please refer to the [Items Report Wizard](#) for more information.

The following illustrates a basic receiving report:

Received Items Report						
PO No	Date	Qty	Part No	Description	Unit Cost	Extended
Received Items						
1102-00002	7/22/2014	5.00	LG-0085 Mens	Latex Gloves	7.64	38.20
1102-00002	7/22/2014	7.00	LG-0067 Mens	Leather Gloves	8.76	61.32
1102-00002	7/22/2014	5.00		Safety Goggles - Safe-R-U's	6.43	32.15
1102-00002	7/22/2014	5.00	WD-440	Spray Lubricant - Northwest Easy Lubes	9.78	48.90
TOTAL						180.57
GRAND TOTAL						180.57

To create this report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Receiving Report** option.
- Follow the instructions as outlined in the [Items Report Wizard](#) section.

Purchased Items Report

The **Purchased Items Report** will report on all items purchased within a given time period. This report makes use of the **Items Report Wizard** to assist in the report creation. Please refer to the [Items Report Wizard](#) for more information.

The following illustrates a basic report:

Purchased Items Report						
PO No	Date	Qty	Part No	Description	Unit Cost	Extended
Purchase Items						
000001	2/18/2011	1.00	800T-77990	Drum Switch - Allen-Brady	167.77	167.77
	2/19/2011	1.00	800T-77990	Drum Switch - Allen-Brady	167.77	167.77
	2/19/2011	12.00	LG-0067 Mens	Leather Gloves - WestCo Mfg. Co	8.76	105.12
000003	2/19/2011	12.00	LG-0067 Mens	Leather Gloves - WestCo Mfg. Co	8.76	105.12
000003	2/19/2011	5.00		Safety Goggles - Safe-R-U's	6.43	32.15
	2/19/2011	5.00		Safety Goggles - Safe-R-U's	6.43	32.15
	2/19/2011	5.00		Safety Goggles - Safe-R-U's	6.43	32.15

To create this report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Purchased Items Report** option.
- Follow the instructions as outlined in the [Items Report Wizard](#) section.

Purchasing and Receiving Report

This report use the [Main Report – Filter Wizard](#) as explained earlier in this chapter, and returns information on purchasing and receiving activities.

The following illustrates this report in its most basic form:

Purchasing-Receiving Report									
PO No	Date	Supplier	Received	Invoice #	Classification	Total Items	Taxes	Freight	PO Total
Purchase-Received Items									
1102-00002		Gardner and Denver				0.00	0.00	0.00	0.00
000001	2/18/2011	Gardner and Denver		667223		272.89	0.00	35.00	307.89
SUB-TOTALS						272.89	0.00	35.00	307.89
GRAND TOTALS						272.89	0.00	35.00	307.89

To create this report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Purchasing and Receiving** option.
- Follow the instructions as outlined in the [Main Report – Filter Wizard](#) section.

Vendor Report

This report uses its own creation wizard and reports on purchases made to a single vendor.

The following illustrates the elements of the report wizard:

The screenshot shows the 'Vendor Report' dialog box. It has two main sections: 'Date Ranges' and 'Vendor Selection'. In the 'Date Ranges' section, there are dropdown menus for 'Start Date' and 'End Date', both set to '7/22/2014'. Below them is a checkbox labeled 'Include All Dates'. In the 'Vendor Selection' section, there is a text box containing 'Gardner and Denver' and a 'Select' button. At the bottom, there are two buttons: 'Accept' (with a green checkmark icon) and 'Cancel' (with a red X icon). Red lines with labels point to specific elements: 'Date Range Selection' points to the date dropdowns, 'Ignore Dates' points to the 'Include All Dates' checkbox, 'Assign Vendor' points to the 'Select' button, and 'Create Report' points to the 'Accept' button.

To create this report:

- Move to and click on the **Reports** tab in the ribbon.
- Click on the **Vendor Report** option.

Vendor Report: Gardner and Denver								
PO No	Date	Supplier	Order Date	Date Required	Completed	Invoice No	Status	Cost
February - 2011								
000001	2/17/2011	Gardner and Denver	2/18/2011			667223	Waiting Approval	307.89
SUB-TOTAL								307.89
Unassigned Order Date								
000002	2/19/2011	Gardner and Denver		2/28/2011			On Hold	0.00
1102-00002	2/22/2011	Gardner and Denver					On Hold	0.00
000005	2/24/2011	Gardner and Denver					On Hold	0.00
SUB-TOTAL								0.00
GRAND-TOTAL								307.89

- **Date Range Selection** – Returns records that fall within the provided date range.
 - **Start Date** – This is the starting date of the provided date range.
 - **End Date** – This is the ending date of the provided date range.
 - **Use All Dates** – Ignores dates and returns all.
- **Vendor** – This field allows you specify the vendor to report on as it applies to purchase documents. To set this:
 - Click on the **Select** button adjacent to this field.
 - From the invoked Lookup select the assignment you want to use from those listed and click on the **Select** button.
- When done setting everything up, move to and click on the **Accept** button.

Document Print Options

To print the current document:

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

Other Print Options

To create a print preview of the current document, and in the document type of your choice:

- Locate and select the document you want to print.
- Open the **File** menu and expand the **Other Print Options** menu by clicking on it.
- Click on the document type of your choice that you want to see a preview of:
 - **Print Request for Quotation** – Creates a print preview of a RFQ document.
 - **Print Purchase Requisition** – Creates a print preview of a REQ document.
 - **Print Purchase Order** – Creates a print preview of a PO document.

Export Options

You can export the selected purchase document to one of the following formats: pdf, xlsx, xls, rtf, docx, htm, emf, tiff, png, jpg, gif, bmp and xps.

To export the current document:

- Locate and select the document you want to export.
- Open the **File** menu and expand the **Export Options** menu by clicking on it.
- Click on the document type of your choice that you want to export to:
 - **Export Current Document** - Exports the selected document is the type that its currently assigned as.
 - **Export Quotation Request** – Exports the selected document in the form of a quotation request.
- From the **Export Purchase Document** 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.

Contacts, Vendors and Contractors

With the this module you can keep track of all your business contacts; these can include vendors, suppliers, contractors, co-workers, or just general everyday contacts. As you are more than likely aware, contact information can be extremely valuable to conducting everyday business.

One of the unique features of this module is with its use of **Contact Groups**. Contact groups allow you to group like contacts for easy lookup and reporting purposes. Each contact within the database should be assigned to a group, specifying the services or products they supply. Each contact can be assigned to a countless number of groups, allowing for an almost unlimited cross-referencing setup.

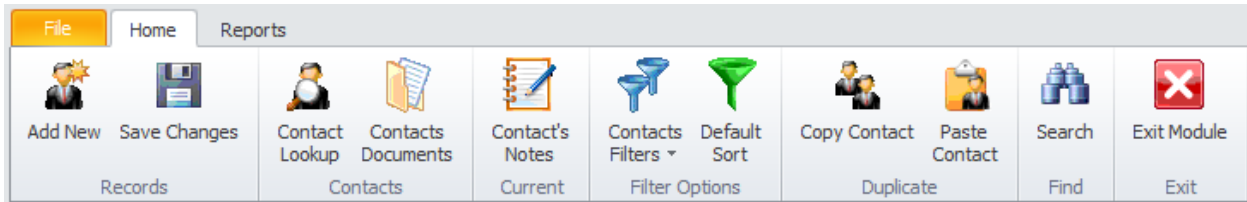
Contact Group Example

Let's say you buy a special motor for one of your cooling towers. You input the vendor into your database for later reference. You also assign this vendor to two different contact groups. One titled Cooling Towers and the other Motors. Now let's say that three years from now that motor again needs replacing, depending on how good your memory is, you may or may not remember where you obtained the last one. With contact groups you are not required to remember. Just open either the Motors or Cooling Tower groups and scroll through the records. You're sure to find the correct contact, and in record time

Ribbon Control

The comprehensive functionality of the **Contacts and Vendors** 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.

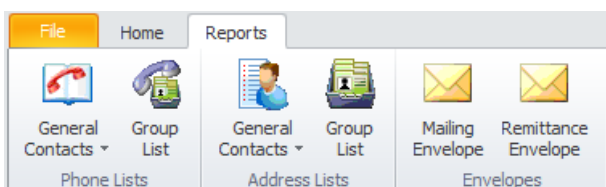
HOME TAB



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).
- **Contact Lookup** – Invokes the **Contacts Lookup** dialog that can have records arranged by groups, or in the standard way.
- **Contact Documents** - Invokes the Documents Database routines as it related to the **Contacts and Vendors** database and discussed in the **Common Features** chapter.
- **Contact's Notes** – Allows the viewing and editing of the notes assigned to the current record.
- **Contacts Filter** – Provides various filter options
 - **Filter by Vendors/Supplies**
 - **Filter by Contractors**
 - **Filter by General Contacts**
- **Default Sort** – Removes all custom filters.
- **Copy Contact** – Copies general fields from the current record, for pasting into a different record.
- **Paste Contact** – Pastes the fields copied with previous routine into the currently selected record.
- **Search** - Invokes the search/find routine on the Lookup Grid.
- **Exit Module** - Close and exits the module.

REPORTS TAB



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

- **Phone Lists/General Contacts** – Provides telephones lists sorted by Company or Contacts.

- **Phone Lists/Group List** – Provides telephone lists sorted by Company or Contacts, and based on a Contact Group.
- **Address Lists/General Contacts** – Provides address lists sorted by Company or Contacts.
- **Address Lists/Group List** – Provides address lists sorted by Company or Contacts, and based on a Contact Group.
- **Mailing Envelope** - Allows you to setup and print #10 envelopes with contact's mailing address as the default.
- **Remittance Envelope** - Allows you to setup and print #10 envelopes with contact's remittance address as the default.

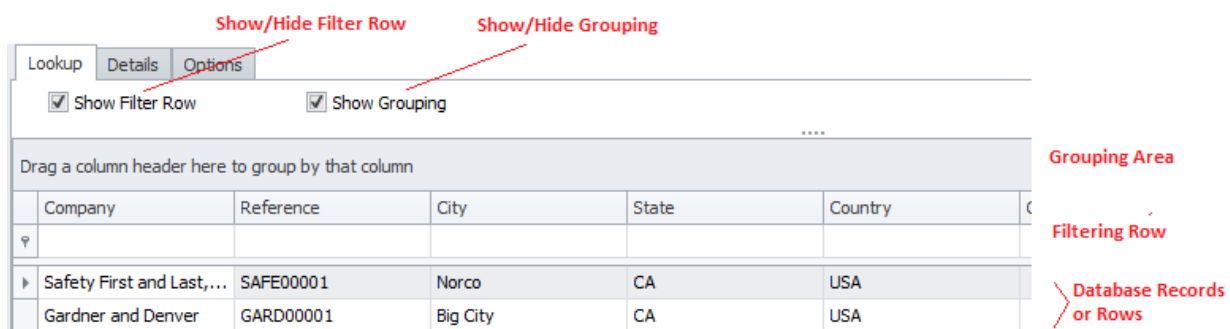
Features of the Contacts and Vendors Module

There are many features of the **Equipment and Assets** 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 records by grouping, filtering and sorting them. All the records in the current filter are located in the grid found here. To select a record and make it the active record, the user needs only to click on the record from within the grid. Once selected the user can click on the other tabs to view or edit the record 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

Details Tab

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

Identification

This section allows you to specify general information about the current contact. This information is found in the **Identification** group, location within the **Details** tab.

The following illustrates the elements found in this section:

The screenshot shows the 'Identification' form with the following fields and buttons:

- Organization:** Safety First and Last, Inc. (Callout: Company Name)
- Reference:** SAFE00001 (Callout: Reference ID)
- Buttons:** Auto (Callout: Generate Reference ID), Check (Callout: Generate Reference ID), Manage (Callout: Account Assignment), Inactive Account (Callout: Indicates an Inactive Account)
- Account:** (Empty dropdown menu)
- Web Site:** www.simplicity-inc.com (Callout: Company URL)
- Buttons:** Open (Callout: View Web-Site)
- Date Established:** 3/1/2011 (Callout: Date Account Established)
- Contact Type:** General Contacts (Callout: Contact Type Assignment)
- Classification:** (Empty dropdown menu) (Callout: Classification Assignment)
- Buttons:** Manage (Callout: Manage)

Organization

This field should provide an organizational name for your contact. This field can contain up to 40 alpha/numeric characters.

Reference ID

This field should be unique in your database, but it's not an enforced rule. It is used to help identify your contact. Edit this field by typing in the space provided. This field can accept up to 25 alpha/numeric characters.

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

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

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.

Inactive Account

Place a checkmark here to indicate an account has become inactive.

Web Site

This is the organization's web site . There is no size limitation to this alpha/numeric field. Clicking the **Open** button adjacent to this field will cause the program to attempt to open the specified web site.

