



PM COORDINATOR

A red toolbox with a silver handle and a silver wrench is positioned behind the text 'COORDINATOR'. The toolbox is a bright red color with a silver handle on top and a silver wrench lying diagonally across the front. The text 'PM' is positioned above the toolbox, and 'COORDINATOR' is written across the front of the toolbox.

ADVANCED COMPUTERIZED MAINTENANCE MANAGEMENT SOFTWARE

VERSION 7.x

USERS GUIDE

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CONTACT INFORMATION

PM Coordinator Software System

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Simplicity Software Technologies Inc.

GENERAL CONTACT INFORMATION

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PROGRAM FUNDAMENTALS

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 95 or later.
- Select the Programs option.
- Click on the PM Coordinator option to start the program.

Validating the Software

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.
- Run the application in your normal manner.
- Open the *File* menu and select the *Validate Demo Version* option.
- Use the file open dialog box and locate the activation file supplied. This would normally be found on your A: drive.
- Once located click on this file to select it and click on the *Open* button. The program will now read this file, and if the file is in a valid format it will turn a demo version into a full working version.

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.

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 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 has been completed, 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.**

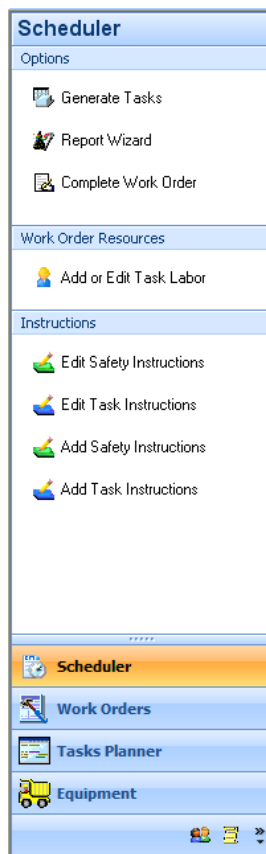
Also note that we normal use first class mail to deliver these software keys to you, so please be on the lookout for this letter/

To enter your software key:

- Open the *File* menu and select the *Software Key* option.
- Enter the key in the space provided.
- Click *Ok*.

IMPORTANT NOTE: As with validating the software, the software key must also be used for each installation. Please keep this key information, as well as the validating file in a safe place.

Moving Between Modules and Shortcuts



The PM Coordinator program is arranged in modules, with each module providing it own functions and features. The modules are accessed mainly through the use of the programs *Main Menu (along the top)* or the *Shortcut Bar* as shown here.

To move between program modules, you must:

Move to and click on the main button that best describes the module you want to access within the shortcut bar.

Each module in the system has their own shortcuts assigned to them in the Shortcut bar. To activate a shortcut:

Move to one of the main sections that contain the module you want to access by clicking on its title.

Move to the various shortcut options located under that section. Place your mouse pointer over that option and click on it to activate.

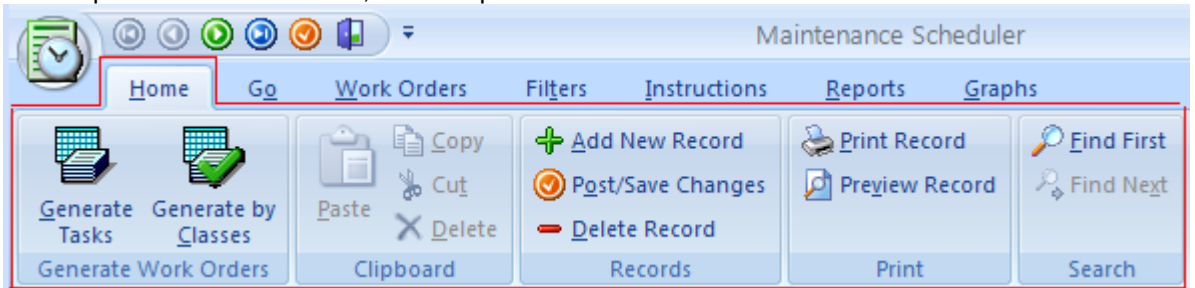
You can also branch to the available modules by accessing the Go drop down menu in the program's main menu (along the top).

Please note that you may also have other buttons in the shortcut bar that are minimized. You can access these buttons by clicking directly on them, or by resizing the shortcut bar to view the buttons.

You can resize the shortcut bar by left clicking over the resizing handles (....), and then dragging the shortcut bar to view more or less buttons.

Use the Ribbon

When you first start some of the modules in the Maintenance Coordinator system, you may be surprised by what you see. The menus and toolbars in most of modules have been replaced with the Ribbon, which is part of the Microsoft Office Fluent user interface.



The Ribbon as it appears in the Maintenance Scheduler module


The Ribbon is designed to help you quickly find the commands that you need to complete a task. Commands are organized in logical groups, which are collected together under tabs. Each tab relates to a type of activity, such as clipboard functions.

Minimize the Ribbon

The Ribbon is designed to help you quickly find the commands that you need to complete a task. Commands are organized in logical groups that are collected together under tabs. Each tab relates to a type of activity, such as creating reports, filtering the database or other routines.

There is no way to delete or replace the Ribbon with the toolbars and menus from the earlier versions. However, you can minimize the Ribbon to make more space available on your screen.

Always keep the Ribbon minimized


- Click Customize Quick Access Toolbar 

- In the list, click Minimize the Ribbon.
- To use the Ribbon while it is minimized, click the tab you want to use, and then click the option or command you want to use.

Keep the Ribbon minimized for a short time

To quickly minimize the Ribbon, double-click the name of the active tab. Double-click a tab again to restore the Ribbon.


Restore the Ribbon

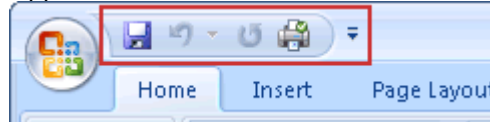
Click Customize Quick Access Toolbar .
In the list, click Minimize the Ribbon.

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.

Customize the Quick Access Toolbar


- Move the Quick Access Toolbar
- The Quick Access Toolbar can be located in one of two places:
- Upper-left corner next to the Coordinator Button  (default location)




- Below the Ribbon, which is part of the Microsoft Office Fluent user interface



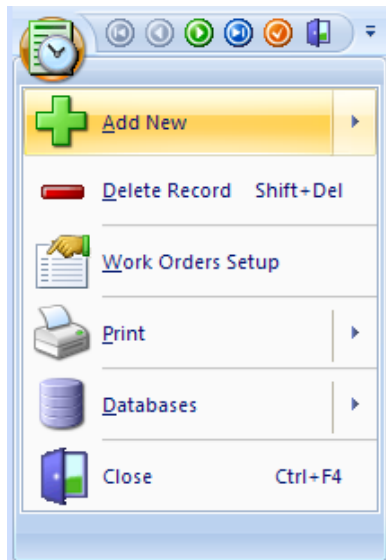
- If you don't want the Quick Access Toolbar to be displayed in its current location, you can move it to the other location. If you find that the default

location next to the Coordinator or Module Button  is too far from your work area to be convenient, you may want to move it closer to your work area. The location below the Ribbon encroaches on the work area.

Therefore, if you want to maximize the work area, you may want to keep the Quick Access Toolbar in its default location.

- Click Customize Quick Access Toolbar .
- In the list, click Show Below the Ribbon or Show Above the Ribbon.

The Coordinator or Module Button



In the upper left hand corner of the new ribbon control is the Coordinator or Module button. This is the same style of button that Microsoft calls the Office button in their Office 2007 suite. In Office, this button has the Office icon displayed in it. In our modules, we have an icon that is representative of the module it's installed in.

Clicking on this button will open a pop up 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 Coordinator or Module button is a direct replacement for the File menu.

Sample Databases

When you run the program for the first time there will be a sample database installed for your use. Use this sample database to help you get use to the program. Change and add records, view and run some of the reports, and get a good feel for the program.

When you're done using the sample database, and feel comfortable with the program, you will be ready to begin using your own databases. To start using your own databases please look into the following sections:

- Creating New Databases
- Database Settings

Creating New Databases

The *PM 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 to destroy it. It could also be useful when wanting to keep information from different locations or clients separate, using a different database for each location for example.

To create a new database, please follow these steps:

- Start the program in your normal manner.
- Open the *Databases* drop down menu for the main menu of the program and select the *Create New Databases* option.
- Next move to the *Save In* drop down list box and setup the folder or directory you wish to save your new database in.
- Now move to the *File Name* text box and enter the name you want this database to have. Good examples here could be MyCompanyPMs
- Once everything is setup to your liking move to and click on the SAVE command button.

Database Settings

You can and need to setup database information for your program. With single user licenses, the database can only reside on your local C: drive. On Unlimited Users versions, the database can reside anywhere, such as a shared or mapped network drive.

To setup the database path:

- Move to the *Database* drop down menu and select the *Database Path* option.
- Next move to the *Open File* drop down list box and setup the folder or directory your database resides in
- Click on the database file to select it.
- Once everything is setup to your liking move to and click on the OPEN command button.

Compact and Repair Database

As you add and delete data in a database, the file can become fragmented, and use more disk space than necessary. Periodically you should compact your databases in order to defragment the file. The resulting compacted database will usually be smaller.

Essentially what the program does is copies the data from one database to another. In the process, the data in the resulting database is organized contiguously to recover disk space.

Since, during this operation the programs does create a duplicate copy of the database, you must have enough disk space available for both copies.

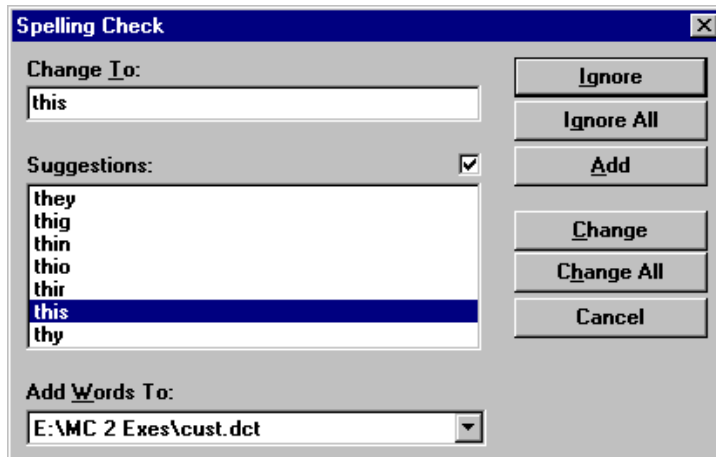
The repair database function will try to repair any Microsoft Access compatible database, which is the database format used by this program. The repair function will repair a database that was left invalid by an incomplete write operation. This can happen when an application quits unexpectedly because of a power failure or other computer hardware problems.

To compact and repair a database, please follow these steps:

- Start the program in your normal manner.
- Ensure all modules are closed.
- Open the *Databases* drop down menu for the main menu of the program and select the *Compact and Repair Databases* option.
- Move to the *Drives* drop down list and select the drive the database is located on.
- Move to the *Directory* list box and click on the directory that the database is saved in.
- Move to the *Files* list box and select the database file of your choice.
- Now either double click on the file of your choice or click on the OK command button. If everything was done correctly the program will try to repair your database.

Spell Check

Spell checking is available for use throughout the program. The Notepad, Editor, and the various sections that contain forms have a built in, 250,000 + word spell check.



To use the built in spell checker, you must:

- Open the *Tools* menu, the *Spelling* menu or click on the Spell Check button, depending on which module and screen you are currently working in.
- Select the *Spell Check* option.
- When the spell checker encounters a misspelled word, the "Word Not Found In Dictionary" dialog box will appear. From here you have the following choices:
 - IGNORE - The misspell word is ignored, and spell checking continues.
 - IGNORE ALL - The present occurrence and all future occurrences of the misspelled word are ignored.
 - CHANGE - Here you can replace the misspelled word with the word in the *Suggestions* list box. Or you can choose a word from the list box by clicking on it to select it. You can also correct the word in the *Not in Dictionary* text box by typing in it, and then hitting the *Change* button.
 - CHANGE ALL - works just like the *Change* button, but the program will replace all occurrences of the misspelled word without any more prompts.
 - ADD – Adds the misspelled word to the custom dictionary.

Data Quick Entry

Time-saving features we have installed in most of the input screens used by the program are what we call "Data Quick Entry" routines. These routines are used to store information that you 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 quick entry dialog box, select the text from a list, and have it automatically inserted for you.



Each text field in the program, which works with these routines, have there own databases. For example, if you call up the listing while in the "Description" text field, you'll get a different list of items than if you where in the "Manufacturer" field.