Date Established

This is a date only field and is selectable from the attached drop down calendar. This field would indicate the date a relationship commenced with the current organization.

Contact Type

This field would indicate what type of contact this record applies to and is selectable from the drop down list. Options include:

- Vendor/Suppliers
- Contractors
- General Contacts

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.

Primary Address Information

This section allows you to specify address information about the current contact. This information is found in the **Primary Address Information** group, location within the **Details** tab.

The following illustrates the elements found in this section:

The screenshot shows a form titled "Primary Address Information" with the following fields and labels:

Address 1	1178 McGee Ave			City
Address 2				Street Addresses
City	Norco	State/Region	CA	State or Region
			Select	State/Region Lookup
Postal Code	90456	Country	USA	Country
				Postal (Zip) Code

Address 1/Address 2

These two address fields allows 30 alpha/numeric characters each and could be related to street addresses, PO boxes, or perhaps departments within the organization.

City

This alpha/numeric field can contain up to 30 characters and would indicate the city the organization resides in.

State/Region

This alpha/numeric field can contain up to 30 characters and would indicate the state or region the organization resides in.

Postal Code

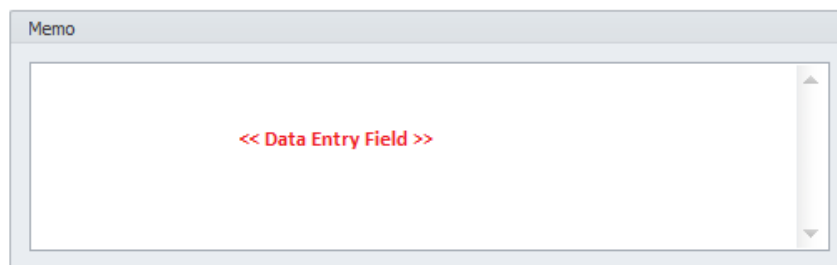
This alpha/numeric field can contain up to 10 characters and would indicate the postal code used by your delivery service.

Country

This alpha/numeric field can contain up to 30 characters and would indicate the country the organization resides in.

Memo

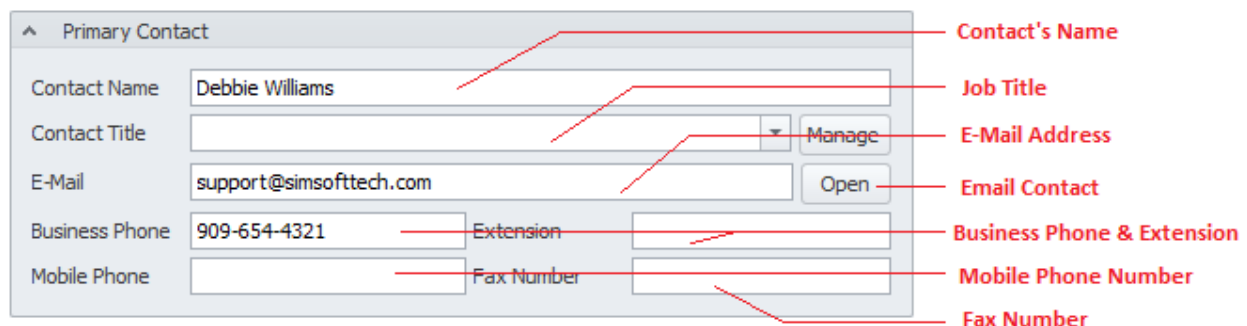
This alpha/numeric field has no size limitation and would contain any information you want to display immediately on the selected contact.

A screenshot of a software interface showing a 'Memo' field. The field is a large rectangular box with a light gray border and a vertical scrollbar on the right side. Inside the box, the text '<< Data Entry Field >>' is displayed in red.

Primary Contact Information

This section allows you to specify information about the primary contact that's assigned to this record.

The following illustrates the elements found in this section:

A screenshot of a software interface showing the 'Primary Contact' section. The section is titled 'Primary Contact' and contains several input fields and buttons. Red lines point from labels on the right to the corresponding fields in the form. The labels are: 'Contact's Name' (points to the 'Contact Name' field), 'Job Title' (points to the 'Contact Title' field), 'E-Mail Address' (points to the 'E-Mail' field), 'Email Contact' (points to the 'Open' button), 'Business Phone & Extension' (points to the 'Business Phone' field and the 'Extension' field), 'Mobile Phone Number' (points to the 'Mobile Phone' field), and 'Fax Number' (points to the 'Fax Number' field). The form fields are: 'Contact Name' (text box with 'Debbie Williams'), 'Contact Title' (text box with a dropdown arrow), 'E-Mail' (text box with 'support@simsofttech.com'), 'Business Phone' (text box with '909-654-4321'), 'Extension' (text box), 'Mobile Phone' (text box), and 'Fax Number' (text box). There are also 'Manage' and 'Open' buttons.

Contact Name

This alpha/numeric field can contain up to 40 characters and would indicate the name of the primary contact.

Contact Title

This field can contain up to 30 alpha/numeric characters and would indicate the contact's job title. You can assign this field by selecting from the drop down list, clicking the **Manage** button, or typing in to the field.

E-Mail Address

This alpha/numeric field has no size limitations and would represent the email address of the selected contact. Clicking **Open** adjacent to this field should invoke the default email application.

Business Phone

This alpha/numeric field can contain up to 15 characters and represents the main business phone number.

Extension

This alpha/numeric field can contain up to 10 characters and represents the phone extension to use with the main business phone number.

Mobile Phone

This alpha/numeric field can contain up to 15 characters and represents the mobile phone number.

Fax Phone

This alpha/numeric field can contain up to 15 characters and represents the fax phone number.

Alternative Contacts

You can assign as many alternate contacts as you would like to a main record. The following illustrates the elements found in this section:

The screenshot shows a software interface for managing alternative contacts. At the top is a table titled 'Alternative Contacts' with columns 'Alt Name' and 'Alt Phone'. It contains one entry: 'Travis Jordan' with phone number '909-654-4322'. Below the table is a data control bar with navigation icons (back, forward, first, last, etc.) and a 'Set as Primary Contact' button. Below the data control are several input fields: 'Contact Name' (Travis Jordan), 'Contact Title' (Sales Rep), 'E-Mail', 'Business Phone' (909-654-4322), 'Extension', 'Mobile Phone', and 'Fax Number'. There are also 'Manage' and 'Open' buttons. Red lines and text annotations point to specific parts of the interface:

- List of Alternate Contacts**: Points to the table containing the contact information.
- Data Control**: Points to the navigation bar below the table.
- Set Selected Contact as Primary Contact**: Points to the 'Set as Primary Contact' button.
- Same data fields as assigned to Primary Contact**: Points to the input fields for contact details.

Add a New Alternative Contact

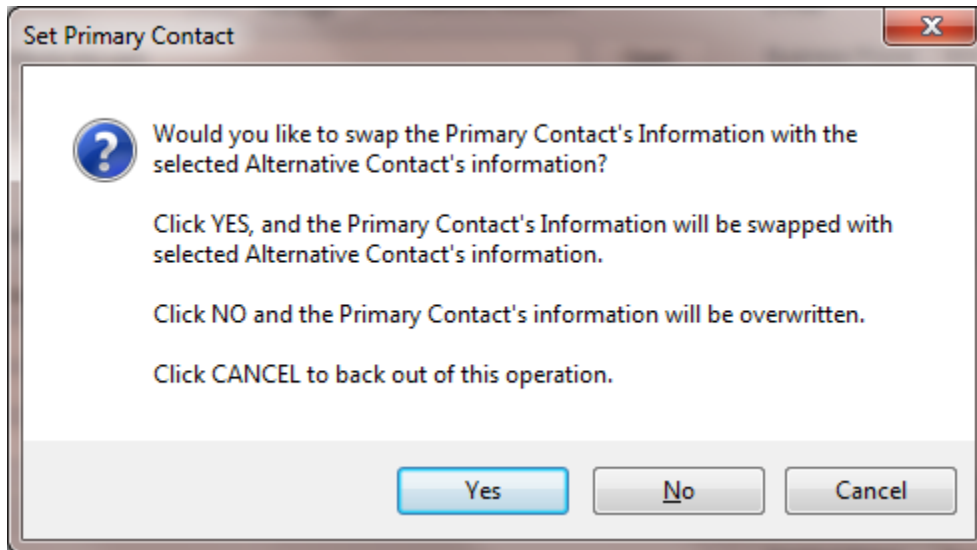
To add a new alternative contact:

- Select and make current the main record that you want to add an alternative contact to.
- Move to the **Details** tab and locate the **Alternative Contacts** group.
- Click on the **Append** (+) button in the data control located there.
- Move through the various fields of this section and fill in the information that's appropriate for the field. The fields within this section have the same properties as the **Primary Contact Information** fields.
- Click on the **Post** (checkmark) button in the data control to save your changes.

Set an Alternative Contact as Primary Contact

To set an alternative contact as the Primary Contact:

- Select and make current the main record that you want to work with.
- Move to the **Details** tab and locate the **Alternative Contacts** group.
- Select the alternate contact that you want to assign from those listed in the grid.
- Click the **Set as Primary Contact** button.



- When prompted about proceeding, click the appropriate response:
 - **Yes** – Clicking this button swaps the contact information between the Primary Contact, and the selected Alternative Contact.
 - **No** – Clicking this button replaces the Primary Contact Information with the selected Alternative Contact. The Alternative Contact's information remains unchanged.
 - **Cancel** – Backs out of this operation.
- Move to the **Home** tab in the ribbon and click **Save Changes**.

***WARNING:** Performing the above operation will overwrite the currently assigned Primary Contact's information.*

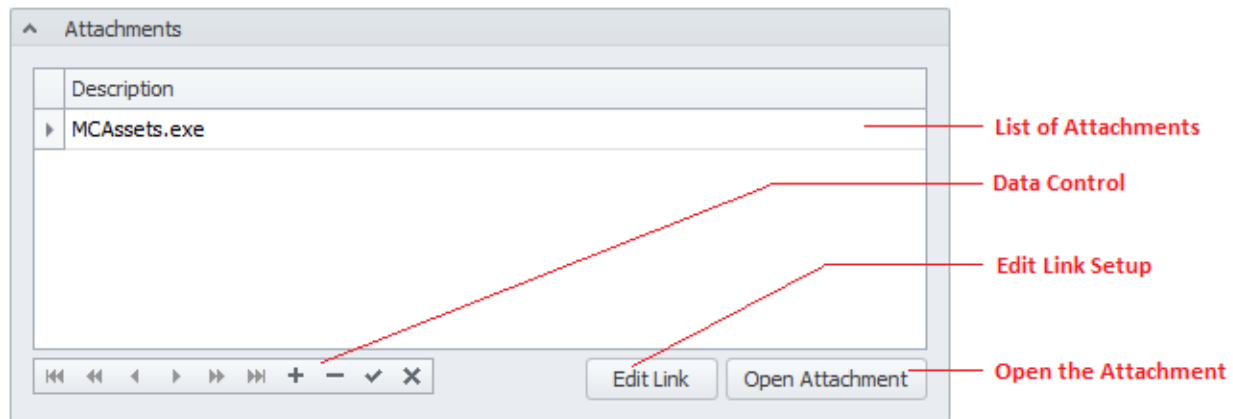
Options Tab

Under the Options tab you can continue making assignments as they apply to the selected record.

Attachments

You can attach as many external files as you would like to a record. These attachments can include images, PDF files 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:



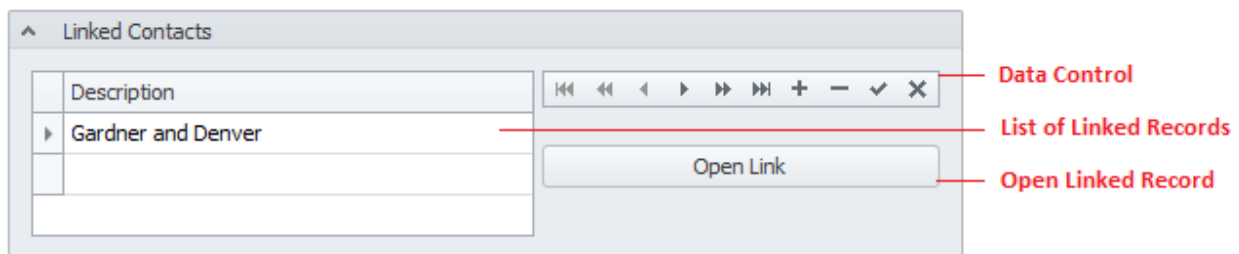
To access the attachments:

- Move to the **Options** tab and locate the **Attachments** group.

Linked Contacts

You can link as many contact records as you would like. Once linked, you only need to click on a single button to move to the linked record.

The following illustrates the elements found in this section:



To create a Linked Contact

- Move to the **Options** tab and locate the **Linked Contacts** group.
- Move to the data control in this section and click on the **Append (+)** button.
- Form the invoked lookup dialog, move to the grid and select the record you want to link to.
- Click the **Select** button.

To open or move to a Linked Contact

- Move to the **Options** tab and locate the **Linked Contacts** group.
- Select the contact record you want to branch to from those listed in the grid.
- Click on the **Open Link** button.

Remittance or Billing Address

This section allows you to maintain the remittance or billing address information as it applies to the selected contact record.

The following illustrates the elements found in this section:

The screenshot shows a form titled "Remittance or Billing" with the following fields and labels:

- Organization:** Safety First and Last, Inc. (Label: Company Name)
- Address 1:** PO Box 7698 (Label: Address Information)
- Address 2:** (Empty field)
- City:** Norco (Label: City)
- State/Region:** CA (Label: State or Region)
- Postal Code:** 98544 (Label: Postal Code)
- Country:** (Empty field) (Label: Country)

There is also a "Select" button next to the State/Region field.

Organization

This field should provide an organizational name for your contact. This field can contain up to 40 alpha/numeric characters.

Address 1/Address 2

These two address fields allow 30 alpha/numeric characters each and could be related to street addresses, PO boxes, or perhaps departments within the organization.

City

This alpha/numeric field can contain up to 30 characters and would indicate the city the organization resides in.

State/Region

This alpha/numeric field can contain up to 30 characters and would indicate the state or region the organization resides in.

Postal Code

This alpha/numeric field can contain up to 10 characters and would indicate the postal code used by your delivery service.

Country

This alpha/numeric field can contain up to 30 characters and would indicate the country the organization resides in.

Rating

You can give your contacts and vendors a rating assignment. This information may prove to be useful when deciding to reuse the selected contact.

The following illustrates the elements found in this section:

The screenshot shows a 'Rating' section with a dropdown menu set to 'Good' and a text area for 'Rating Notes' containing 'Happy so far'.

Rating

Selectable from the drop down list, this is the rating assignment you are applying to the selected record. Options include:

- Poor
- Fair
- Good
- Very Good
- Excellent

Rating Notes

This alpha/numeric field has no size limitations and would be where you would record support information on the current rating.

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:

The screenshot shows the 'Special Fields' section with a 'Group Name' dropdown set to 'General User Fields' and eight 'User Field' input boxes labeled 'User Field 1' through 'User Field 8'.

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** tab as found on the **Options** tab.
- Select the group you want to modify from those listed in the grid.
- Open the **File** menu and expand the **Manage Special Fields** sub menu.
- Click on the **Manage Selected Fields** option.

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.

Group Assignments

Once a contact record has been created it should be assigned to a contact group. This group or groups should indicate the types of services or products supplied by that contact. This makes locating contacts much easier. Each contact can be assigned to a countless number of groups, limited only by disk space and your imagination.

The following illustrates the elements found in this section:



To Assign a record to a Contact Group

- Move to and make current contact record you want to assign a group to.
- Move to the **Options** tab and then click on the **Group Assignments** tab near the bottom.
- Click on the **Add Group** button.
- From the invoked **Contact Groups** dialog, move and select the group you want to assign from those listed.
- Click on the **Select** button.

Add a Contact Record

To add a new contact 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

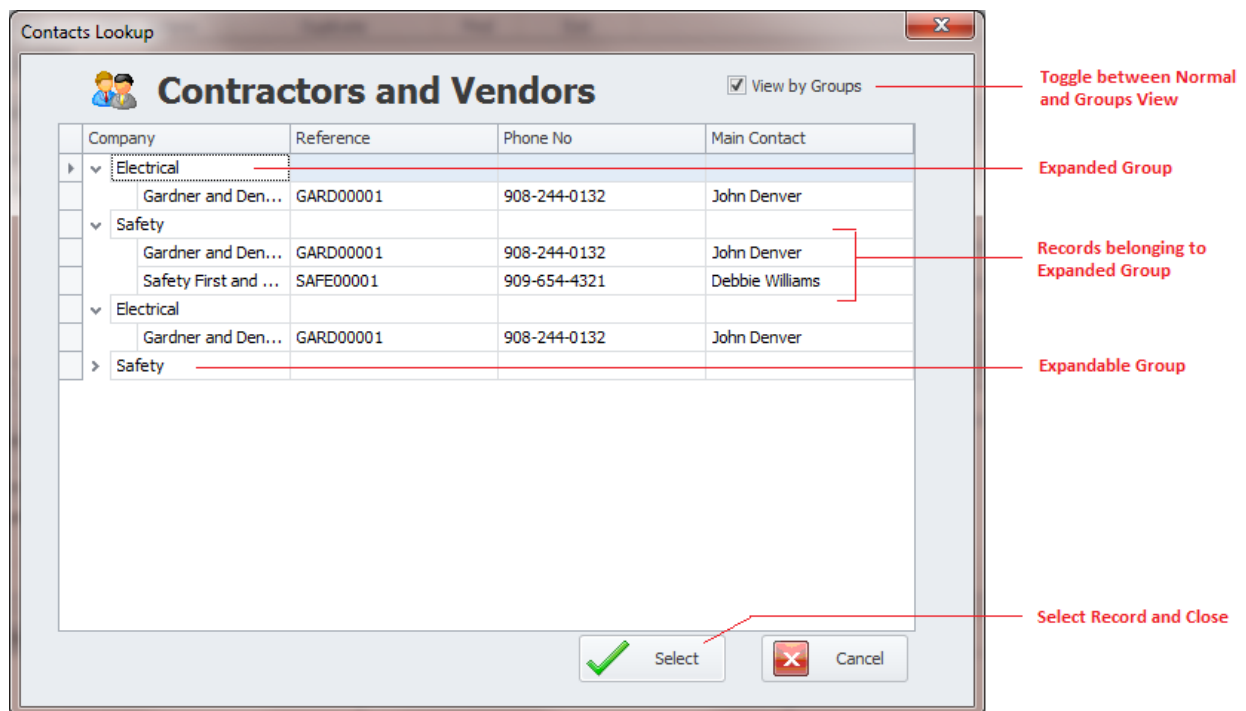
To save changes to the main record, click on the **Post** (✓ check) button in the *Data Control* located within the ribbon's **Quick Access** toolbar.

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.

Contacts Lookup

You can look up and select records from the **Lookup** tab, but sometimes locating items arranged in **Groups** will streamline things, and simplify the lookup process. This is where you will want to use the **Contacts Lookup** option.

The following illustrates the elements of the **Contacts Lookup** dialog screen:



- **View by Groups** – Toggles how the lookup grid is displayed.
 - **Checked** – When checked the database records are arranged in groups. Clicking on the > button opens or expands the group.
 - **Unchecked** – When unchecked, the grid is layout as found on most lookup dialogs used by the system.
- **Grid** – Contains a list of available records.
- **Select** – Clicking this button accepts the selected record.

To access the Contacts Lookup

- Move to the **Home** tab in the ribbon.
- Click on the **Contact Lookup** option.

Contacts Documents Database

This module supports its own **Documents Database**. To see how to use this feature, please refer to the [Documents Database](#) section of the [Common Features](#) chapter.

To access the Documents Database:

- Move to the **Home** tab in the ribbon and select the **Contacts Documents** option.

Contact's Notes

You can keep detailed notes on each 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 Notes option:

- With the record selected, move to the **Home** tab in the ribbon.
- Click on the **Contact's Notes** button.

Contacts Filters

You can filter the contacts database by how contacts are assigned. To filter the database by type assignments:

- Move to the **Home** tab in the ribbon, and then expand the **Contacts Filter** drop down by clicking on it.
- Click one of the following filter options:
 - **Filter by Vendors/Supplies**
 - **Filter by Contractors**
 - **Filter by General Contacts**

Default Sort

This options removes any custom filters, and returns to the original startup filter. To activate the default filter:

- Move to the **Home** tab in the ribbon and click on the **Default Sort** button.

Copy and Pasting a Contact Record

At times you may find that you have two or more contacts with almost identical information. Because this happens occasionally when working with contacts we have provided you with a way to copy a contact's record to be pasted into another's.

To copy a contact record to be pasted into another record:

- Locate and make active the record you want to copy.
- Move to the **Home** tab of the ribbon and click on the **Copy Contact** option.
- Locate and make active the record you want to paste into.
- Move to the **Home** tab in the ribbon and click on the **Paste Contact** option.

Search

To perform a search on the **Contacts and Vendors** 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.

Phone List Report

To create a phone list report on your contacts:

Contact Phone List		
Gardner and Denver	John Denver	908-244-0132
Safety First and Last, Inc	Debbie Williams	909-654-4321

- Move to the **Reports** tab in the ribbon.
- Move to the **Phone Lists** group in the ribbon and expand the **General Contacts** option by clicking. Next click on how you want report sorted by. Options include:
 - **Sort by Company**
 - **Sort by Client**

Group Phone List Report

To create a phone list report based on a contact group:

Group: Safety		
Gardner and Denver	John Denver	908-244-0132
Safety First and Last, Inc	Debbie Williams	909-654-4321

- Move to the **Reports** tab in the ribbon.
- Move to the **Phone Lists** group and click on the **Group List** option.
- From the invoked **Contact Groups** dialog, select the group in the grid that you want base your report on.
- Click on the **Select** button.

Contact List Report

To create a contact list report on your contacts:

Contact List		
Gardner and Denver 4489 Township Rd Big City, CA 92344	John Denver jdenver@hol.com	908-244-0132 Fax: 906-909-9090
Safety First and Last, Inc 1178 McGee Ave Norco, CA 90456	Debbie Williams support@simsofttech.com	909-654-4321

- Move to the **Reports** tab in the ribbon.
- Move to the **Address Lists** group in the ribbon and expand the **General Contacts** option by clicking. Next click on how you want report sorted by. Options include:
 - **Sort by Company**
 - **Sort by Client**

Group Contact List Report

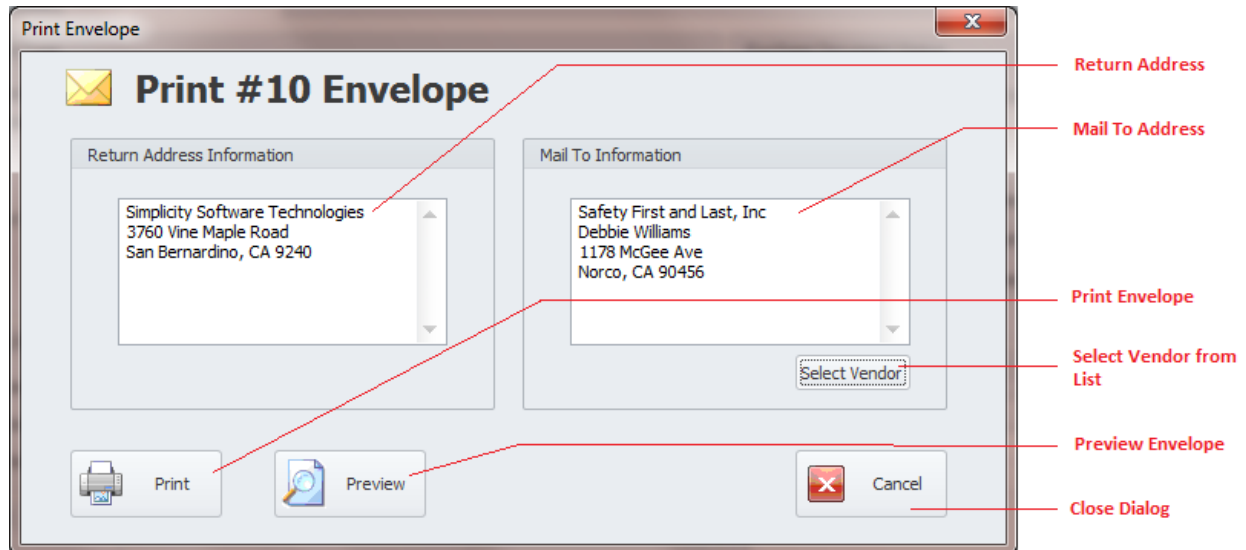
To create a contact list report based on a contact group:

Group: Safety		
Gardner and Denver 4489 Township Rd Big City, CA 92344	John Denver jdenver@hol.com	908-244-0132 Fax: 906-909-9090
Safety First and Last, Inc 1178 McGee Ave Norco, CA 90456	Debbie Williams support@simsofttech.com	909-654-4321

- Move to the **Reports** tab in the ribbon.
- Move to the **Address Lists** group and click on the **Group List** option.
- From the invoked **Contact Groups** dialog, select the group in the grid that you want base your report on.
- Click on the **Select** button.

Print No. 10 Envelopes

You can create and **Print a No. 10 Envelope** with the ***Contacts and Vendors*** module.