CALLING UP THE QUICK ENTRY LIST

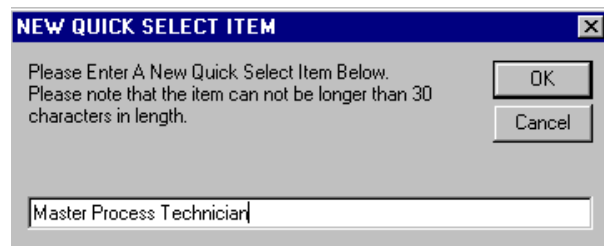
To call up the Data Quick Entry list from one of the supported text input fields you must:

- Move to the text field that to uses the quick entry routines.
- Now double mouse click in the field to bring up the screen.

- On some screens you can also click on the command button of three periods (...) to bring up the quick entry screen. This ... command button will be found to the left of the entry field.

ADDING NEW QUICK ENTRY ITEMS

Before you can begin using the Quick Entry option, you'll need to add information into the listing, once entered this information will be available for insertion.



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

- Press or click on the NEW command button on the Quick Entry screen.
- Type in the information you want included in the listing. This text can be any combination of text characters and numbers.
- Press or click on the OK command button to save the text, and add it to the list box.

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 at the current cursor location is as follows:

- Place your cursor into the text box that you want the information inserted into.
- Double click in the field to bring up the Quick Entry screen.
- Move to the list box and highlight the text of your choice.
- Press ENTER, or click on the SELECT command button to insert the highlighted text at the current cursor location.

DELETING ITEMS 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:

- Double click in the field to bring up the Quick Entry screen.
- Move into the list box and highlight the text you wish to delete.
- Move to and click on the DELETE command button to delete the text from the list.

Using the Calendar

Throughout the program and its modules, we have made use of a pop up calendar for the input of dates. This calendar is normally accessible by clicking on the ... button located to the right of that field.



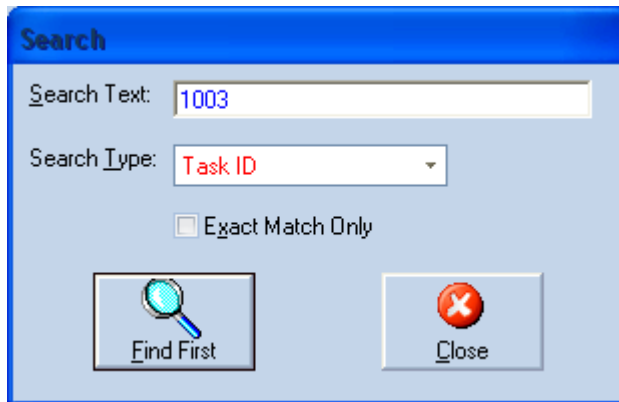
The use of this calendar is the same, no matter where it is accessed and will be explained next:

- To select a date click on the date of your choice, a box should appear around the date showing it is indeed selected.
- To move backwards one month at a time click on the command button with < on it.
- To move backwards two months at a time click on the command button with << on it.
- To move forward one month at a time, click on the button with > on it.
- To move forward two months at a time, click on the button with >> on it.
- To move back by one year, click the <Year button.
- To move forward by one year, click the Year> button.

- To move to a specific month, open the *Months* menu and select the appropriate option.
- To move to today's date move to and click on the *Today* button.
- To insert the selected date into the selected input field. move to and click on the *Select Date* button.
- To exit the *Calendar* without selecting a date, move to and click on the *Close Calendar* button.

Search and Find

The Find record method has been designed to look and work the same no matter which module you are accessing. The procedures are the same only the effected database fields are different.



To find a record using the built in search routine:

- Move to and click on the *Find* icon within the toolbar or press the *Ctrl* key and the *F* key at the same time.
- Move to the *Search Text* field and enter your search criteria. Wild cards are not acceptable.
- Move to the *Search Type* drop down list and select which database field you would like to conduct the search in. Options here will change depending on the module you are currently in.
- To only find records with an exact match, place a check in the *Exact Match Only* checkbox. Otherwise wild card characters will be used in the search criteria.
- Move to and click on the *FIND FIRST* command button.
- To continue a search for other matching records, click on the *Find Next* icon in the toolbar, or press the *F3* function key on your keyboard.

Picture Viewer

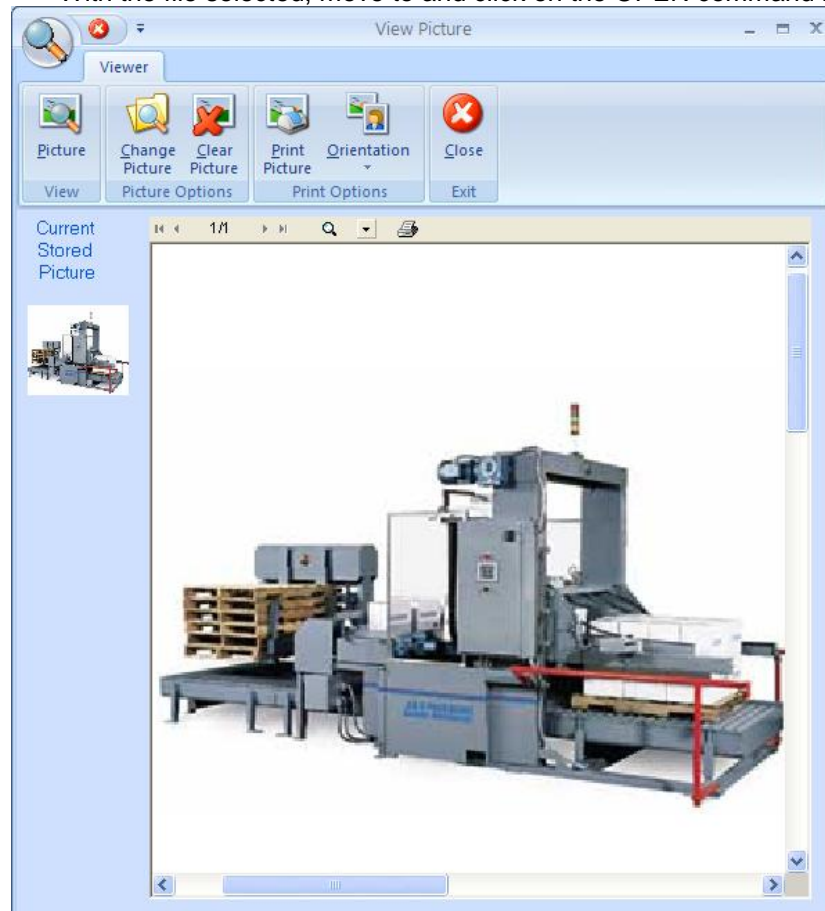
The *Picture Viewer* is used by the application insert images into your database, view existing images or pictures, and send a copy of the image to a picture.

TO VIEW A EXISTING PICTURE

- Open the *Picture Viewer* and then click the VIEW PICTURE command button.

TO INSERT OF CHANGE THE INSTALLED PICTURE

- Open the *Picture Viewer* and then click the BROWSE command button.
- Use this *File Open* dialog to locate the image or picture file you want to use.
- With the file selected, move to and click on the OPEN command button.



TO PRINT AN EXISTING PICTURE

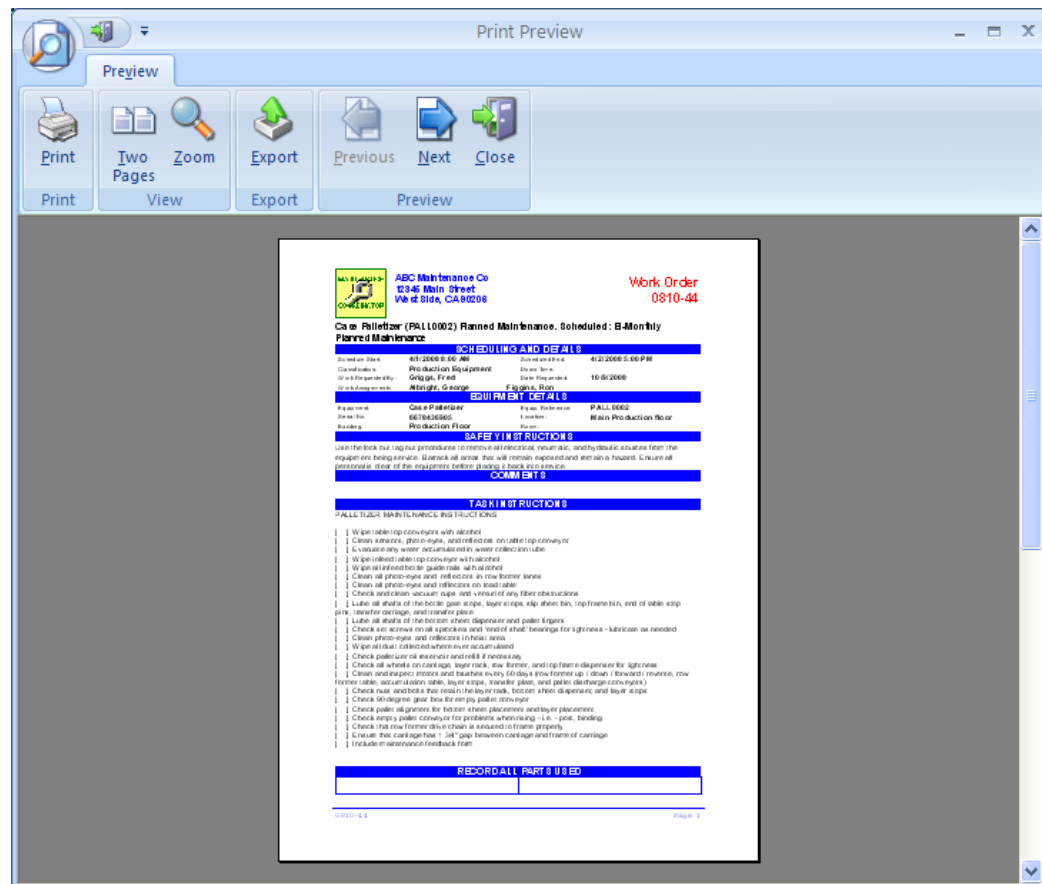
- Open the *Picture Viewer* and then click the PRINT command button

TO CLEAR AN EXISTING PICTURE

- Open the *Picture Viewer* and then click the CLEAR PICTURE command button.

Print Preview or Report Screen

The print preview screen is used just about everywhere throughout the program. It is used to preview a document prior to printing, and allows documents to be exported to file, and used by other applications.



There are actually a couple of different print preview screens used by the PM Coordinator system, but we have tried to design them so they look and feel the same. This way as you learn one, you learn them all.

When available, the following elements are found in the top toolbar of a *Print Preview* screen.

- *Previous* - Moves you through your print preview document from the current page towards the beginning.
- *Next* - Moves you through your print preview document from the current page towards the last page.
- *Zoom* – Zooms in and out on the preview document.
- *Export* – When present open a *Save As* dialog and allows you to save a copy of the report or document to file. It can then be opened by other supported applications.
- *2 Pages / 1 Page* – Toggles the preview to showing one or two pages. Only works when the program is more that 1 page in length.
- *Close* – When available, closes the preview screen. If this button is not available click the *ESC* key to close the screen.

Program Settings

There are a few setting that you can setup that effect the program both locally and globally. Some of the local settings include setting the application colors and grid/tree view options, and work order notifications. Some of the global settings include the next work order number to use and the days in advance to generate new work orders.

To access the program settings dialog:

- Ensure all modules are closed, such as when first starting the application.
- Open the *File* menu and select the *Program Settings* option.
- The *Program Settings* dialog will load.

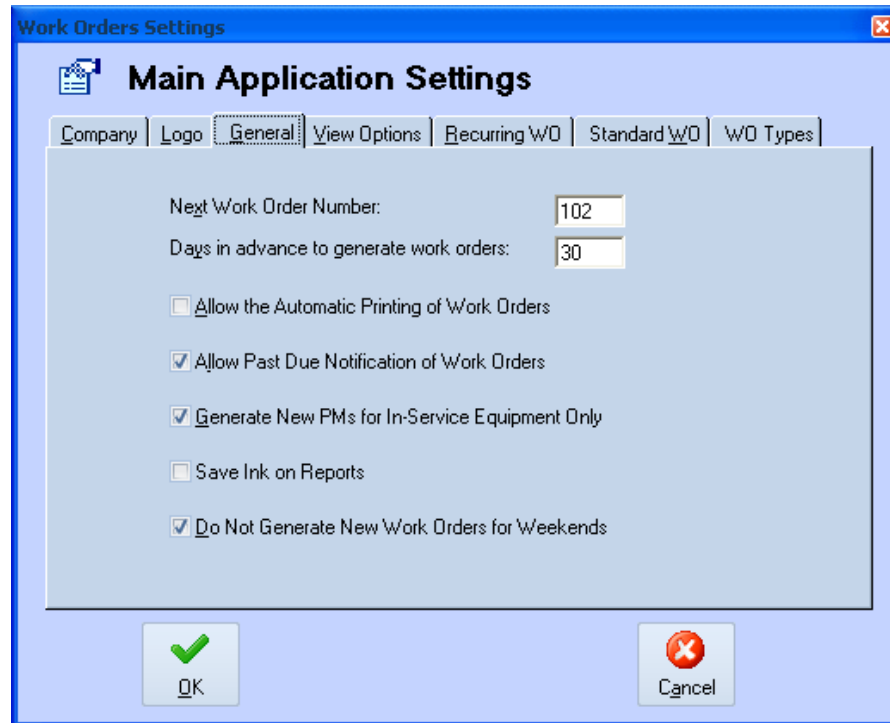
COMPANY INFORMATION AND LOGO

To setup your company information and logo:

- Click on the *Company* tab.
- Move the *Company Information* section and enter the appropriate information for the fields found there.
- Click the *Logo* tab.
- Move to the *Company Logo* section and click on the *Browse* button.
- Browse to and select the graphic you want to use for your logo and click *Open*.