To Print a #10 Envelope:

- From the ***Contacts and Vendors*** module, move to the Reports tab in the ribbon.
- Move to the **Envelopes** group and select the type of envelope you want to print. The Mail To Information will default to the envelope type you choose. Options include:
 - **Mailing Envelope**
 - **Remittance Envelope**
- Move the **Return Address Information** text box and edit this information.
- Move the **Mail To Information** text box and edit this information.
- To select and insert a vendor, move to and click in the **Select Vendor** button.
- Move to the grid and select the record you want to insert, then click on the **Select** button.
- Click on either the **Print** or **Print Preview** buttons.
- Click **Cancel** when done.

The fields of this dialog are not connected to any database, so there is not size limitations applied to these alpha/numeric fields.

Print Options

To print the current contact record:

Safety First and Last, Inc - SAFE00001
Debbie Williams

General Information

Company: **Safety First and Last, Inc**
Reference: **SAFE00001**
Address: **1178 McGee Ave**
Address:
City: **Norco**
State: **CA**
Postal Code: **90456**
Country: **USA**
Rating: **Good**
Contact Type: **General Contact**

Primary Contact

Name: **Debbie Williams**
Title:
Phone: **909-654-4321**
Extension:
Mobile Phone:
Fax Number:
Email: **support@simsofttech.com**

User Defined Fields

User Field 1
User Field 2

- Locate and select the record you want to print.
- Open the **File** menu and expand the **Print Options** menu by clicking on it.
- Click on the Print Option of your choice:
 - **Print Current Contact** - 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 record.

Personal Manager

The **Personal Manager** module is a feature designed for your whole team. With this module you can plan your tasks, schedule events in advance, keep detailed logs of your activities, plus create and track work orders and purchasing documents.

This feature rich module is broken into even more modules or components, with each component providing its own unique features or options. With the **Personal Manager** module you have the ability to assign each user their own 'personal database'. This way the information they have access to belong to only them, without having to share information with other users.

For many of your users this maybe the only module they really need access to. This is because many team members may not need to access inventory control, and work order management features. However, creating occasional purchase requests and work requests may come in handy for them. This module allows then access to these features without making them deal with complexities of the other, full featured modules.



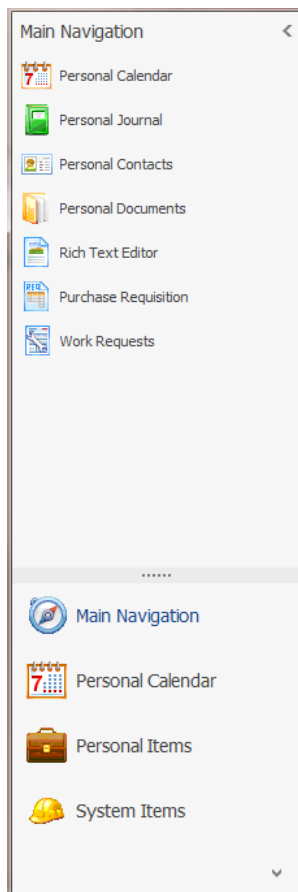
The following is a summary of the available options within this module:

- **Personal Calendar** – This allows you to schedule events using a calendar or scheduler and on an individual bases.
- **Personal Journal** - This allows you to record your personal or business related activities in the Rich Text Format, and on a daily bases if wanted.

- **Personal Contacts** – This allows you to maintain a personal contact list.
- **Personal Tasks** – Create a personal to-do list.
- **Personal Documents** – This option makes use of the **Documents** feature of the system, but for personal use.
- **Rich Text Editor** – This option allows for the creation and editing of documents using a rich text format editor, and is also highly compatible with various versions of Microsoft Word®.
- **Purchase Requisitions** – This option allows the creation and tracking of personal Purchase Requisitions.
- **Work Orders** – This option allows the creation and tracking of work requests.

Navigating the Personal Manager

The following outlines the possible options that can be used in the navigation between the components of this module.



Option One – 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 module.

- 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.

Option Two – Using the Menu

The menu is represented as various buttons, displayed both horizontally and vertically on the screen. Each button has a title, an icon and a brief description of the feature that can be accessed.

To branch to a feature within this module using the main menu:

- Move to the main menu by using the **Exit** ribbon option of the feature currently opened, or as displayed when first accessing this module.
- Click on the button of your choice.

Personal Calendar

This section describes the capabilities provided by the **Personal Calendar**, which is used for scheduling/calendar activities for individuals.

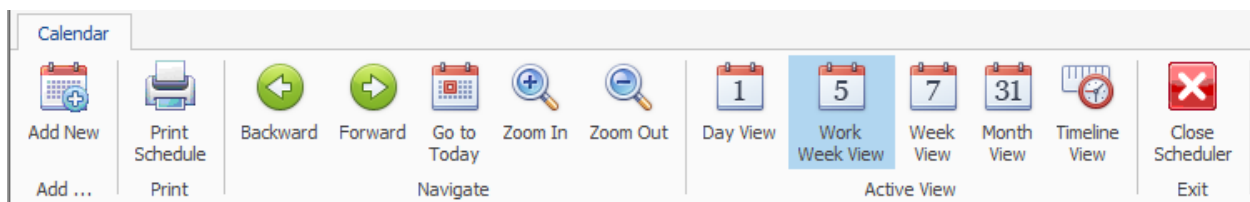
Access the Personal Calendar

To access the **Personal Calendar**:

- Click on the **Personal Calendar** group in the Navigation Bar or
- Click the **Personal Calendar** button in the main menu

Calendar - Ribbon

The functionality of the **Personal Scheduler** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Calendar** ribbon control, reading left to right:

- **Add New** – Invokes the **Appointment Dialog** box that will assist in the creation of a new appointment.
- **Print Schedule** –Invokes the **Print Setup** dialog screen.
- **Backward** – Moves backwards through the current Active View.
- **Forward** – Moves forwards through the current Active View.
- **Go To Today** - Moves focus to the current date, preserving the existing view mode.
- **Zoom In** – Zooms in on the current view.
- **Zoom Out** – Zooms out on the current view.
- **Day View** - This view provides the most detailed view of appointments for a certain day.
- **Work Week View** - This view displays appointments for the working days in a particular week.
- **Week View** - This view displays appointments for any given week.
- **Month View** - The month view is the least detailed of the views, and is designed to allow browsing and long-term plan analysis. This view positions the days one after another horizontally, so that they form weeks, while weeks are placed one under the other.
- **Timeline View** - This view plots appointments as horizontal bars along the timescales, and provides a clearer overview for scheduling purposes.

Print Schedule

The **Print Schedule** routines are invoked through the use of the Scheduler's **Page Setup** dialog screen. To access the **Page Setup** dialog screen:

- Click on the **Print Schedule** option in the ribbon control.

To preview the schedule:

- From the **Page Setup** dialog, click on the **Print Preview** button.

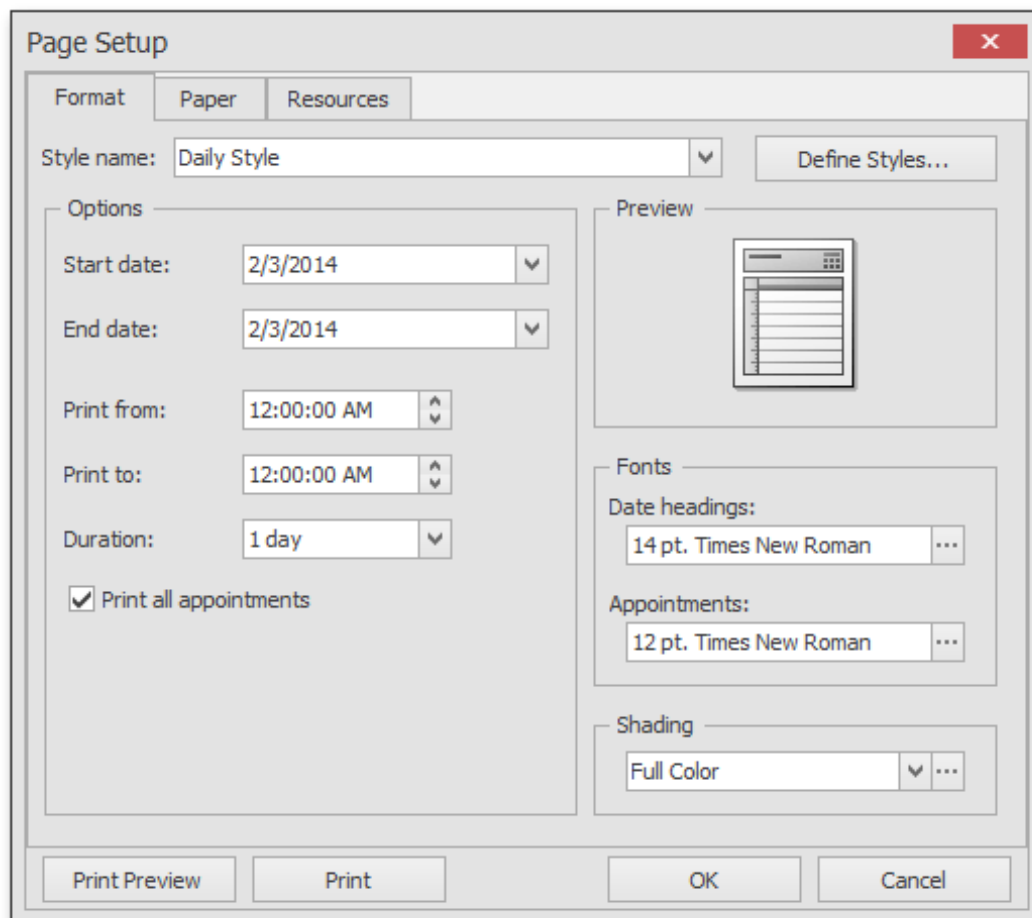
To print the schedule:

- From the **Page Setup** dialog, click on the **Print** button.

Page Setup

The **Page Setup** dialog allows the user to specify what to print, including view style, date range, paper type and more. The user can also perform a Print Preview, or a direct print from this dialog.

The following illustrations show the three tabs available to the **Page Setup** dialog:



Page Setup [X]

Format | **Paper** | Resources

Paper

Type:

- Letter
- Legal
- Executive
- A5
- B5
- A4**
- B4
- A3
- Envelope Monarch

Paper source: Auto

Page

Size:

- A4
- A4 Half
- Billfold
- Pocket
- 1/2 sheet booklet
- 1/4 sheet booklet

Dimensions: Width: 8.27 " Height: 11.69 "

Margins

Top: 1.00 " Left: 1.00 "

Bottom: 1.00 " Right: 1.00 "

Page orientation

☒ Portrait
☐ Landscape

☐ Apply settings to all styles

Print Preview | Print | OK | Cancel

Page Setup [X]

Format | **Paper** | Resources

☒ Print all resources on one page Resources per page: 1

☒ Use current grouping of the active view Group by: None

☐ Print using the custom collection Resources kind: All resources

Custom collection

Available resources: FirstRes, SecondRes

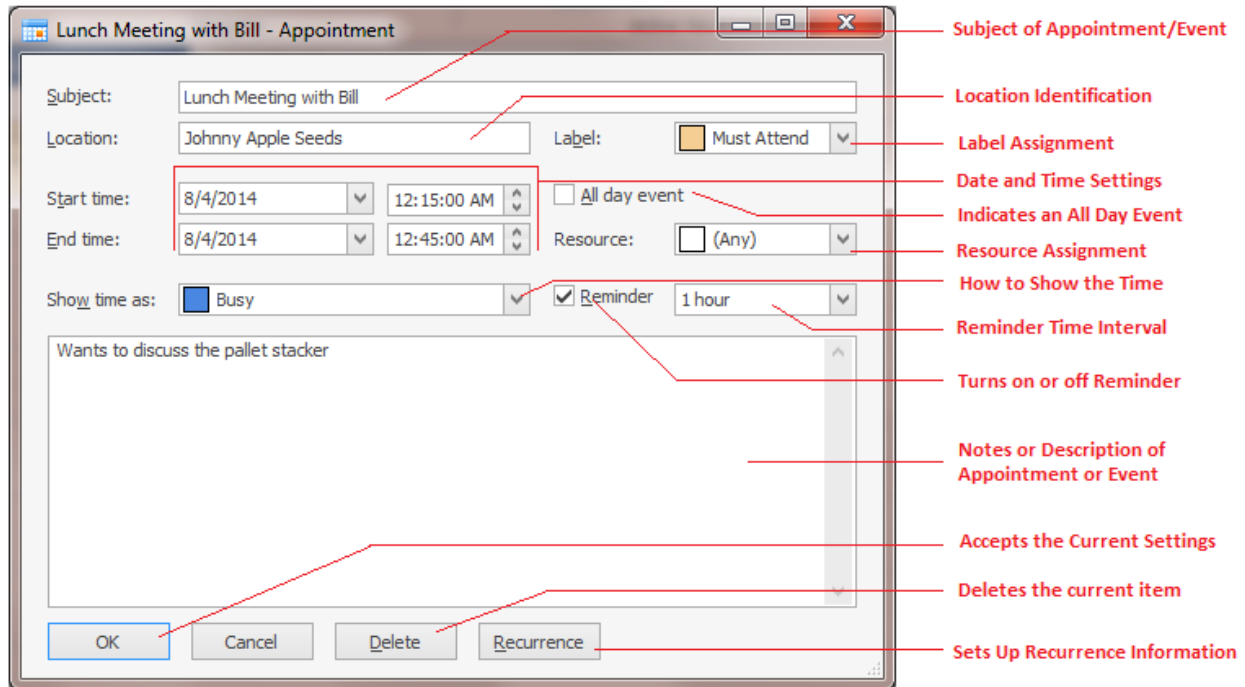
Resources to print:

> >> << < Up Down

Print Preview | Print | OK | Cancel

Edit Appointments – Events Dialog

Appointments and events are created and edited using the **Appointments – Events** dialog as illustrated next:



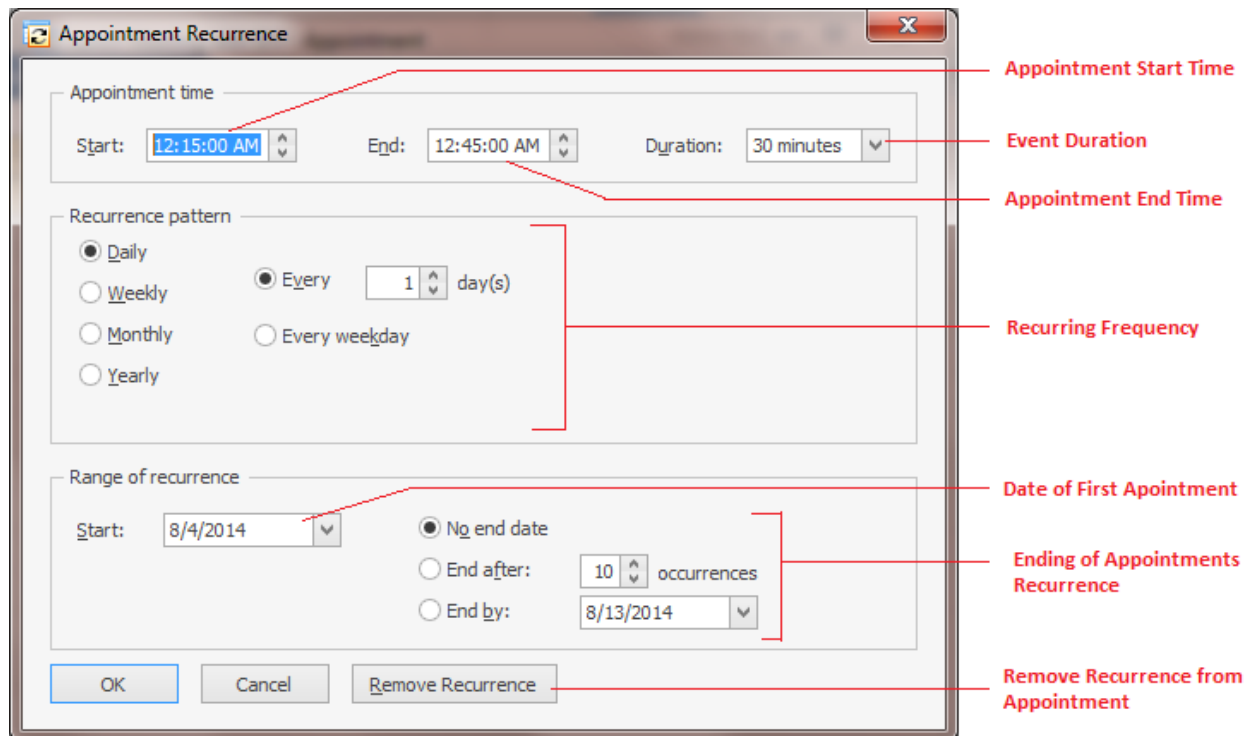
The following are the elements of the Appointment – Events dialog:

- **Subject** – This alpha/numeric field can contain up to 100 characters and would indicate the subject matter as it applies to the current item.
- **Location**– This alpha/numeric field can contain up to 50 characters and would indicate the location as it applies to the current event.
- **Label** – This field is selectable from the drop down list, and would indicate the label to use to help identify this item. Options include: None, Important, Business, Personal, Vacation, Must Attend, Travel Required, Needs Preparation, Birthday, Anniversary and Phone Call.
- **Start time** – These date and time fields would indicate the event scheduled start, and are selectable from there attached editors.
- **End time** – These date and time fields would indicate the event scheduled end, and are selectable from there attached editors
- **All Day event** – Placing a check here would indicate events that last all day, ignoring scheduled times.
- **Resources** - This field is selectable from the drop down list, and would indicate the resource assignment. This option is not currently in use as only one resource is assigned per database.
- **Show time as** – This field would indicate how you want the item displayed and is selectable from the drop down list. Items include: Free, Tentative, Busy, Out of Office, Working Elsewhere.

- **Reminder** – Checking this option allows the pop-up reminder to be used. The drop down here would indicate the time frame to use for the reminder.
- **Notes or Description** – The big text area is for use as the notes or description area of the item. This alpha/numeric field has no size limitation.
- **OK** – Accept the appointment as setup.
- **Delete** – Delete the activity.
- **Recurrence** – Click this button allow you to setup recurrence information as it applies to the current activity.

Recurrence Dialog

The **Recurrence** Dialog is used to setup appointments or events recurrence. The following illustrates the elements of this dialog:



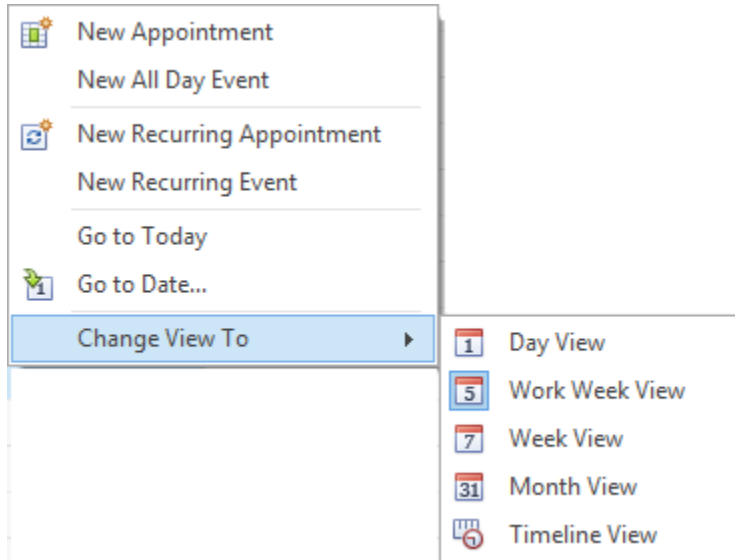
Create New Appointment

- To Create a new appointment:
 - Click on the **Add New** option in the ribbon control, or
 - Double click on a blank time slot in the current view, or
 - Right mouse click in the current calendar view and select the appointment type you want to create from those listed.
 - New Appointment
 - New All Day Event
 - New Recurring Appointment

- New Recurring Event
- Follow the instructions on the **Appointment – Event**, and the **Recurrence Dialogs** to complete the creation process.

Calendar Popup Menu

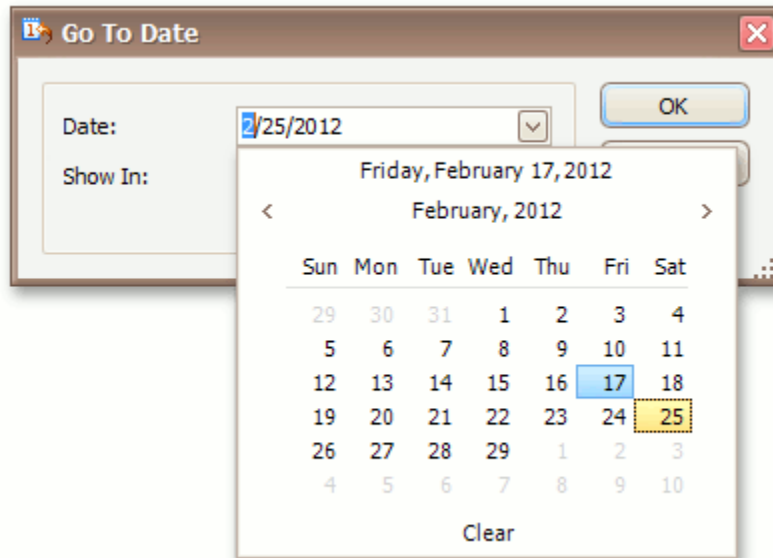
The **Personal Calendar** has a pop up menu associated with it. This menu is invoked by right mouse clicking over the calendar control. The following illustrate this popup menu:



The following are the options found on this popup menu:

- **New Appointment** - Invokes the **Edit Appointment** dialog.
- **New All Day Event** - Invokes the **Edit Event** dialog, which is used to create a new all-day appointment (also called 'all-day event'). The dialog is identical to **Edit Appointment** (used above), except that in this case, the **All day** event option is checked, its time range is measured in days (not hours) and marked as Free. The appointment can be transformed into an all-day event and vice-versa by checking this box.
- **New Recurring Appointment** - All appointments maintained by the scheduler can either be simple (non-recurring - i.e., they happen only once), or recurring - occurring multiple times within a specified time interval. Selecting this menu item invokes the **Edit Appointment** dialog, used to create a new appointment, and also invokes the **Appointment Recurrence** dialog, which allows the recurrence pattern to be specified for the new appointment.
- **New Recurring Event** - Selecting this menu item invokes the **Event editor** dialog used to create a new all-day appointment, and also invokes the **Appointment Recurrence** dialog, which allows the recurrence pattern to be specified for the new event.

- **Go to This Day** - Only available in the **Week View** and **Month View** modes. This item is active when only one day is selected, and when activated, displays the target day in the **Day View** mode.
- **Go to Today** - Moves focus to the current date, preserving the existing view mode.
- **Go to Date...** - Invokes the **Go To Date** dialog to select the date and view type. The date can be selected either by using the calendar or by entering a string with the placeholders. To select the desired view type, use the **Show In** drop-down box.



- **Change View To** – The pop out menu allows you to change calendar view types.

Calendar Date Navigator

The calendar is accompanied by the **date navigator**. Use it to navigate through dates. This **Date Navigator** is located in navigational bar on the left side of the screen, and is only visible when the **Personal Calendar** is in use.

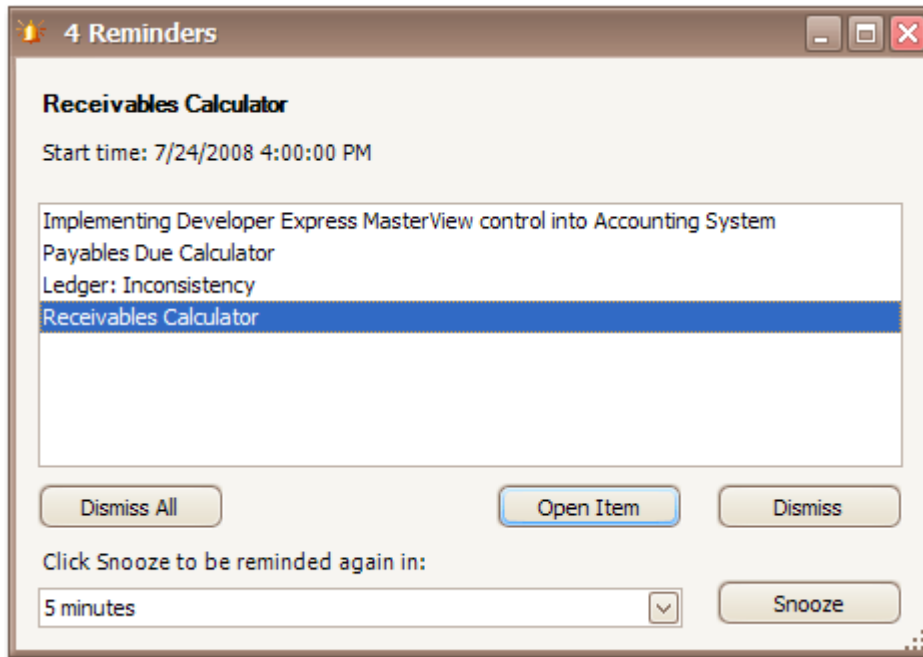


You can select either a particular date, or a range of dates in the date navigator, and the scheduler will display your selection using a **Day View**. The table below details how you can select dates in different ways.