The company logo accepts square bitmap images that display on the printed document in appropriate 7/8" x 7/8" size. If you logo does not display well in this size we suggest editing the logo with a graphic editor program such as Paint which is found as part of Windows.

GENENERAL OPTIONS



The settings on this tab deal with the followings:

- *Next Work Order Number* – Sets the next work order number to be used by the system
- *Days in Advance to Generate Work Orders* – This tells the system how many days in advance that new PMs should be created.
- *Allows the Automatic Printing of Work Orders* – A check here will allow a pop up to prompt you that there are work orders due for today, and allow you to print them.
- *Allow Past Due Notification of Work Orders* – A check here will a notification to be given about past due work orders when opening the Scheduler.
- *Generate New PMs for In-Service Equipment Only* – A check here will prevent new work orders from being created for equipment not in-service.
- *Save Ink on Reports* – A check here turns on ink saving features

- *Do Not Generate New Work Orders for Weekends* – A check here prevents the automatic generation of new work orders to be scheduled for weekends.

GRAPHICAL THEME

PM Coordinator supports various visual color themes that affect the overall appearance of the application and its modules. These themes were included to let you match the settings of your favorite color combinations. Please note that not all the included themes will render themselves the same on all operating systems and configurations. Play with the different options until you find the one that works and looks the best to you.

To setup the Graphical Theme:

- Click on the *View Options* tab
- Move to the *Graphical Theme* drop down and select the graphical theme of your choice.
- Restart the application to view the new graphical effects

Table and Tree View Options

The Scheduler module can have only a table showing on the *Lookup View* tab, only a classifications tree showing or both. If you use classifications for your work orders, the tree view will group all your work orders by these classifications, expediting work order lookup.

To setup these features:

- From the *Program Settings* dialog, move to the *View Options* tab by clicking on it.
- Move to the *Scheduler Table View Options* section and select the view option of your choice. Repeat the above step for the *Work Orders Module*.

Recurring WO

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 prevents the item from printing.

Standard WO

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

Work Order Types

The *WO Types* tab allows you to customize the names used by the work orders. The top 3 work order types are recurring types of work orders, and the bottom 4 are single shot, or repair types of work orders. All of these titles can be changed by the user except the Planned Maintenance and Standard Work Order types.

To change or setup the work order types names:

- Move to the various fields on this tab and edit the name to whatever you want.

The flags displayed here indicates the legend used within the tree view control of the Scheduler's Lookup View tab.

MAINTENANCE SCHEDULER

Overview

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 single shot, or repair types of work orders.

RECURRING TYPES:

- Full Planned Maintenance - This task indicator specifies a full-blown planned maintenance type task.
- Mini Planned Maintenance - This type of task would indicate a mini PM, such as a full PM that has been cut down into 2 or smaller tasks to allow for less continuous machine downtime. This is a user defined type.
- Planned Change Over - This type of task would indicate a planned changeover of a machine's setup. This could be to run a different product for example. This is a user defined type.

The screenshot displays the PM Coordinator Maintenance Scheduler interface. At the top, there is a navigation bar with tabs: Home, Work Orders, Instructions, Filters, Reports, and Options. Below this is a toolbar with various icons for actions like Generate Tasks, Generate by Classes, Copy, Paste, Cut, Delete, Add New Record, Post/Save Changes, Delete Record, Print Record, Preview Record, Find First, Find Next, and Find Next. The main area is divided into several sections. The 'Task Description' section shows 'Case Palletizer (PALL0002) Planned Maintenance. Scheduled: Bi-Monthly' and 'Task ID: 1111-88'. Below this are four tabs: Lookup, Details, Instructions, and Status. The 'Details' tab is active, showing fields for Task Type (Planned Maintenance), Task Priority, Personnel Assignments (Albright, George; Figgins, Ron), Scheduling (Date: 11/16/2011, Scheduled Start: 12/26/2012, Scheduled End: 12/28/2012, Start Time: 8:00 AM, Ending Time: 5:00 PM), Work Requested By (Griggs, Fred), Recurring Setup (Frequency: Bi-Monthly, Every XXX Criteria: 0, Generate New When Done, Do Not Generate New Task), Machine Assignment (Case Palletizer, PALL0002), Classification Assignment (Color Scheme: 1674448, Production Equipment), Account Assignment, Project Assignment, and Labor Assignments (Edit Work Order Labor).

REPAIR, SINGLE-SHOT TYPES:

- Imminent Danger (User Definable)
- Safety Hazard (User Definable)
- Safety Concern (User Definable)
- Standard Work Orders (User Definable)

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

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

Work Order Creation Wizard

In this section we will create a new work order and at the same time explain the use of the *Work Orders Creation Wizard*. The *Work Order Creation Wizard* is used in various parts of this module, and follows the same guidelines no matter where used.

1. Click on the *Module* button and select the *Add New* option, or click *Add New Record* option in the ribbon.
2. Next you're asked if you would like to use the *Work Order wizard*, answer yes. A no answer would create a new record for you, which you would have to edit directly without the use of the wizard.
3. When the wizard loads you will be placed on the *Task ID* tab. Move to the *Task Description* field and type in a brief description of your task. Something like "Monthly PM of Compressor 1 Control Panel" maybe appropriate here. This field will accept up to 100 characters.
4. The *Task ID* field has already been filled in for you. You have the option of changing this if you would like. Click *Next*.
5. Now you should be on the *Task Type* tab. Move to and select the task type assignment of your choice here. You have 3 planned maintenance types (normally recurring), and 4 standard work order types (normally single shot tasks). For this exercise click the *Full Planned Maintenance Type Task* option.
6. Click *Next*
7. You should now be on the *Scheduling* tab. Click on the ... command button adjacent to the *Scheduled Start* field.

8. Select the date you want to start working on this task from within the pop up calendar. First clicking on the date and then the *Select Date* command button does this.
9. Repeat the above step for the date you expect to be done with this task.
10. Move to the *Start Time* drop down list and select an appropriate time to commence this work.
11. Repeat the above step for the *Ending Time*.
12. Click *Next*.
13. You should now be on the *Recurring* tab. Move to the *Frequency* drop down list and select an appropriate frequency indicator for this task. Since we named this task as a “Month PM” we have a couple of legitimate choices here. We could choose *Monthly* or *Every XX Weeks*. For this example click on the *Every XX Weeks* text.

The screenshot shows the 'Work Order Wizard' window with the 'Recurring' tab selected. The 'Recurring Setup' section contains a 'Frequency' dropdown menu set to 'Bi-Monthly', an 'Every XX Criteria' text box, and two checkboxes: 'Generate New When Done' (unchecked) and 'Do Not Generate New Task' (checked). To the right of these controls, red text provides instructions: 'For a recurring type task, the value here indicates how often this task should be regenerated by the application.' and 'Change the value by selecting a new value from the drop down list.' The top of the window features a 'Wizard' toolbar with buttons for 'Save and Close', 'Paste', 'Copy', 'Cut', 'Delete', 'Previous', 'Next', 'Cancel and Close', and 'Exit'. Below the toolbar are tabs for 'Personnel', 'Assignments', 'Instructions', 'Task I.D.', 'Task Type', 'Scheduling', and 'Recurring'.

14. Move to the *Every XX Criteria* text box and type in the number 4. This task is now setup to regenerate itself every 4 weeks.
15. Placing a check in the *Do Not Generate A New Task* check box will prevent the application from regenerating this task. The program places a check here automatically once a new task has been generated.
16. Placing a check in the *Generate New When Done* checkbox will prevent the program from regenerating this task until it has been marked as completed.
17. Click *Next* to move to the *Personnel* tab.

18. Move to and click on the ... command button adjacent to the first field in the *Personnel* section.
19. Select the mechanic you want to assign to this work order from one of those listed. You select the mechanic by clicking on them from within the grid.
20. Click the *Select* command button.
21. Repeat the above two steps for the next *Personnel* assignment, if you wish to make more than one, that is.

The screenshot shows the 'Work Order Wizard' application window. The 'Assignments' tab is active, displaying three assignment sections: 'Machine Assignment' (Case Palletizer), 'Classification Assignment' (Production Equipment), and 'Work Requested By' (Griggs, Fred). Each section includes a dropdown menu and a selection button (indicated by three dots).

22. Click the *Next* command button to move to the *Assignments* tab.
23. Click on the ... command button within the *Machine Assignment* section.
24. Click on the machine description that you want this work order to be assign to from within the grid.
25. Click the *Select* command button.
26. Click the ... command button within the *Classification Assignment* section.
27. Click on the description of the class that you want to use from those within the list. Classifications are much like user-defined fields. They can group your tasks by productions lines, buildings, clients, or anything that makes sense to your organization.
28. Click the *Select* command button.

29. Click on the ... command button in the *Work Requested By* section.
30. Click on the person who is requesting this work to be done from those within the list.
31. Click the *Select* button.
32. Click the *Next* button to move to the *Instructions* tab.
33. Click the *Lookup* button in the *Safety Instructions* section.
34. Click the safety instructions you want to use with this work order from those listed within the grid.
35. Click the *Accept* command button.
36. Repeat the above steps for the *Planned Maintenance Instructions*.
37. Click the *Finish* command button and you have just created a PM type work order.

Creating a New Work Order

To create a new work order:

- Click on the *Module* button and select the *Add New* option, or click *Add New Record* option in the ribbon.
- When asked if want to use the *Work Orders Creation* wizard, click *Yes* to use the Wizard, or click *No* to create the work order the standard way.
- If you choose *No* then a new blank record will be created for you. Move to the *Task Description* area and type in a description for this task. This field is located between the bottom toolbar and just above the tabs. Something like “Bi-Annual water tower maintenance” maybe appropriate here. This field will accept up to 100 characters.
- Change or edit the Task ID field if you do not want to accept the default.
- Move through the various tabs and setup the appropriate information. The task will be automatically saved to the database for you.

Please refer to the discussions on *Understanding the Scheduler Tabs* for explanations on how to setup each available option.

Checking the Task ID Number

This field, found in the upper part of the screen should contain a unique identifier for each different task in the database. We did not however make this a mandatory rule as everyone has their own way of doing things. You can however verify if the identifier you've entered is unique to the database.

To test to see if your identifier is unique:

- Enter your *Task ID* in the space provided.
- Move to and click on the *Check* button adjacent to this field. The program will then inform you as to whether a matching identifier was found.

Understanding the Scheduler Tabs

In this section we will explore each tab of the Maintenance Scheduler module and discuss the function of each element on that tab.

Lookup View

This tab helps in locating tasks by grouping and sorting work orders. All the tasks in the current sort are located here. To select a task and make it active the user needs only to click on the task from within the grid. Once selected the user can click on the other tabs to view or edit the task itself.

PM Coordinator - [Maintenance Scheduler]

Options Go Databases Tools Help

PM Coordinator

Scheduler

Options

- Generate Tasks
- Report Wizard
- Complete Work Order

Work Order Resources

- Add or Edit Task Labor

Instructions

- Edit Safety Instructions
- Edit Task Instructions
- Add Safety Instructions
- Add Task Instructions

Scheduler

- Work Orders
- Tasks Planner
- Equipment

Maintenance Scheduler

Home Work Orders Instructions Filters Reports Options

Generate Tasks Generate by Classes Generate Work Orders

Paste Cut X Delete

Clipboard

Add New Record Post/Save Changes Delete Record

Records

Print Record Print Preview Record

Print

Find First Find Next

Search

Task Description: High Pressure Air Compressor (HIGH00001) Planned Maintenance. Scheduled: Semi-Annually Task ID: 0709-40

Lookup Details Instructions Status

Sort By: Reference ID Types: Planned Maint. Status: All Open Start Date: 8/19/2009 Refresh

#	Task ID	Description	Created	Start	End
1	0709-40	High Pressure Air	09/10/2007	12/11/2007	01/08/2008
2	0711-43	Case Palletizer (F	11/12/2007	02/01/2008	02/02/2008
3	0810-44	Case Palletizer (F	10/09/2008	04/01/2008	04/02/2008
4	0810-45	Case Palletizer (F	10/14/2008	06/01/2008	06/02/2008
5	0810-46	Case Palletizer (F	10/14/2008	08/01/2008	08/02/2008
6	0810-47	Case Palletizer (F	10/15/2008	10/01/2008	10/02/2008
7	0810-48	Case Palletizer (F	10/16/2008	12/01/2008	12/02/2008
8	0811-49	Case Palletizer (F	11/04/2008	02/01/2009	02/02/2009
9	0811-50	High Pressure Air	11/17/2008	11/24/2008	11/28/2008
10	0901-51	Case Palletizer (F	01/13/2009	04/01/2009	04/02/2009
11	0907-52	High Pressure Air	07/20/2009	06/11/2008	07/09/2008
12	0907-53	High Pressure Air	07/20/2009	05/25/2009	05/29/2009
13	0907-54	Case Palletizer (F	07/20/2009	06/01/2009	06/02/2009
14	0907-55	High Pressure Air	07/20/2009	12/11/2008	01/08/2009
15	0907-56	High Pressure Air	07/20/2009	06/11/2009	07/09/2009
16	0907-58	Case Palletizer (F	07/20/2009	08/03/2009	08/04/2009

Monday, July 20, 2009 15:16

When the *Classification Tree* is displayed, you can also select a work order by first clicking on the folder icon that contains the work order and then clicking on the work order itself. Using *Classification Assignments* and the *Classes Tree* can help streamline item lookup.

Sorting and Filtering the Database

You have a couple of sort and filtering options available to help you better manage the tasks or work orders found on the *Lookup* tab.

A screenshot of a software interface for sorting and filtering data. It features four dropdown menus: 'Sort By:' with 'Start Date' selected, 'Types:' with 'Planned Main' selected, 'Status:' with 'All Open' selected, and 'Start Date:' with '12/5/2001' selected. To the right of the 'Start Date' dropdown is an ellipsis button (...). To the far right is a 'Refresh' button.

To setup the sort and filtering options:

- From the *Table View* tab, select how you would like the database sorted by selecting one of the sort options found in the *Sort By* drop down list. Options found here are *Description*, *Reference ID*, *Start Date* and *Classification*.
- Select what type of work orders you want to include in the sort by selecting one of the options in the *Types* drop down list. Options here include *All Types*, *Planned Maint.* (Planned Maintenance), and *Standard WO* (Standard Work Orders)
- Next select the status indicator that best describes the type of tasks you want to view. Selecting a description from the *Status* drop down list performs this function.
- Move to the *Start Date* field and click on the ... command button to bring up a calendar. Select a date from within this calendar. All tasks that meet the other criteria you just setup, and have a scheduled starting on or before this date will be included in the sort.
- Once all the criteria above have been set, move to and click on the *Refresh* command button. This will cause the database to be resorted by the criteria you have setup.

NOTE: After changing the setup to hide or display the grid and classes tree functions, clicking the *Refresh* button will force these new display options to take effect.

Details Tab

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

The screenshot displays the PM Coordinator software interface with the 'Details' tab selected. The top navigation bar includes 'Home', 'Work Orders', 'Instructions', 'Filters', and 'Reports'. Below this is a toolbar with various icons for generating work orders, clipboard operations, adding new records, saving changes, deleting records, printing, and searching. The main area is divided into several sections: 'Task Description' at the top with a text field containing 'Case Palletizer (PALL0002) Planned Maintenance. Scheduled: Bi-Monthly' and a 'Task ID' field with '1111-88'. Below this are four tabs: 'Lookup', 'Details' (selected), 'Instructions', and 'Status'. The 'Details' tab contains several sub-sections: 'Task Type' with a dropdown set to 'Planned Maintenance' and a 'Task Priority' dropdown; 'Personnel Assignments' with a list showing 'Albright, George' and 'Figgins, Ron'; 'Scheduling' with fields for 'Date' (11/16/2011), 'Scheduled Start' (12/26/2012), 'Scheduled End' (12/28/2012), 'Start Time' (8:00 AM), and 'Ending Time' (5:00 PM); 'Recurring Setup' with a 'Frequency' dropdown set to 'Bi-Monthly', 'Every XXX Criteria' set to '0', and checkboxes for 'Generate New When Done' and 'Do Not Generate New Task'; 'Machine Assignment' with a list showing 'Case Palletizer' and 'PALL0002'; 'Work Requested By' with a text field containing 'Griggs, Fred'; 'Assignments' and 'Attachments' tabs at the bottom; 'Classification Assignment' with a 'Color Scheme' field set to '16744448' and a dropdown set to 'Production Equipment'; 'Account Assignment' and 'Project Assignment' fields; and a 'Labor Assignments' section with an 'Edit Work Order Labor' button.

Task Types

When creating or editing a task setup, this area allows for the specification of the task type. You can change or assign different task types by clicking on the proper task type description from the pull down list. The available task type assignments are:

- *Full - Planned Maintenance* - This assigns the task as a PM type task. In general practice this task would be a recurring type task for a planned maintenance procedure to be completed. Such a task could be a 50,000-mile

tune-up on an automobile, for example, or perhaps a compressor maintenance procedure that needs to be performed.

- *Mini - Planned Maintenance* - This type is a user defined type.
- *Planned Change Over* - This type is a user defined type.
- *Safety - Imminent Danger* - This type is a user defined type.
- *Safety - Safety Hazard* - This type is a user defined type.
- *Safety - Safety Concern* - This type is a user defined type.
- *Standard Work Orders* - This is your normal (repair) work order. Examples could be a door that needs painted, pictures hung, etc.
- *Task Priority* - This allows you to edit the priority assignment given to the selected task.

Personnel Assignments

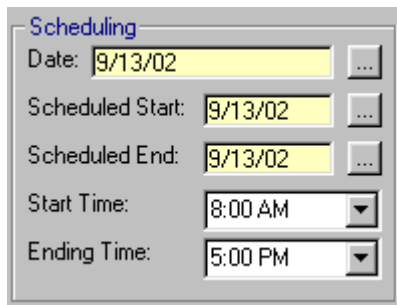
This section allows for the assignments up to three mechanics or employees to this task. To make your personnel assignment:

- Click on the ... command button adjacent the assignment field you want to use.
- Select the mechanic from the displayed grid by clicking on them.
- Click the *Select* button.
- Next you're prompted as to whether you would like to add the resource to the *labor list also*. If you would like to track the labor costs of this person, click on the *OK* button.
- Repeat the above steps for any additional assignment you wish to make, up to a total of three.

Please note that these 3 assignments are also used for the Auto-Email of work orders which will be outlined later.

Scheduling

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



- Move to the *Scheduling* section.
- *Date Scheduled* - This area specifies the date that this task was first scheduled. You can change the date here by clicking the ... button adjacent to this field, then selecting the new date from within the popup calendar.
- *Schedule Start* - This field specifies the date in which work should commence on the task. Change this date by clicking on the ... button adjacent to this field with your left mouse button.
- *Schedule End* - This field should indicate the date you expect the work on the task to be completed. Change this date by clicking on the ... button adjacent to this field with your left mouse button.
- *Start Time* - This field should show the scheduled starting time of the task. Change this time by clicking on the arrow and selecting a new time from within the list.
- *Ending Time* - This field should indicate the expected ending time of the task.

Work Requested By

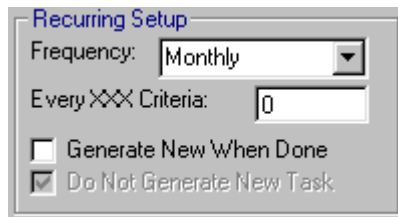
To specify who requested this work:

- Type in the name of the person in the box provided, or.
- Click the ... command button adjacent to the text box.
- Select the name of the person by clicking on it from the installed list.
- Click the *Select* button.

Recurring Tasks

The section allows the setup of repeating type of criteria for work orders of the recurring types. These include Planned Maintenance, Mini-PM, and Change-Over types. *Like the Scheduling section, this information does not require manual setup if the task has assigned to a PM group.*

- Move to the *Recurring Setup* section.
- *Frequency* - This drop down list setups the recurring frequency of the task. Options available here are: *None, Every XX Days, Daily, Daily - No Weekends, Weekly, Every XX Weeks, Bi-Weekly, Monthly, Every XX Months, Bi-Monthly, Quarterly, Semi-Annually, Annually, Every XX Units.*
- *Every XX Criteria* - Information typed here would work in association with the following Frequency selections, and would replace the XX portion of that selection: *Every XX Days, Every XX Weeks, and Every XX Months.*
- *Generate New When Done* – Placing a checkmark here prevents the program from generating new tasks until this one has been marked completed. If left unchecked the program will generate new tasks by whatever other criteria is setup, regardless if the previous task has been completed or not.
- *Do Not Generate A New Task* - When a check is placed here the program will not generate a new task for the selected task even if a recurring frequency has been set up. The program itself places a check here right after a new task has been created. This is done to prevent the program from repeatedly generating the same task over and over again.



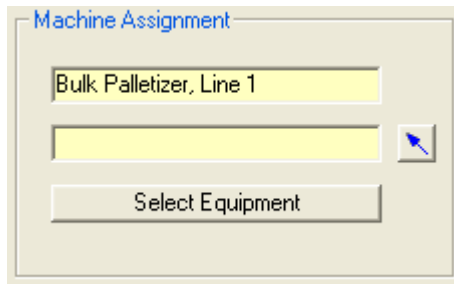
The screenshot shows a dialog box titled "Recurring Setup". It contains the following elements:

- A "Frequency:" label followed by a dropdown menu currently showing "Monthly".
- An "Every XX Criteria:" label followed by a text input box containing the number "0".
- Two checkboxes:
 - "Generate New When Done" which is unchecked.
 - "Do Not Generate New Task" which is checked.

To setup recurring criteria:

- Move to the *Frequency* drop down list and select the recurring criteria you want to assign to this task by clicking on it.
- If necessary, move to the *Every XX Criteria* box and type in the appropriate interval here.
- If you want to have the program wait until this task is completed before generating a new task, place a checkmark in the *Generate New When Done* checkbox.
- To toggle the value of the *Do Not Generate New Task* checkbox open the *File* menu and select the *Change Do Not Generate New Task* option.

Machine or Equipment Assignment



This section allows you to assign the task or work or to a piece of equipment. This helps in identifying the equipment to be serviced, along with building a history database on that equipment.

To assign a machine to this task:

- Move to the *Machine Assignment* section and click on the *Select Equipment* command button.
- Click on the machine you want to use from the displayed grid.
- Click *Select*.

Classification Assignments

Classifications are much like a user defined field and should be used in such a way that makes the most sense to your organization. Valid classifications could describe a production line, property, building, a client, or any other way you would like to group your work orders. Classifications or classes help group tasks for reporting and viewing purposes.

To assign a classification to the task:

- Click on the *Assignments* tab located near the bottom on the screen.
- Move to the *Classification Assignment* section and click on the... button.
- Select the class you want to use from within the list by clicking on it.
- Click *Select*.

Specifying Account and Project Assignments

You can assign Account and Project Assignment to work orders. This comes in handy with reports and other related information.

To specify Account or Projects:

- Click on the *Assignments* tab located near the bottom on the screen.
- Move to and click on the ... button adjacent to the field you want to make an assignment to.
- Select the assignment for this Quick Entry type dialog box.
- Click on the *Select* button.

Assigning Labor to a Work Order

You can assign as many mechanics as needed to a work order. The mechanics assigned here differ from the three possible assignments made in the *Personnel Assignments* section. The resources here will be used in the calculation of the total work order cost, whereas the others only appear on the work orders themselves and used for the Auto-Email feature.

Adding Labor

To add labor or resources to a task:

- Move to the *Details* tab by clicking on it.
- Click on the *Assignments* tab near the bottom of the screen.
- Click on the *Edit Work Orders Labor* button.
- Click *Add Mechanic*.
- Click on the resource you want to add by clicking on them from within the grid.
- Click *Select*.
- Repeat the above steps for each additional resource you want to add.

Note: You can check to see if the mechanic is available to perform the task by clicking on the *Schedule* tab of the Employees lookup screen.

Removing Labor

To remove a resource from a task:

- Move to the *Details* tab by clicking on it.
- Click on the *Assignments* tab near the bottom of the screen.
- Click on the *Edit Work Orders Labor* button.
- Move to the displayed grid, and click on the resource you wish to remove.
- Click *Remove Mechanic*.
- Answer *Yes* to the prompt about removing the resource.