Action	Effect
Click a date	A single date is selected and the scheduler displays it using the Day View . If the currently active view is of another type, it is automatically changed to Day View .
Click and drag across multiple dates --or-- click a start date, hold down the SHIFT key and click an end date	The continuous range of dates is selected. The scheduler displays it using the Day View , irrespective of the size of the selected range.
Hold down the CTRL key and click several dates	A set of dates is selected. The scheduler displays it using the Day View , irrespective of the size of the selected range.
Click a week number	A corresponding week-long range is selected. The scheduler displays it using the Day View .

Popup Reminders

When the time has come for the reminder alert, it invokes the notification dialog, as illustrated below.

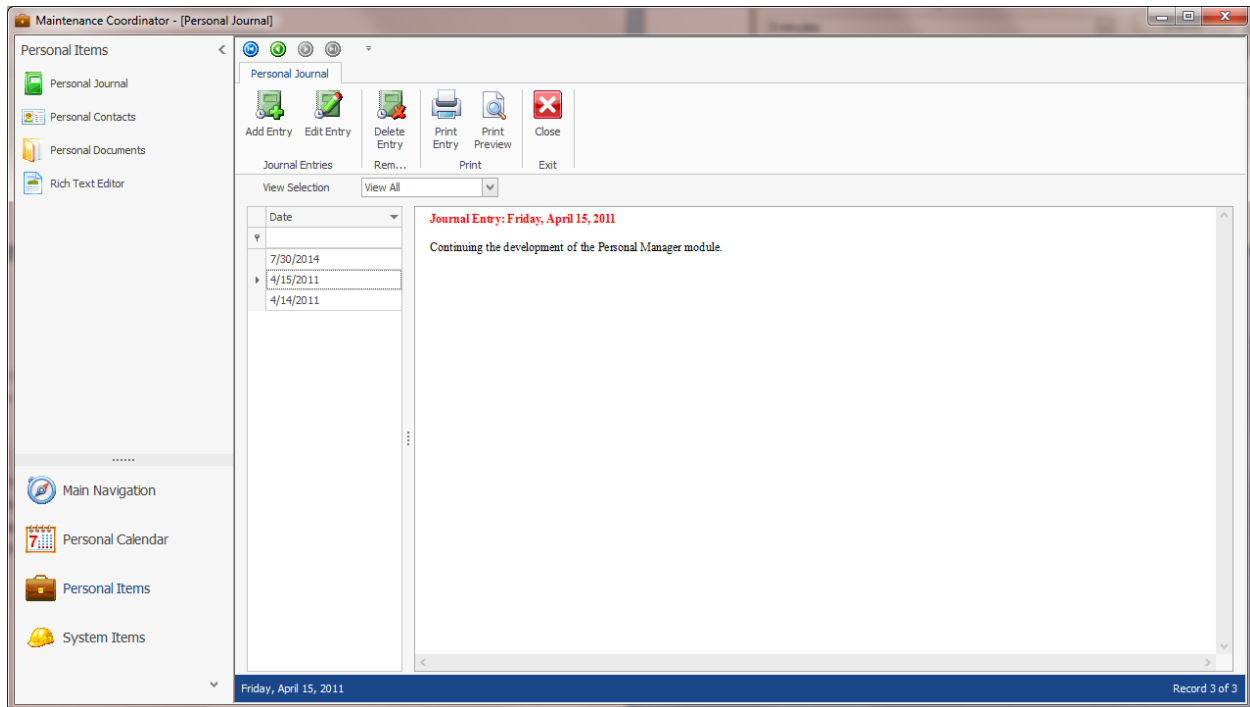


You can switch the reminders off by clicking the **Dismiss** or **Dismiss All** buttons.

Another option is to shift the alert time by selecting the time interval in the combo box and clicking the **Snooze** button. Then, the notification will be postponed for a specified time frame.

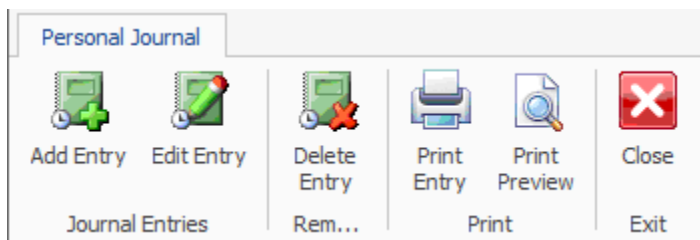
Personal Journal

Use the **Personal Journal** to record all the important activities you've done for the day or week. This option features a what-you-see-is-what-you-get word processor with many formatting options. A smart manager is a well-organized manager, and this feature allows for just this. Keep yourself covered by keeping a detailed record of your actions and observations.



Personal Journal - Ribbon

The functionality of the **Personal Journal** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Personal Journal** ribbon control, reading left to right:

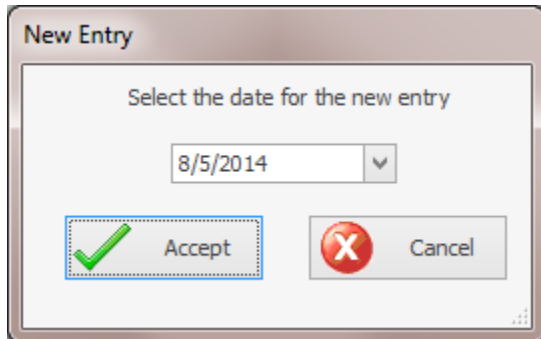
- **Add Entry** - Invokes the **New Entry** dialog to assist in creating a new record.
- **Edit Entry** - Invokes the RTF Editor to allow you to edit the selected entry.
- **Delete Entry** – Allows you to delete the selected entry.
- **Print Entry** – Allows you to print the document attached to the selected entry.
- **Preview Entry** – Provides a print preview of the entry's main document.

Journal's Rich Text Editor

The **Personal Journal** makes use of the build in **Rich Text Editor** to create and edit the main entry information. Please refer to the [Rich Text Editor](#) chapter to learn more about this editor.

Create New Journal Entry

To create a new entry to the journal:



- Click on the **Add Entry** option in the ribbon control.
- From the invoked **New Entry** dialog, move to drop down calendar and select the date of the entry.
- Click the **Accept** button.
- Edit your entry using the **Rich Text Editor**, clicking on the **Save and Close** option in the ribbon when done.

Edit a Journal Entry

To edit an existing entry:

- Move to the **View Selection** drop down and select a filter option found there.
- Move to the Grid and select the date that holds the entry you want to view or edit.
- Click on the **Edit Entry** option in the ribbon.
- Edit your entry using the **Rich Text Editor**, clicking on the **Save and Close** option in the ribbon when done.

Delete a Journal Entry

To delete an existing entry:

- Move to the **View Selection** drop down and select a filter option found there.
- Move to Grid and select the date that holds the entry you want to remove.
- Click on the **Delete Entry** option in the ribbon.
- When prompted about the deletion, click the **Yes** button.

Printing a Journal Entry

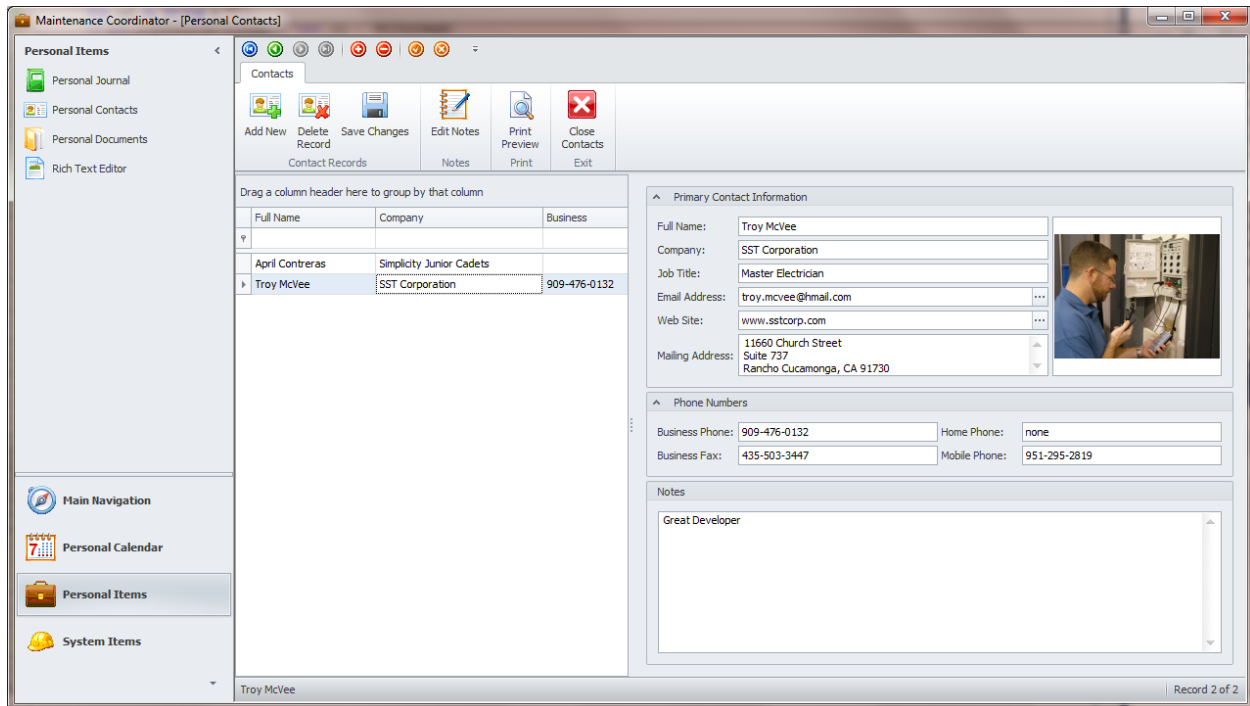
To print an existing entry:

- Move to the **View Selection** drop down and select a filter option found there.
- Move to the Grid and select the date that holds the entry you want to print.

- Move to the **Print** group in the ribbon and click on either the **Print Entry** or **Print Preview** options.

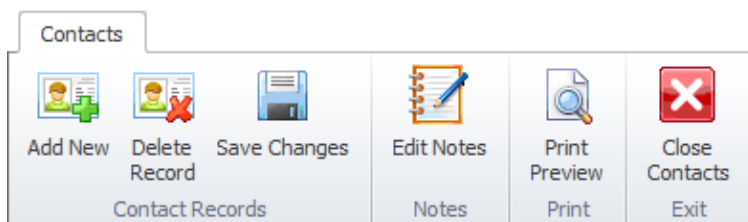
Personal Contacts

Use the **Personal Contacts** to record information on your contacts that don't really related to the main application. With this feature you can record general information, attach an image of the contact, and include notes.



Personal Contacts - Ribbon

The functionality of the **Personal Contacts** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

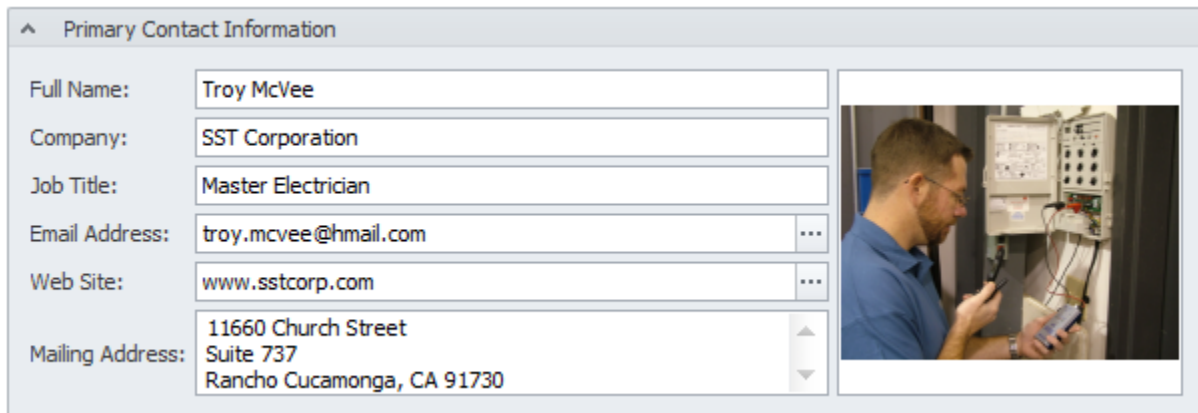


The following are the elements on the **Personal Contacts** ribbon control, reading left to right:

- **Add New** – Creates a new blank record in the database.
- **Delete Record** – Deletes the currently selected record.
- **Save Changes** – Posts or save new or changed data back to the database.
- **Edit Notes** – Opens the **Text Editor** with the current contact's notes.
- **Print Preview** – Allows you create a print preview of the current record.
- **Close Contacts** – Exits **Personal Contacts** and invokes the menu screen.