Recording Labor Actually Work

To record the time your labor actually worked on the completion of a task:

- Move to the *Details* tab by clicking on it.
- Click on the *Assignments* tab near the bottom of the screen.
- Click on the *Edit Work Orders Labor* button.
- Move to the displayed grid, and click on the resource you wish to record the information on.
- Click in the *Enter Actual Time Worked* field to select it.
- Enter the actual time the selected resource worked on the completion of the task.
- Repeat the above steps for all resources that apply.

Work Order Attachments

This feature allows you to attach items to work orders. Basically any type of document, or path that can be accessed by the Windows, Start – Run option can be used. Normally you just point to a file, and when opened that file will open itself along with the appropriate 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.

To attach a file to a work orders:

- Moving to the *Detail View*.

- Click on the *Attachments* tab located near the bottom on the screen.
- Click the *Add New* button.
- From the invoked dialog click on the *Browse* button to located and point to the file you want to attach. Click the *Open* button.
- Type in a description for this attachment and click on the *Accept* button.

To view an attached file:

- Click on the *Attach* tab located near the bottom on the screen of the *Details* view.
- Select the attachment you want to open from those listed.
- Click on the *Open* button adjacent to the file you want to open.

Instructions Tab

The items found on the Instructions tab allow you to setup task instructions for both normal and recurring type work orders. You can also set up the safety instructions to be included, along with task comments.

The screenshot displays the PM Coordinator software interface with the 'Instructions' tab selected. The top menu bar includes 'Home', 'Work Orders', 'Instructions', 'Filters', and 'Reports'. Below the menu is a toolbar with various icons for generating tasks, clipboard operations, adding new records, saving changes, deleting records, printing, and searching. The main area shows the 'Task Description' as 'Case Palletizer (PALL0002) Planned Maintenance. Scheduled: Bi-Monthly' and the 'Task ID' as '1111-88'. The 'Instructions' tab is active, showing three sections: 'Task Instructions for Planned Maintenance Type Tasks' with three rows of 'Lookup', 'Edit', 'New', and 'Clear' buttons; 'Safety Instructions' with one row of 'Lookup', 'Edit', 'New', and 'Clear' buttons; and 'Comments for PMs - Task Instructions for Standard Work Orders' with a large text area and a 'REC' button.

Task Instructions

This section allows you to select and setup instructions for recurring type tasks. These tasks would be where you could use the same set of instructions for a variety of machines. For example, let's say you have various production lines that use the same type of gearboxes. Instead of writing separate instructions for each gearbox, or lines, you would just reuse the same instructions over and over. This makes task setups easier, and at the same time reduces database size.

To select instructions:

- Click on the *Lookup* button.
- Highlight the instruction's description from within the list by clicking on it.
- Click the *Select* button.

You can setup three sets of instructions for any given task. This can be useful when you wish to schedule separate tasks that need completion at the same time, such as grouping a weekly, monthly, and quarterly PM together.

The *Edit* buttons found in this section allows you to edit the instructions that are assigned to this task.

The *New* command buttons found in this section allows you to create a new set of instructions for use with the current task.

Safety Instructions

This section allows you to specify the safety instructions to be used by this task. This section works exactly the same way as the Task Instructions just discussed. The difference however is that you can include only one set of safety instruction per task.

Comments for PMs – Task Instructions for Standard Work Orders

This section when used with PMs and Change Over type tasks is used to add comments to the work orders. These comments could be almost anything in nature, such as special instructions or precautions.

This section, when dealing with both Safety and Standard type of work orders is used as a "Work to Be Performed and Why" field. This is where you would explain the work that needs to be performed, and why it should be done.

To enter information:

- Move to the *Comments for PMs – Task Instructions for Standard Work Orders* field by clicking in it.
- Type in the appropriate information.

Status Tab

On the *Status* tab you can record the current status of the selected work order, record completion information, and record the costs occurred performing the task.

The screenshot displays the PM Coordinator software interface. The top navigation bar includes tabs for Home, Work Orders, Instructions, Filters, and Reports. Below this is a toolbar with icons for Work Requests, Default Sort, Custom Sort Wizard, Show All Work Orders, Past Due, Open All Dates, Not Re-Generated, With Current Description, Mechanics, and Equipment. The main content area shows the 'Status' tab selected. The 'Task Description' field contains 'High Pressure Air Compressor (HIGH00001) Planned Maintenance. Scheduled: Every 4 Weeks' and the 'Task ID' is '1204-96'. The 'Status' tab is divided into several sections: 'Completion Information' with fields for Date Completed (4/19/2012), Completed By (Griqas, Fred), Inspected By, Time Down (Hrs/Mins), and Meter Value (0); 'Task Status' with a Current Status dropdown set to 'Completed'; 'Costs' section with input fields for Total Labor Costs, Total Material Costs, Contractor - Vendor Cost, Taxes, Other Costs, and Total Costs, along with a 'Calculate' button; and 'Completion Notes - Delays' with a large text area and an 'Assign Code' button. The 'Repair Code' section is also visible with an 'Assign Code' button.

Completion Information

Use this section to record information about the completion of the currently selected task.

To record completion information:

- Move to the *Completion Information* section and click on the ... command button adjacent to the *Date Completed* field.
- Select the date that the task was completed from within the popup calendar and click on *Select Date*.
- Click on the ... button adjacent to the *Completed By* field.
- Click on the name of the person to be credited for completing this task from within the displayed grid.
- Click *Select*.
- Click on the ... command button next to the *Inspected By* field.
- Click on the name of the person who inspected the completion of this task from the displayed grid.
- Click *Select*.
- Move to the *Down Time* section and record how many hours and minutes the equipment was down for the completion of this work order.
- To retrieve the current Equipment Meter reading at time of completion, click the *Retrieve Current* button.

Note: When closing a work order for task completion, don't forget to set the status of that task. You may also want to record the activity in the machine history records. Clicking on the *History* button does this for you.

Task Status

Use this section to indicate the current status of the work order or task. You set this status by selecting one of the options from the drop down list box. Available options are as follows:

- Ready - This status would indicate that the task is ready to be performed. You may only be waiting for the time and resources to do it.
- On Hold - This status would indicate that the task has been put on hold for one reason or another. One of the most common On Hold reasons could be something like "Waiting on Parts".
- Completed - This status would indicate that the task has been completed. It will be removed from the normal sort routines, or in other words, it will appear invisible when you first open this module.
- Cancelled - This status description would indicate that the task could not be performed. This could be because of production demands, a duplicate work

order, etc. Setting a task with this status is not the same as deleting the task, as the task still resides in the database.

- WO Request – This type of a status would indicate a task that someone has requested to be done, but still needs approval by the administrator.

To change the status of your work order:

- Move to the *Task Status* section and select the appropriate indicator from the drop down list by clicking on it.

Costs

This section will assist you in calculating the total costs involved with the completion of this work order. This is used in reports and can also assist you in charging clients, when such is applicable.

The cost of a work order is broken down into the following elements:

- Total Labor Costs – This refers to the labor setup on the *Labor* tab. Taken into consideration that each employee is assigned to the task, the hours they worked on the task, and their hourly rate of pay.
- Total Material Costs – Record material costs in this section
- Contractor – Vendor Costs – This is a manual entry, and would be the place to record any contracted costs occurred in the completion of this task.
- Taxes – This would be the place to record any taxes or permits that were paid in the completion of this task.
- Other Cost – This is the place you would record any other additional costs associated with the completion of this task.
- Total Costs – This is the sum of the amounts specified above, and would indicate the total cost of performing this work order.

To record and calculate the total cost of a work order:

- Completed the information on both the *Materials* tab and the *Labor* tab.
- Move to the *Contractor – Vendor Costs* text field and enter the appropriate amounts, if any.
- Repeat the above step for the *Taxes* and *Other Costs* fields.
- Click on the *Calculate Costs* command button.

Complete Button

With the *Complete Button* found on the *Status* tab, you can select the person who completed the task, mark the task as completed, update the tasks cost, and if a machine has been assigned, write the task to the Machine History log. The *Complete* button will perform all these task and more for you, to help streamline the closing of tasks or work orders.

To use the *Complete* button:

- Move to the *Status* tab by clicking on it.
- Click the *Complete* button.
- Setup or select the various options of this dialog.
- Click on the *OK* button.

Repair Codes

With repair you can have both universal repair codes, and machine specific repair 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 equipment 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.

To assign a Repair Code to a work order:

- Select the work order you want to assign the code to.
- If this is a machine specific type code, then also ensure the work order has a piece of equipment assigned to it.
- Click on the *Status* tab in the Scheduler.
- Click on *Assign Code* button near the bottom right hand corner of the screen.
- Select the code you want to use from within the list.
- Click on the *Select* button.

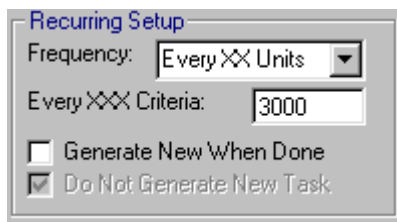
To add a new item to the list:

- Follow the above procedure up to the point of clicking on the *Assign Code* button.
- Click on the *Add New* option in the ribbon.

- Types in the new code in the space provided and click *OK*.
- When asked about adding to the global yes, reply with the appropriate answer.

Scheduling by Meter

With the scheduler module you can have new recurring tasks scheduled by meter, hours or odometer readings. This comes in handy for a variety of reasons such as scheduling equipment maintenance after so many hours or miles have past.



The image shows a 'Recurring Setup' dialog box. It has a 'Frequency' dropdown menu with 'Every XX Units' selected. Below it is an 'Every XXX Criteria' text box with the value '3000'. At the bottom, there are two checkboxes: 'Generate New When Done' (unchecked) and 'Do Not Generate New Task' (checked).

To schedule by meter:

- Move to the *Details* tab.
- Move to the *Recurring Setup* section.
- Select the recurring frequency of *Every XX units*.
- Move to the *Every XXX Criteria* text box and enter how often you would like this task to repeat. For example, you have an automobile that you want to change the oil every 3,000 miles. You would enter 3000 here (no commas).
- Now you need to setup when to perform the first task. Open the *File* menu and select the *Set Next Meter* option.
- Enter the appropriate value in the space provided and press enter. When the equipment meter value equals or exceeds this value, the work order will become due.

The *Generate New When Done* flag is always used when scheduling By Meter (the checkmark in the scheduler is ignored); this is to say that the following criteria must be satisfied for a “Meter Type Task” to generate a new work order.

- A piece of Equipment is assigned to a task.
- The Equipment current meter is greater than zero.
- The Recurring frequency for the current task must be setup to “Every XX Units”.
- A Value must be set for the “Every XXX Criteria”.
- The “Next Meter” has been set for the current work order or task.
- The previous task must be set as “Completed”.
- The “Do Not Generate New Task” flag has NOT been set.

When a new work order is created the new task will have a scheduled start date 2 years in advance of the date it was created. This is to prevent the task from showing up in the default sorts, 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 created:

- The previous task will have its “Do Not Generate New Task” flag set to true to prevent the task from regenerating itself multiple times.
- The program will add the current equipment meter reading to the value as setup in the “Every XXX Criteria” section, and use the result as the value to meet before the next work order becomes due.
- The program will copy the other information from the old task to the new one.
- The new task will have a scheduled start date 2 years in advance from the date the new task was created.

Entering Equipment Meters

Equipment meter or odometer readings are recorded in the Machinery and Equipment module and can also be recorded from the *Equipment* lookup screen.

Classification Assignments

With the task setup you can assign both planned maintenance, and standard work orders to Classification Assignments. This feature proves useful in grouping and reporting, where you can group reports by these classes.

Adding New Classifications

To setup new classifications:

- From the *Scheduler Details View* tab, click on the *Assignments* tab near the bottom of the screen.
- Move to the *Classification Assignment* section and click on the ... button.
- To create a new classification click *Add New*.
- Next a dialog screen will appear prompting you for the name of the new classification assignment. Type this information in the box provided. This field can contain any combination of text characters and numbers, and be a maximum length of 40 characters. Please note that the program will allow you

to type in more than this 40-character limit, but all-excess characters will be filtered out of the final description.

- Click *Ok*.
- Select the Classification Assignment you just created from those listed within the list box by clicking on it.
- Click the *Color Scheme* command button. This will allow you to assign a color scheme to the class.
- After the color picker screen appears, move to and click on the color of your choice to select it.
- Click on the *OK* command button to accept the color and assign it to the currently selected classification.
- Repeat the above steps for any addition classifications you wish to set up.
- To insert the selected classification into the currently selected task, move to and click on the *Select* command button.

Deleting Classification Assignments

To delete classification assignments:

- From the Scheduler *Details* tab, move to the *Classification Assignment* section and click on the ... command button.
- Move to the list box containing the descriptions of available classifications, and select the class you wish to remove by left mouse clicking on it.
- Click *Delete*.
- Click *Yes* to the prompt about deleting the classification.

Generating Tasks

Whenever the program executes one of the generate tasks routines it looks for tasks that meet the following criteria.

- A scheduled starting date that falls within the generating range, and/or falls behind today's date.
- The 'Do Not Generate New Task' flag has not been set.
- A recurring frequency has been setup.
- The task has been assigned as a Planned Maintenance, Mini-PM or Change Over type task.

- If turned on, the Equipment assigned to the task must also be marked as 'In-Service' within the Equipment module (this feature can be turned off from within the Work Orders Setup screen).
- If the 'Generate New When Done' option has been set, the task must also have a status of 'Completed' before a new task is created.

If all the above criteria have been satisfied the program will regenerate a new task for all tasks it finds. This includes both open tasks, and those that have already been closed.

When the module first loads, by default, it will look 30 days into the future, and generate all tasks that fall into this range. You can specify a new value under the Work Orders setup.

Printing and Generating Tasks

With the *Generate Tasks* option you can setup and print a date range of tasks. If the date range you specify contains tasks that have not already been generated by the program, the program will generate then as this routine is executed.

To generate a range of tasks to be printed:

- From the *Home* page of the ribbon and select the *Generate Tasks* option.
- From the *Select Task Dates* screen, move to and click on the ... command button adjacent to the *Start Date* field.
- Select the *Start Date* range from within this calendar, and click *Select Date*.
- Move to and click on the ... command button adjacent to the *End Date* field.
- Select the ending date for your tasks date range from within this calendar, and then click *Select Date*.
- Click the *OK* command button and the program will generate all tasks that fall within the date range you have just setup
- Next the *Generated Work Orders* screen will be displayed. From here you have a couple of options in the printing of tasks. To print all the tasks generated just move to and click on the *Print All* option in the ribbon.
- To print selected tasks from the list, click on the task you wish to print to select it, and then click the *Print Selected* option in the ribbon.
- From the *Preview* screen, click the *Print* command button to print the document.

Generate by Classification

To generate a range of tasks to be printed by Classification assignment, please follow these steps:

- From the *Home* page of the ribbon and select *Generate by Classes* option.
- From the *Select Task Dates* screen, move to and click on the ... command button adjacent to the *Start Date* field.
- Select the *Start Date* range from within this calendar, and click *Select Date*.
- Move to and click on the ... command button adjacent to the *End Date* field.
- Select the ending date for your tasks date range from within this calendar, and the click *Select Date*.
- Click the *OK* command button.
- From *Classifications* Lookup screen, select the Classification assignment of your choice from those listed.
- Click the *Select* button to have the program start the generation process.
- Next the *Generated Work Orders* screen will be displayed. From here you have a couple of options in the printing of tasks. To print all the tasks generated just move to and click on the *Print All* option in the ribbon.
- To print selected tasks from the list, click on the task you wish to print to select it, and then click the *Print Selected* option in the ribbon.
- From the *Preview* screen, click the *Print* button to print the document.

Printing the Current Work Order

To print the currently selected work order:

- From the *Home* page of the ribbon select the *Print Record* option.

Print Previewing the Current Work Order

To preview the currently selected work order:

- From the *Home* page of the ribbon select the *Preview Record* option.
- From the *Print Preview* screen, click the *Print* button.

Printing the Main Lookup View Grid

You can print the main grid or table that's located on the *Lookup* tab of the *Scheduler*.

To print the main grid and all its information:

- Sort or filter the database to your liking.
- Click on the *Module* button and move over the *Print* option.
- Select the *Print Table* option.

Printing All Work Orders

If the current sort or filtering of the Scheduler database has 30 or less records, you can tell the program to print every work order in the list.

To print all work orders:

- Open the *Filters* page in the ribbon and select the *Custom Sort Wizard Option*.
- Setup the criteria on this screen to show only the records you want to include. There will be more information on this wizard later in this chapter.
- If the resulting sort (filter) has 30 or less record in it, then click on the *Module* button and move over the *Print* option.
- Click on the *Print All* option.

Saving the Task to History

You can save a summary of any work order with a machine assigned to it to the machine or equipment's history log. This is an extremely useful feature as you can maintain a complete maintenance history on your equipment. This history record will be maintained even if the associated work order has been deleted or archived. The program also copies task completion notes to this history record for you automatically.

To save a task to equipment's history log:

- Locate and select the work order you want to save, and ensure there's an Equipment record assigned to the document.
- Open the *Work Orders* page in the ribbon.
- Click on the *Save to History Log* option.

- Next you'll be asked if you want to use the *Task Completion Date*. Click *Yes* to use the recorded completion date as found on the *Status* tab. A *No* answer will use the scheduled end date instead. *Cancel*, cancels the whole operation.

You can also save a copy of the task to history by using the *Complete* button found near the *History* button on the *Status* tab.

The following information is saved to the history record:

- General Task Information
- Current Equipment Meter reading
- Parts Used
- Labor Used
- Down Time Used
- Completion Notes

Plus you can click on the *History* button on the status tab to save to history.

Deleting a Work Order

To delete a work order from the database:

- Locate the work order you want to delete.
- Move to the *Home* page in the ribbon and select the *Delete Record* option.
- When prompted, click the *Yes* button.

IMPORTANT NOTE: Once a task has been deleted it's gone forever. If it's a recurring type task and the program has not already generated a new task for it, this functionality will also be lost. However, if the *Do Not Generate New Task* flag has been set, you should be completely safe in deleting it.

Deleting a Recurring Work Order

Recurring work orders are set to regenerate themselves at given intervals. Many times deleting only the work orders in the current sort does not get rid of them or prevent the work order from recreating itself. This is because there maybe tasks in the database that have not had the 'Do Not Generate New Task' flag set, and is stored in the future or beyond the current sort.

To delete a recurring work order and prevent it from regenerating itself, you must first locate the task in the database that does not have its 'Do Not Generate New Task' set. Once located you can set the 'Do Not Generate New Task' flag or delete the task (work order).

To delete a recurring work order from the database:

- Open the *Filters* page in the ribbon and select the *Not Re-Generated* option.
- Locate the work order you want to delete.
- Open the *Home* page in the ribbon and select the *Delete Record* option.
- When prompted, click the *Yes* button.

Copying and Pasting Work Orders

To copy a work order to be pasted into a new or different work order:

- Display the work order you want to copy.
- Open the *Work Orders* page and select the *Copy W.O.* option.
- Create or display the work order you want to copy to.
- Open the *Work Orders* page and select the *Paste W.O.* option.

Filtering the Database by Work Assignments

You can have the work orders database filtered by work assignments and open work orders. This comes in handy when you want to view a mechanic's back log or current work order assignments.

To filter the database by Work Assignments:

- Open the *Filters* page in the ribbon and move to the *Assignments* group.
- Click on the *Mechanics* option.

- From the *Employees Lookup* screen, select the mechanic you want to base your filter on. The database is searched for this mechanics in the three personnel assignments fields.
- Once the employee is selected, click on the *Select* button.
- To restore the database back to its normal sort, click the *Refresh* button on the *Lookup* tab.

Filtering the Database by Equipment Assignment

You can have the work orders database sorted by equipment assignments and open work orders. This comes in handy when you want to view all the open work orders for a given piece of equipment.

To sort the database by Equipment Assignments:

- Open the *Filters* page in the ribbon and move to the *Assignments* group.
- Click on the *Equipment* option.
- From the *Equipment Lookup* screen, select the equipment you want to base your sort on.
- Once the equipment is selected, click on the *Select* button.
- To restore the database back to its normal sort, click the *Refresh* button on the *Lookup* tab.

Custom Sorting of Work Orders Database

To create a custom sort of the database:

- Open the *Filters* page in the ribbon and move to the *General Sorts/Filters* group.
- Click on the *Custom Sort Wizard* option.
- Setup the options on this wizard to your liking, and click on the *OK* button.
- To restore the database back to its normal sort, click the *Refresh* button on the *Lookup View* tab.

Other Sort and Filter Options

Besides from the options available on the *Lookup* tab, you have other sort/filter options found under the *Filters* page in the ribbon. These options are useful when you want to sort or filter the database by specific criteria.

To use one of the above sort options:

- Open the *Filters* page in the ribbon and select the option of your choice.

Automatic Task Descriptions

There are two places within the Scheduler module that can create an automatic task description for you. These are found in the *Equipment* selection section on the *Details* tab, and on the *Instructions* tab in the *Task Instructions for Standard Work Orders* section.

To insert the auto descriptions:

- Move to the appropriate section.
- Click on the *Blue Arrow*.
- Edit the automatic description to your liking.
- Click on the *OK* button.

Note, the current description will be over written.

Work Order Search

To find a Work Order:

- Move to the *Home* tab in the ribbon and click on the *Find First* option or, press Ctrl - F.
- Move to the *Search Text* field and enter your search criteria.
- Move to the *Search Type* drop down list and select on which database field you want to base you search on.
- If you only want to return exact matching records from your search, place a check in the *Exact Match Only* check box. If this box is left blank, the application will automatically insert wild card characters in to the search.
- Click *Find First*.

To find additional matches to your search:

- Move to the *Home* tab in the ribbon and click on the *Find Next* option or, press F3.

Adding Task, Safety or Comments Instructions

For recurring type tasks we have provided a way of creating and then reusing multiple sets of task instructions, or work to be performed instructions. Once created the same set of instructions can be used over and over again and assigned to multiple work orders. This saves you time as you do not have to rewrite instructions for common tasks.

To add new instructions for use with your work orders:

- Open the *Instructions* page in the ribbon and select the appropriate *Add Instructions* option within the different groups found here.
- Type in a description or title for your new instructions in the space provided. The title can be up to 60 characters in length.
- Click *Ok*.

Editing Task, Safety or Comments Instructions

To edit instructions that you may have stored in your database, please follow these steps:


- Open the *Instructions* page in the ribbon and select the appropriate *Edit Instructions* option within the different groups found here.
- Next you'll be greeted with a screen containing a list box holding the descriptions of all the appropriate instructions found in the database. Move to this list and click on the description of the instructions you wish to edit.
- Click on the *Accept* command button.
- Once the *Instructions Editor* screen loads, edit your instructions by following the procedures as outlined in the Using the Instruction Editor section found Common Features chapter

Printing Task, Safety or Comments Instructions

To print out complete instruction lists:

- Open the *Instructions* page in the ribbon and select the appropriate *Print Instructions* option within the different groups found here.

Using the Instructions Editor

The Text Editor has been installed throughout the system where the user may need to create or edit large amounts of text. In most cases the Editor is accessed by clicking on a button with this icon: 

In the *Maintenance Scheduler* module, this editor is used as the *Instructions Editor* to create and edit both work orders tasks instructions, and tasks safety instructions. You gain access to this editor by using one of the available command buttons on the Scheduler's *Instructions* tab, or by selecting one of the options found under the *Instructions* ribbon tab.

Text Editor Home Tab



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

- Save and Close – Saves the current text 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.
- Delete – Deletes selected text
- Set Next Number – Allows you to set the next number to use for numbered lists.
- Reset to One – Resets the next number for numbered lists to one.
- Bullets Off – Turns on and off the bullets.
- Numbers – Turns on or off the numbered bullets.
- Numbers / Checkbox – Turns on and off the number – checkbox combination bullets,
- Checkbox – Turns on and off the checkbox bullets.
- Find – Helps to find matching text
- Find Next – Helps to find the next match.
- Select All – Selects the entire document.

- Cancel – Closes or exits the editor without saving any changes made.

Changing the Name of Your Instructions

To change or edit the name of the loaded instructions (Maintenance Task/Safety Instructions Only):

- Click the *Coordinator* button and select the *Edit Title* option.
- Type or edit the instructions name or title to your liking.
- Click the *OK* button.

Importing a Text File

If you want to, you can create your instructions 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:

- Click on the *Tools* tab.
- Click on the *Text Document* option in the *Insert* group.
- Use this *File Open* dialog as would any such dialog found in Windows.

Spell Check the Text Editor's Document

To spell check your document:

- Click on the *Tools* tab.
- Click on the *Spelling* option in the *Proofing* group

Print the Text Editor's Document

To print the current text editor's document:

- Click on the *Coordinator* button
- Move over the *Print* button.
- Select the appropriate *print* option.