Primary Contact Information

The following are the elements found in this section:



Primary Contact Information

Full Name: Troy McVee

Company: SST Corporation

Job Title: Master Electrician

Email Address: troy.mcvee@hmail.com ...

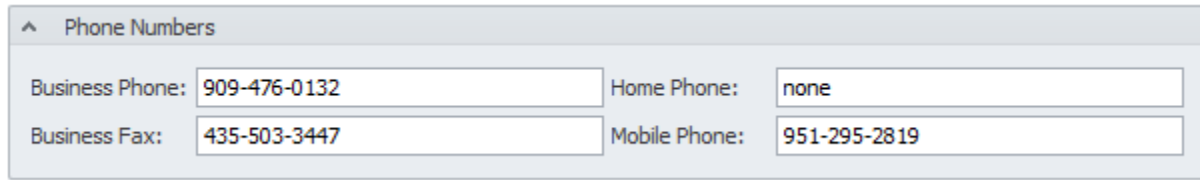
Web Site: www.sstcorp.com ...

Mailing Address: 11660 Church Street
Suite 737
Rancho Cucamonga, CA 91730

- **Full Name** – This alpha/numeric field can contain up to 40 characters and represents the contact's name.
- **Company** – This alpha/numeric field can contain up to 40 characters and represents the organization the contact is associated with.
- **Job Title** – This alpha/numeric field can contain up to 40 characters and represents the contact's job title.
- **Email** – This alpha/numeric field has no size limitation and represents the contact's email address. Clicking the ellipsis button attached to this field will open the default email program with the contact's email address inserted.
- **Web Site** – This alpha/numeric field has no size limitation and represents the contact's web site. Clicking the ellipsis button attached to this field will open the default internet application and will navigate to the selected web site.
- **Mailing Address** – This alpha/numeric field has no size limitation and represents the contact's mailing address.

Contact Phone Numbers

All the fields in this section would represent a telephone number as it applies to the selected contact record. These are alpha/numeric fields and each can hold up to 20 characters.



The screenshot shows a form titled "Phone Numbers" with a collapse icon (upward arrow) on the left. It contains four text input fields arranged in a 2x2 grid. The first row contains "Business Phone:" with the value "909-476-0132" and "Home Phone:" with the value "none". The second row contains "Business Fax:" with the value "435-503-3447" and "Mobile Phone:" with the value "951-295-2819".

Business Phone:	909-476-0132	Home Phone:	none
Business Fax:	435-503-3447	Mobile Phone:	951-295-2819

Contact Notes

This alpha/numeric field has no size limitation and can contain any type of information you want to include on the selected contact record.

To edit the Contact **Notes** with a text editor:

- Move to and click on the **Edit Notes** option in the ribbon.

Add a Contact Record

To add a new contact record:

- Move to the ribbon and click on the **Add New** option.
- Move through the various fields and edit the new record.
- Click on the **Save Changes** button in the ribbon.

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 any underlying records click on the **Save Changes** button found on the ribbon control.

Print Preview Contact Record

To create a print preview of the current record:

- Move to the ribbon and click on the **Print Preview** option.

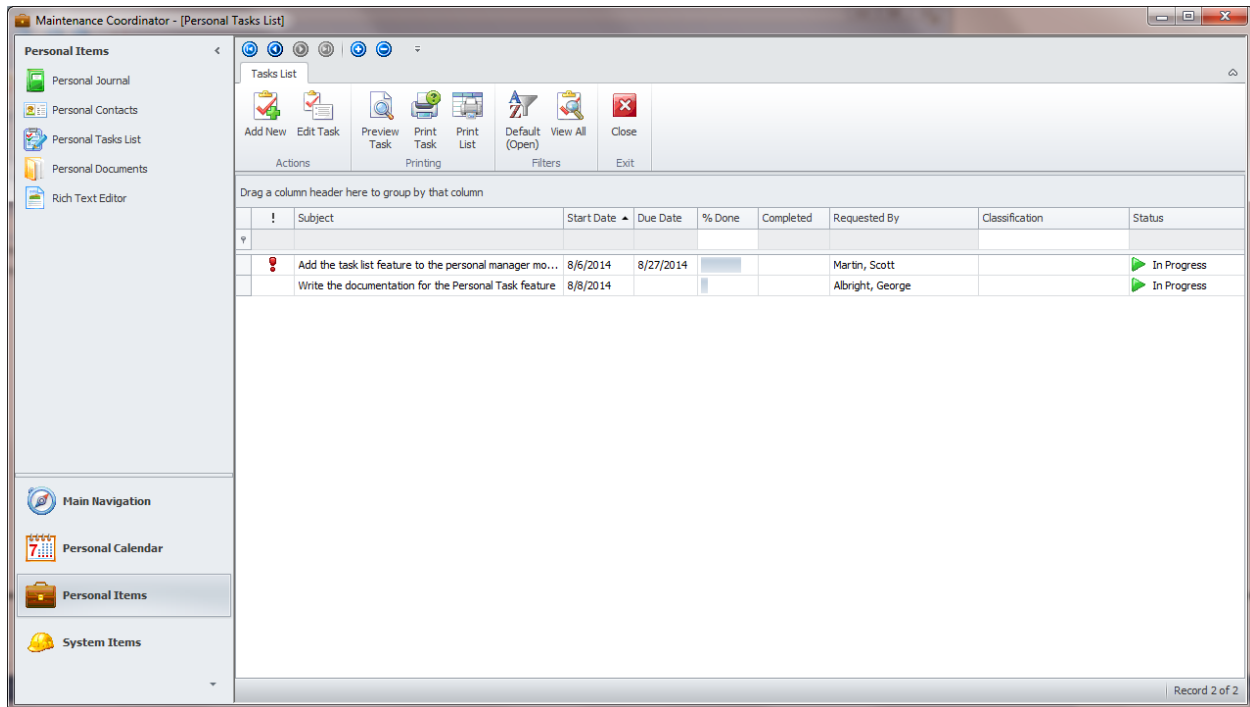
Delete a Contact Record

To delete an existing entry:

- Move to Grid and select the record you want to remove.
- Click on the **Delete Record** option in the ribbon.

Personal Tasks List

Many of your users are sure to have a list of items that need their attention. This is where the **Personal Tasks List** will come in handy. With this feature you can create yourself a list of items that need completion. Give each of these tasks a priority indicator and then sort this list by that indicator.

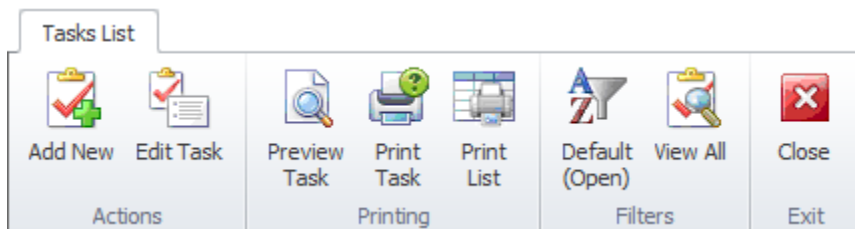


To access the Personal Tasks List:

- Move to the **Personal Items** tab in the **Navigation Bar**.
- Click on the **Personal Tasks List** option.

Personal Tasks List - Ribbon

The functionality of the **Personal Tasks List** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Personal Tasks List** ribbon control, reading left to right:

- **Add New** – Creates a new task record and opens it in the **Personal Task Editor**.
- **Edit Task** – Allows you to edit and delete a pre-existing task.
- **Print** – Prints the task record as it related to the selected record
- **Print Preview** – Provides a print preview of the task record
- **Print List** – Prints the current list of tasks
- **Default Filter** – Filters the database by documents with an open status

- **View All** – Allows you to view all tasks regardless of status
- **Close** - Exits **Personal Task List** and invokes the menu screen

Adding a New Task

To add a new task:

- Move to the **Personal Tasks List** screen.
- Move to the ribbon and click on the **Add New** button.
- Follow the instructions on using the *Personal Task Editor* as found in this chapter.

Editing a Task

To edit a pre-existing task:

- Move to the **Personal Tasks List** screen.
- Move to the list of tasks and select the task you want to edit.
- Move to the ribbon and click on the **Edit Task** button.
- Follow the instructions on using the *Personal Task Editor* as found in this chapter.

Printing a Task

You can print the selected work order:

- Select and make active the task record you want to print.
- Locate the **Print Options** group in the ribbon.
- Click on the **Print** or **Print Preview** options.

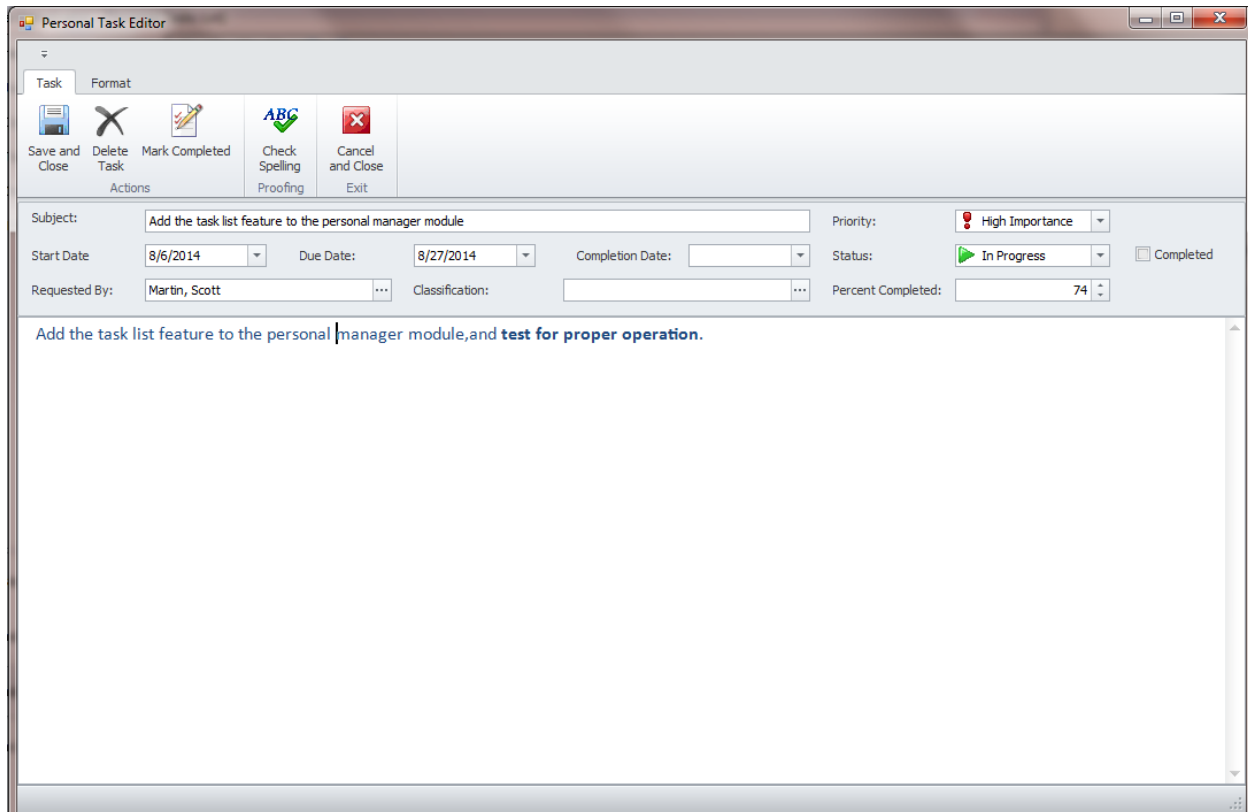
Print Tasks List

To print the entire tasks list as currently shown:

- Move to the **Personal Tasks List** screen.
- Move to the ribbon and click on the **Print List** button

Personal Tasks Editor

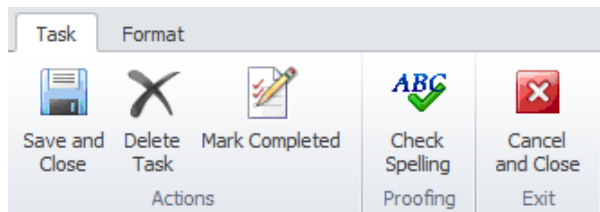
Tasks are created and edited using the **Task Editor**. This editor allows you to setup specifics about a task.



Personal Tasks Editor - Ribbon

The functionality of the **Personal Tasks Editor** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

The ribbon found here has two tab pages, **Tasks** and **Format**. The **Tasks** page is exclusive to the editor and will be explained. The **Format** page deals with formatting the main body of the tasks and share features of the **Rich Text Editor**. Please refer to the [Rich Text Editor](#) chapter for information on the options available on the **Format** ribbon page.



The following are the elements on the **Tasks** page in the ribbon control, reading left to right:

- **Save and Close** – Saves any changes made and closes this editor.
- **Delete Task** – Deletes and removes the loaded task from the database.
- **Mark as Completed** – Moves through the various task fields marking the task as completed.

- **Check Spelling** – Checks the spelling as it applies to the main body of the task.
- **Cancel and Close** – Closes the editor without applying any changes made to the task.

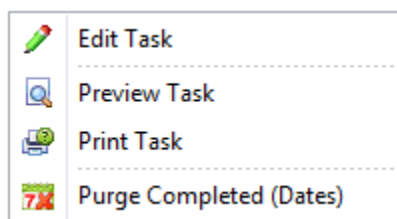
Elements of the Task Editor

The following is an outline of the data input fields as it relates to the **Personal Tasks Editor**:

- **Subject** – This alpha/numeric field can contain up to 100 characters. Use this field to provide a brief identification for the task.
- **Priority** – Selectable from the drop down list, this would indicate the priority you are assigning to the tasks. Option include: **High Importance**, **Normal** and **Low Importance**.
- **Start Date** – This date only field would indicate the scheduled date work on this task will commence.
- **Due Date** – This date only field would indicate the date you would like this task to be completed by.
- **Completion Date** – This date only field would indicate the actual date the task was completed.
- **Status** – Selectable from the drop down list, this would indicate the current status of the task. Options include: **Not Started**, **In Progress**, **Completed**, **On Hold** and **Deferred**.
- **Completed** – When checked would indicate that the task has been completed.
- **Requested By** – This alpha/numeric field can contain up to 30 characters. Use this field to show who requested this task. You can select an employee by clicking on the ellipse button attached to this field.
- **Classification** – This alpha/numeric field can contain up to 30 characters. Use this field to assign a classification to the tasks.
- **Percent Completed** – This field is used to indicate how much of the task has been completed. This numeric only field will accept values in the range of 0 to 100.
- **Main Editor** – This area is used to outline the complete task. There is no size limitation to this field and it makes use of a rich text editor allowing many formatting options.

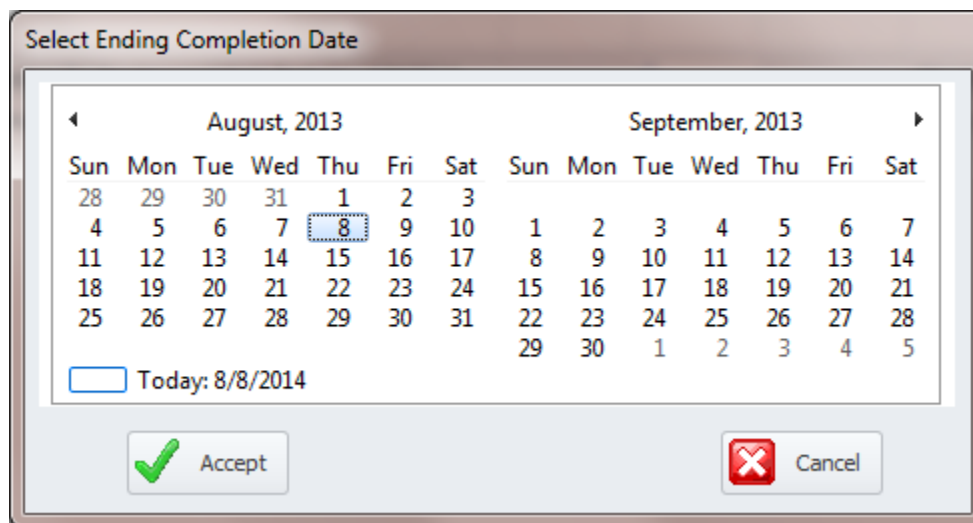
Purging Older Tasks Records

Once you've been using the **Personal Tasks** for a while, you may want to purge or delete some of the older, completed tasks out of the database. To do this:



- Move to the **Personal Tasks List** screen.
- Move to the list of tasks and right-mouse click on the grid.
- Select the **Purge Completed (Dates)** option.

- From the invoked calendar, select the ending date of the purge. All completed tasks prior to this date will be removed from the database.



- Click on the **Accept** button.
- When prompt about the deletion, click on the **OK** button to proceed.

Personal Documents

This module supports its own **Documents Database**. To see how to use this feature, please refer to the [Documents Database](#) section of the [Common Features](#) chapter.

To access the **Documents Database**:

- Move to the **Personal Items** tab in the **Navigation Bar**.
- Click on the **Personal Documents** option.

Rich Text Editor (Word Processor)

This module supports the use of the **Rich Text Editor**. To see how to use this feature, please refer to the [Rich Text Editor](#) chapter.

To access the Rich Text Editor:

- Move to the **Personal Items** tab in the **Navigation Bar**.
- Click on the **Rich Text Editor** option.

Purchase Requisitions

With the [Purchase Requisitions](#) feature you can create purchase requisitions and then track their progress. Purchase documents found here will be filtered to only show the documents that have the

current user assigned as the requester. However, if there is no user assigned, then the filter will not be applied.

Document Status

Number: 1102-00002
 Current Status: On Hold
 Type Status: Purchase Order
☐ Document Approved for Purchase

Supplier

GARD00001
 Gardner and Denver
 4489 Township Rd
 Big City, CA 92344

Ordering Information

Date Ordered:
 Date Promised:
 Date Closed:

Purchase Items List

Drag a column header here to group by that column

Qty	Part No	Description	Unit Type	Account	Qty Received
5	LG-0085 Mens	Latex Gloves	Each	General Use	0
12	LG-0067 Mens	Leather Gloves	Dozen	General Use	0
5	WD-440	Spray Lubricant - Northwest Easy Lubes	Each		0
5		Safety Goggles - Safe-R-Us	Each		0

1102-00002 | Record 1 of 5

NOTE: Purchase Documents can be created and viewed in this module, but they cannot be modified or deleted.

To access the **Purchase Requisitions**:

- Move to the **System Items** tab in the **Navigation Bar**.
- Click on the **Purchase Requisition** option.

Purchase Requisition - Ribbon

The functionality of the **Purchase Requisitions** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.

Purchasing

Add Requisition (Create)
 Print (Summary)
 Print Preview
 Default Filter
 Filter by Requester (Filters)
 Close (Exit)

The following are the elements on the **Purchase Requisitions** ribbon control, reading left to right:

- **Add Requisition** – Invokes the **Purchasing Wizard** that steps your through the creation process.

- **Print** – Prints a summary type document as it related to the selected record.
- **Print Preview** – Provides a print preview of the current document.
- **Default Filter** – Filters the database by documents with an open status.
- **Filter by Requester** – Allows you to filter the database by:
 - **Open Only**
 - **Show All**
- **Close** - Exits **Purchase Requisitions** and invokes the menu screen.

Adding a New Purchase Requisition

To add a new Purchase Requisition:

- Move to the **Purchase Requisition** screen.
- Move to the ribbon and click on the **Add Requisition** button.
- Follow the instructions on using the *Purchasing Wizard* as found in the *Purchasing and Receiving* chapter.

Printing a Requisition Summary Document

You can print a summary on the selected document by:

- Select and make active the purchasing record you want to print.
- Locate the **Summary** group in the ribbon.
- Click on the **Print** or **Print Preview** options.

Default Filter

If there is a user assigned to this module, this option returns all open records belonging to the assigned user. Otherwise all open records are returned regardless of the user. To filter the database by default settings:

- Click on the **Default Filter** option in the ribbon.

Filter by Requester

There are two options available here, **Open Only** and **View All**. If this module has an assigned user, then these options returns records where the user is assigned as the document's requester. If this module has no assigned user, then you will be prompted to select one.

To filter the database where a user has been assigned to this module:

- Move to the ribbon and click on the **Filter by Requester** option to expand the drop down.
- Click on either the **Open Only** or **View All** options.

To filter the database where a NO user has been assigned to this module:

- Move to the ribbon and click on the **Filter by Requester** option to expand the drop down.
- Click on either the **Open Only** or **View All** options.

- From the invoked lookup dialog, select the employee record of your choice.
- Click on the **Select** button.

Work Requests

With the **Work Requests** feature you can create work requests and then track their progress. **Work Orders** found here will be filtered to only show the documents that have the current user assigned as either the requester, or as a mechanic assignment. However, if there is no user assigned, then this filter will not be applied.

Unlike the **Purchase Requisitions** feature, this feature will also return documents by assignments. That is to say if the assigned user is also a mechanic, and they have been assigned as one of the primary work assignments on the work orders, these work orders will also be displayed.

NOTE: Work Order Documents can be created and viewed in this module, but they cannot be modified or deleted.

Maintenance Coordinator - [System Work Orders]

System Items

- Purchase Requisition
- Work Requests

Work Orders

Add New Print Print Preview Default Filter Filter by Requester Filter by Assignments Close Exit

Lookup Details

Work Order Identification

Subject: Trash compactor not working Task ID: 1101--3 Date Created: 1/15/2011 9:41 AM

Type and Recurrence

Task Type: Standard Work Order Recurrence:

Scheduling

Start Date: 4/15/2013 End Date: 4/30/2013

Status

Status: New Request Completion Date:

Task Instructions or Comments for PMs

Compactor is non-operational and needs repairing

Completion Notes and Delays

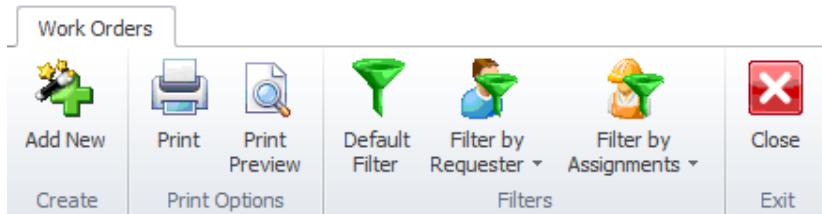
Record 1 of 16

To access the Work Requests:

- Move to the **System Items** tab in the **Navigation Bar**.
- Click on the **Work Requests** option.

Work Requests - Ribbon

The functionality of the **Work Requests** is provided via the ribbon control. This control is structurally and visually split into logical groups. Each of these groups includes commands that perform specific functions.



The following are the elements on the **Work Requests** ribbon control, reading left to right:

- **Add New** – Invokes the **Work Orders Wizard** that steps you through the creation process.
- **Print** – Prints the work order document as it related to the selected record.
- **Print Preview** – Provides a print preview of the current document.
- **Default Filter** – Filters the database by documents with an open status.
- **Filter by Requester** – Allows you to filter the database by:
 - **Open Only**
 - **Show All**
- **Filter by Assignments** – Allows you to filter the database by:
 - **Open Only**
 - **Show All**
- **Close** - Exits **Work Requests** and invokes the menu screen.

Adding a New Work Request

To add a new Work Request:

- Move to the **Work Requests** screen.
- Move to the ribbon and click on the **Add New** button.
- Follow the instructions on using the **Work Order Wizard** as found in the **Work and Requests Orders** chapter.

Printing a Work Order

You can print the selected work order:

- Select and make active the work order record you want to print.
- Locate the **Print Options** group in the ribbon.
- Click on the **Print** or **Print Preview** options.

Default Filter

If there is a user assigned to this module, this option returns all open records belonging to the assigned user, and where this user is assigned as the requester, or as a primary work assignment. If no user is assigned to this module then all open records are returned. To filter the database by default settings:

- Click on the **Default Filter** option in the ribbon.

Filter by Requester

There are two options available here, **Open Only** and **View All**. If this module has an assigned user, then these options return records where the user is assigned as the document's requester. If this module has no assigned user, then you will be prompt to select one.

To filter the database where a user has been assigned to this module:

- Move to the ribbon and click on the **Filter by Requester** option to expand the drop down.
- Click on either the **Open Only** or **View All** options.

To filter the database where NO user has been assigned to this module:

- Move to the ribbon and click on the **Filter by Requester** option to expand the drop down.
- Click on either the **Open Only** or **View All** options.
- From the invoked lookup dialog, select the employee record of your choice.
- Click on the **Select** button.

Filter by Assignments

There are two options available here, **Open Only** and **View All**. If this module has an assigned user, then these options return records where the user is assigned as one of the primary work assignments. If this module has no assigned user, then you will be prompt to select one.

To filter the database where a user has been assigned to this module:

- Move to the ribbon and click on the **Filter by Assignments** option to expand the drop down.
- Click on either the **Open Only** or **View All** options.

To filter the database where NO user has been assigned to this module:

- Move to the ribbon and click on the **Filter by Assignments** option to expand the drop down.
- Click on either the **Open Only** or **View All** options.
- From the invoked lookup dialog, select the employee record of your choice.
- Click on the **Select** button.