Finding Text

To find text within your *Editor* document:

- Open the *Edit* menu and select the *Find Text* option.
- Type in the text you wish to find in the box provided.
- If you want the search to be case sensitive place a check mark in the *Match Case* check box.
- Move to the *Direction* area and select which direction you want to conduct your search. *Up* would search the document from the current cursor position towards the start of your document. *Down* would search in the opposite direction.
- Move to and click on the *Find Next* command button.
- To continue the search for the next match, again click the *Find Next* command button.
- To cancel the search move to and click on the *Cancel* command button.

Select All

To select all the text in the document:

- Open the *Edit* menu and choose the *Select All* option.

Toolbar Bullets

To turn on line bullets to be inserted into the document each time you press Enter:

- Move to the toolbar and select the bullet style of your choice.
- To start a new line, and at the same time insert the selected bullet, press Enter.
- To turn off the bullet feature, click on the same icon in the toolbar you used to turn on the bullet.

Using the Menu Bullets Option

We have included a couple options under the *Bullet* menu that will help ease the creation of your instructions. To access one of these functions just open the *Bullet* menu and select the appropriate options. The available options to choose from are outlined next.

- *Set Next Number* - When using a numbering sequence in your instructions, this option allows you to enter the next number that the program will automatically generate, and insert for you. To use this option, first click on the Set Next Number option under the Edit menu, next input your number in the box provided, followed by clicking on the OK command button.
- *Reset Number to One* - When using a numbering sequence in your instructions, and when this option is chosen, the next number entered into your instructions by the program will be the number one.
- *Numbers* - This option when chosen will both start a new line in your instructions, and input the next instruction number.
- *Boxes* - This option when chosen will both start a new line in your instructions, and insert a check box in them.
- *Numbers and Boxes* - This option when chosen will start a new line in your instruction, insert a check box, and also insert the next number.

Work Order Report Wizard

This option is the most robust reporting option found in the Scheduler module. This option utilizes the *Work Order Report Wizard*, which will allow you to setup a wide variety of reports based on the criteria you setup using the wizard.

You can setup this wizard to only report on tasks of a certain type, only report on a single piece of equipment, a single classification, a specific date range, and any combination of the above.

To use the Work Orders Report Wizard:

- Open the *Reports* page in the ribbon and click on the *Main Wizards* option.
- Click on the *Main Report Wizard* option.
- First choose the task types you want to report on. These task types are the same as the task types you use when setting up your tasks. There is however three new options available here, and will be explained next.
 - *All Tasks* - This option will allow you access to all available task types.

- *Planned Type Tasks* - This option includes all planned maintenance type tasks, and would include Planned Maintenance, Mini PMs, and Changeovers.
- *Work Order Type Tasks* - Tasks falling under this category include Imminent Danger, Safety Hazard, Safety Concern and Standard Work Orders.

- Next you need to choose the status indicators for the report wizard. Options here include the following:
 - *View All* - This status indicator will select all tasks no matter what their status.
 - *All Open* - This indicator will select all open tasks. This includes task with the Ready and On Hold status.
 - *Ready* - This indicator will only select those tasks that have a status setup of Ready.
 - *On Hold* - This indicator will only select those tasks that have a status setup of On Hold.
 - *Completed* - This indicator will only select those tasks that have a status setup of Completed.
 - *Cancelled* - This indicator will only select those tasks that have a status setup of Cancelled.

- *All Closed* - This indicator will select all tasks that have been closed. These include those marked as both Completed and Cancelled.
- Click the NEXT button in the toolbar.
- Next to setup in the Report Wizard is *Classification Assignment*. Here you select the *Classes* you want to include in your report. By clicking on the ALL CLASSES command button will include all available classifications.
- To select only those tasks that is assigned to a specific Classification, move to and click on the SELECT CLASS command button. This will display the *Classifications Assignments* screen.
- Next move to the list of classifications and select the class of your choice by clicking on.
- Next click on the SELECT command button to insert this class into the wizard.
- Repeat the above steps in setting up the *Equipment*, *Project*, *Account* and *Mechanic* you want to include in your report.
- Click the NEXT button in the toolbar.
- The next area that needs setup on the wizard is the *Date Ranges* section. Options available here include the following:
 - *Requested Dates* - When this option is selected only those tasks with a Requested Date that falls within the specified date range will be included in the sort.
 - *Schedule Start Dates* - When this option is selected only those tasks with a Scheduled Start Date that falls within the specified date range will be included in the sort.
 - *Completion Dates* - When this option is selected only those tasks with a Completion Date that falls within the specified date range will be included in the sort.
- *Start Date* - This field should indicate the start date of the date range for your sort. Change this date by double clicking in the field, and selecting your new date from within the displayed calendar.
- *End Date* - This field should indicate the ending date of the date range for your sort. Change this date by double clicking in the field, and selecting your new date from within the displayed calendar.
- *Include All Dates Check Box* - This check box is very important. If this box remains checked, any date range criteria that you may have setup will be ignored, and the program will return tasks of all dates. Removing the check here will allow the program to return only those tasks that meet the date range criteria that you have setup in this section.
- The last section of this wizard that requires your attention is the *Sort By* area. Here you can specify how you want the records sorted. You setup this criteria by selecting an option from those within the drop down list. Options available here include Request Dates, Task Priority, Task ID Numbers, Completion Dates, Task Types, Start Dates and Classifications.
- Next select an option button to tell the program to sort either in the ascending or descending order.
- If you want to include task instruction place a check in the *Print Task Instructions* checkbox.

- If you want to include completion comments place a check in the *Print Completion Comments* checkbox.
- Once the wizard has been fully setup to your liking, move to and click on the *Create Report* button to generate the report.

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.
- Open the *Reports* page in the ribbon and click on the *Current W.O.* option.
- Click on the *Work Order. Details* option.

Work Orders Down Time Report

The Down Time Report Wizard 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 use the Down Time Report Wizard:

- Open the *Reports* page in the ribbon and click on the *Main Wizards* option.
- Click on the *Downtime Wizard* option.
- Move to the *Work Orders Types* drop down list and select the type of work orders you want to base your report on.
- To specify what Classification Assignment to use, move to the *Classifications* section and click on the *Select Class* button.
- Move to the list box and select the Classification you want to use by clicking on it. Click *Select*.
- To use all classifications in your report. Click on the *All Classes* button in the *Classifications* section.
- To specify which equipment to report on, move to the *Equipment / Machines* sections and click on the *Select Equip* button.

- Select the equipment you want to base your report on by clicking from within the installed grid. Click *Select*.
- To base your report on all equipment, click on the *All Equipment* button in the *Equipment / Machines* section.
- Repeat the above couple of steps for the *Account* and *Project* sections.
- To specify the date ranges of your report move to the *Date Ranges* section and click on the ... command button adjacent to the *Start Date* field.
- Select the starting date of your report date range from within this calendar. Click *Select Date*.
- Repeat the above step for the *End Date* field.
- To use the specified date range, remove the check from the *Include All Dates* checkbox. To include all dates in your report, ensure this checkbox is checked.
- Move to the *Group Report By* drop down list and select how you would like to have the report grouped. The report will subtotal the total costs for each group.
- To have the report grouped in descending order place a check in the *Descending Order* check box.
- Click *Ok* to generate the report.

Work Orders Completion Analysis Report

The Work Orders Completion Analysis Reports look at all work orders that are completed in a given time frame, 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 were completed on time or late.

To create a Work Orders Completion Analysis Report:

- Open the *Reports* page in the ribbon and click on the *Completed WOs* option.
- Click on the *Completion Analysis* option.
- Select your start and end dates for your reports and click the *Accept* 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.

Repair Codes Report

Repair Codes Reports

Equipment Assignment Selection

Air Handling Unit-005 ...

Repair Code Selection

... ☒ Include all Codes

Completion Date Ranges

Start Date 5/30/2009 ...

End Date 5/30/2009 ...

☒ Include All Dates

OK Cancel

To create a Work Orders Completion Analysis Report:

- Open the *Reports* page in the ribbon and click on the *Completed WOs* option.
- Click on the *Repair Codes Report* option.
- Click on the ... button adjacent to *Equipment Assignment Selection* field.
- Click on the equipment you want to base your report on from those listed and click on the *Select* option in the ribbon.
- Click on the ... button adjacent to *Repair Code Selection* field.
- Click on the repair code you want to base your report on from those listed and click on the *Select* option in the ribbon.
- To use all codes insure that the *Include all Codes* checkbox is checked,
- Move and click on the ... buttons adjacent to the two date fields and setup this criteria
- To use all dates insure that the *Include All Dates* checkbox is checked.
- Click on the *Ok* 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 Issues/Performed
- Total Downtime.

To create an Equipment Summary Report:

- Open the *Reports* page in the ribbon and click on the *Summary Reports* option.
- Click on the *Equipment Summary* option.
- Move to the various section and setup you're the report criteria to your liking.
- Click the *OK* button.

Completion Summary Report

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

- Date Completed
- Equipment
- Reason for Outage
- Labor Hours
- Downtime
- Labor Costs
- Other Costs
- Total Costs

To create a Completion Summary Report:

- Open the *Reports* page in the ribbon and click on the *Summary Reports* option.
- Click on the *Completion Summary* option.
- Move to the various section and setup you're the report criteria to your liking.
- Click the *OK* button

Open Work Orders by Equipment

The Open Work Orders by Equipment reports allows you create a report on all open work orders for a given piece of equipment or machinery. This really comes in handy on PM

day when you can try to work on completing as many work orders as possible while the machine is down.

To create an Open Work Orders by Equipment Report:

- Open the *Reports* page in the ribbon and click on the *Open WOs* option.
- Click on the *Open by Equipment* option.
- From the *Equipment Lookup* screen, click on the equipment that you want to base your report on.
- Click on the *Select* button.
- Type in a title for your report and click *OK*.

Open Work Orders by Mechanic Report

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

To create an Open Work Orders by Mechanic Report:

- Open the *Reports* page in the ribbon and click on the *Labor Resources* option.
- Click on the *Open by Mechanic* option.
- From the *Mechanic Lookup* screen, click on the mechanic that you want to base your report on.
- Click on the *Select* button.
- Type in a title for your report and click *OK*.

Closed Work Orders by Mechanic Report

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

To create a Closed Work Orders by Mechanic Report:

- Open the *Reports* page in the ribbon and click on the *Labor Resources* option.
- Click on the *Closed by Mechanic* option.
- From the *Mechanic Lookup* screen, click on the mechanic that you want to base your report on.
- Click on the *Select* button.
- Type in a title for your report and click *OK*.

Projected Man Hours Needed Report

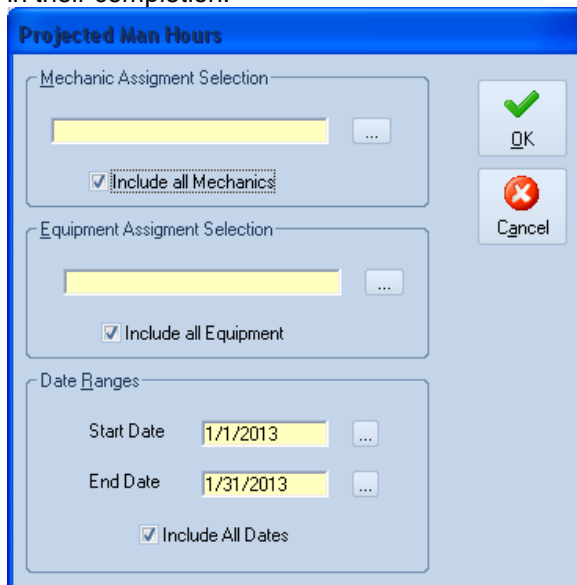
The Projected Man Hours Needed Report will return information on open work orders, and the man hours assigned for their completion. Included in the report are descriptions of the open tasks, the projected actual and difference in the hours needed in their completion.

To create a Projected Man Hours Needed Report:

- Open the *Reports* page in the ribbon and click on the *Labor Hours* option.
- Click on the *Projected Hours* option.
- Move to the *Mechanic Assignment* section and click on the ... button.
- Select a mechanic from the lookup screen and click the *select* button
- Move the *Date Ranges* section and setup the date range you want to base your report on.
- Click on the *OK* button.

Actual Man Hours Used Report

The Actual Man Hours Used Report will return information on closed work orders, and the man hours actually used are recorded for their completion. Included in the report are descriptions of the closed tasks, the projected, actual and difference in the hours needed in their completion.



The screenshot shows a dialog box titled "Projected Man Hours". It contains three main sections: "Mechanic Assignment Selection", "Equipment Assignment Selection", and "Date Ranges". Each section has a text input field with a yellow background and a dropdown arrow button. Below each section is a checkbox labeled "Include all [Mechanics/Equipment/Dates]". To the right of the dialog box are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Projected Man Hours

Mechanic Assignment Selection

...

☒ Include all Mechanics

Equipment Assignment Selection

...

☒ Include all Equipment

Date Ranges

Start Date 1/1/2013 ...

End Date 1/31/2013 ...

☒ Include All Dates

OK

Cancel

To create a Projected Man Hours Needed Report:

- Open the *Reports* page in the ribbon and click on the *Labor Hours* option.
- Click on the *Actual Hours* option.
- Move to the *Mechanic Assignment* section and click on the ... button.
- Select a mechanic from the lookup screen and click the *select* button
- Move the *Date Ranges* section and setup the date range you want to base your report on.
- Click on the *OK* button.

WORK ORDERS

It's true that with the PM Coordinator system you can create and view work orders in the *Scheduler* module, but that module was designed mainly for scheduling planned maintenance type tasks, and works well for that purpose. This module is designed for use with standard work orders, which includes safety related types. We believe you'll find this module is much easier to use for these types of work orders than the scheduler.

PM Coordinator (TRIAL MODE) - [Work Orders]

Options Go Databases Tools Help

PM Coordinator

Standard Work Orders

Work Orders Options

- + Add New Work Order
- Print Current Work Order
- Save to History Log

Sort Options

- Default Sort (All Open)
- View Work Requests
- Sort by Mechanic Assignment
- Sort by Equipment Assignment

Scheduler

Work Orders

Tasks Planner

Equipment

Home Filters Reports

Save to Insert Safety History Instructions Work Orders

Paste Cut Delete Clipboard

Add New Record Post/Save Changes Delete Record Records

Print Preview Record Record Print

Find First Find Next Search

Lookup View Details View Scheduling and Status

Work Order Reference Number: 0709-37 Estimated Down Time Needed:

Brief Description of Work to Perform: Bolts on top dispenser needs tightening

Work Requested By: Griggs, Fred Request Date: 10/29/2012

Classification: Production Equipment Safety Instructions: General Safety Instructions

Equipment: Case Palletizer Equipment Details

Work Order Type

☐ Imminent Danger ☐ Safety Hazard ☐ Safety Concern ☒ Standard Work Order

Work To Be Performed And Why It Should Be Performed

Bolts on top dispenser needs tightening, they're loose

Friday, December 29, 2012, 10:14

All the user needs to fill out is a single screen of information when creating a work order request, as opposed to a couple with the Scheduler module. All work 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.

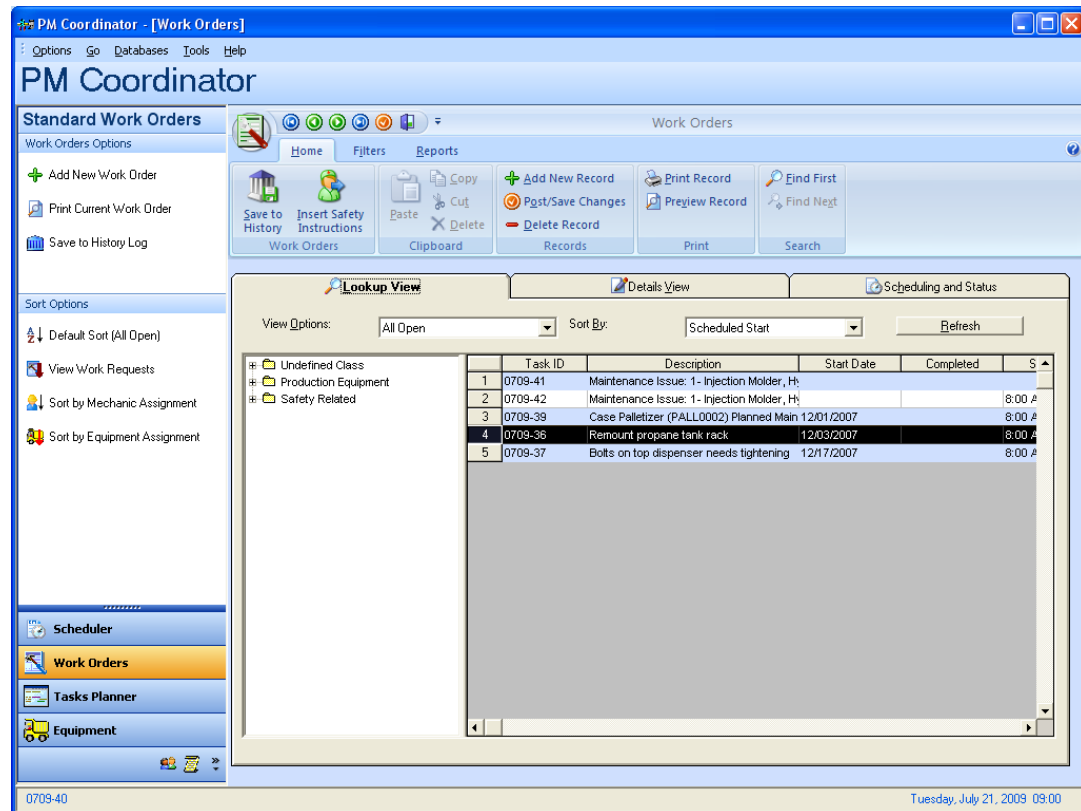
This module was made simple, with limited abilities on purpose. When more features and reports are needed with these work orders we suggest working with them in the Maintenance Scheduler module.

Understanding the Work Orders Tabs

In this section we will explore and explain the features found on each of the Work Orders module's tabs.

Lookup View

This is a lot like a lookup table. All work orders in the current sort will be located here. To select a work order, simply move to the grid and click on the record of your choice. Once selected you can move to the other tabs and edit the selected task.



The screenshot shows the PM Coordinator application window with the 'Work Orders' module selected. The 'Lookup View' tab is active, displaying a grid of work orders. The grid has the following columns: Task ID, Description, Start Date, Completed, and S. The 'View Options' dropdown is set to 'All Open' and the 'Sort By' dropdown is set to 'Scheduled Start'. The grid shows five records, with the first two being maintenance issues and the last three being equipment-related tasks.

Task ID	Description	Start Date	Completed	S
0709-41	Maintenance Issue: 1- Injection Molder, H		8:00 #	
0709-42	Maintenance Issue: 1- Injection Molder, H		8:00 #	
0709-39	Case Palletizer (PALL0002) Planned Main	12/01/2007	8:00 #	
0709-36	Remount propane tank rack	12/03/2007	8:00 #	
0709-37	Bolts on top dispenser needs tightening	12/17/2007	8:00 #	

Detail View

This is where you would create your standard work orders. Describe the work to be done, where it should be done, and other related information.

The screenshot displays the 'Details View' of the PM Coordinator software. The interface includes a top navigation bar with 'Home', 'Filters', and 'Reports' tabs. Below this is a toolbar with various icons for actions like 'Save to Insert Safety History Instructions', 'Clipboard', 'Add New Record', 'Post/Save Changes', 'Delete Record', 'Print', 'Preview Record', 'Find First', 'Find Next', and 'Find Next'. The main content area is divided into three tabs: 'Lookup View', 'Details View' (which is active), and 'Scheduling and Status'. The 'Details View' contains several input fields and buttons. The 'Work Order Reference Number' field is populated with '0709-37'. The 'Estimated Down Time Needed' field is empty. The 'Brief Description of Work to Perform' field contains the text 'Bolts on top dispenser needs tightening'. The 'Work Requested By' field is populated with 'Griggs, Fred'. The 'Request Date' field is populated with '10/29/2012'. The 'Classification' field is set to 'Production Equipment'. The 'Safety Instructions' field is set to 'General Safety Instructions'. The 'Equipment' field is set to 'Case Palletizer'. Below these fields are radio buttons for 'Work Order Type': 'Imminent Danger', 'Safety Hazard', 'Safety Concern', and 'Standard Work Order' (which is selected). At the bottom, there is a large text area for 'Work To Be Performed And Why It Should Be Performed' containing the text 'Bolts on top dispenser needs tightening, they're loose'. There are also buttons for 'REC' and 'REF' next to the text area.

- *Work Order Reference Number* – This is the internal number assigned to work orders. The first two digits of this number indicate the year the work order was generated. The next two numbers indicate the month the work order was generated. The last set of numbers is a sequential number generated by the program. You can change or reset the sequential part of this ID in the *Scheduler* module.
- *Estimated Down Time Needed* – This field is where you input the down time that may be required completing the task.
- *Brief Description of Work To Perform* – This field allows for a brief (100 characters max) description of the work to be performed.
- *Work Request By* – This field indicates the name of the person requesting the work to be performed. You can change this field by typing directly in it.

- *Request Date* – This is the date this work order was requested. Change the date here by clicking the ... command button, and then selecting a new date from the calendar.
- *Classification*– This is the classification assignment this work request relates to. Change this field by clicking the ... command button, and then selecting the new classification from within the list.
- *Safety Instructions* – This is where you select the safety instructions to use with your work order. These instructions can be setup in the *Scheduler* module. To select instructions just click the ... button adjacent to this field, and then select the instruction from the list. Click *Accept*.
- *Equipment* – This is where you specify what equipment this work order applies to. To select or make an equipment assignment, move to and click the ... button adjacent to this field, then select the equipment from the list. Click *Select*.
- *Equipment Details* – Clicking this command button will display additional details about the assigned piece of equipment.
- *Work Order Types* – This indicates the type assignment for the current work orders. Available options here are Imminent Danger, Safety Hazard, Safety Concern and Standard Work Orders. Change this assignment by clicking the appropriate option button.
- *Work To Be Performed and Why It Should Be Performed* – This field allows for a detailed description of the work to be performed, and any explanations as to why it should be done.

Note about Classifications

This module does not allow you to add Classifications to the database for assignment to these work orders. These Classification can however be modified in the Maintenance Scheduler module. Classification modified in the Maintenance Scheduler module affect both modules.

Scheduling and Status Tab

The screenshot shows the 'Scheduling and Status' tab in the PM Coordinator software. The interface includes a top toolbar with icons for Home, Filters, Reports, and various actions like Add New Record, Post/Save Changes, Delete Record, Print, and Search. Below the toolbar, there are tabs for Lookup View, Details View, and Scheduling and Status. The Scheduling and Status tab is active, displaying a form with the following sections:

- Delays and Completion Comments:** A large text area for recording delay reasons and completion comments.
- Status:** A section containing a 'Current Status' dropdown menu (set to 'Ready'), a 'Select Task' checkbox, and a 'History' button.
- Scheduling:** A section with fields for 'Schedule Start' (11/6/2012), 'Schedule End' (11/9/2012), 'Assigned To' (Albright, George), 'Start Time' (8:00 AM), 'End Time' (5:00 PM), and 'Responsible Manager' (Griggs, Fred).
- Completion Information:** A section with fields for 'Date Completed', 'Completed By', 'Time Down' (Hrs and Mins), and 'Meter Value', along with a 'Retrieve Current' button.

NOTE: The person or persons responsible for the administration of work orders should fill out information on this screen.

- **Delay and Completion Comments** – This area is used to record delay reasons for the completion of the work order. It is also used to record any comments on the completion of the task.
- **Status** – This field indicates the current status of the task, and is changed by clicking on a new indicator from the drop down list. Available indicators here are Ready, On Hold, Cancelled, Completed, and Work Request. *All new work orders are assigned a status of work request, and remain this way until changed manually.*
- **History** – Clicking this button will save a copy of this work order to the History log of the assigned piece of equipment.
- **Scheduled Start** – This field indicates the scheduled starting date the administrator has assigned to the task. Change this date by clicking the ... command button, and selecting a new date from the calendar.

- *Scheduled End* - This field indicates the scheduled ending date the administrator has assigned to the task. Change this date by clicking the ... command button, and selecting a new date from the calendar
- *Assigned To* - This field indicates the name of the person that is currently assigned to perform or see that the task is completed. Change this field by clicking on the ... button adjacent to it, then selecting a name from within the list. Click *Select*.
- *Responsible Manager* - This area indicates the manager that is responsible to make sure that the work order is completed. Change this name by clicking on the ... command button and then selecting the name from within the quick entry list.
- *Date Completed* - This field indicates the date the work order or task was completed. Change or assign a date here by clicking on the ... command button and selecting a new date from the calendar.
- *Completed By* - This field indicates the name of the person that completed the assigned task. Change this name by selecting a new name from the drop down list.
- *Down Time* - Use these fields to record the total down that was required to complete the work order.
- *Meter Value* - Use this field to record the meter reading at the time the work order was completed
- *Retrieve Current* - This retrieves the current meter reading from the equipment database and inserts this information into the *Meter Value* field.

Adding or Creating a New Work Order

To create a new work order:

- Click the *Add New Record* option on the *Home* page of the ribbon.
- Move to and setup the various fields found on the *Work Order Details View* tab.
- Click on the *Post/Save Changes* option to ensure the record is saved.

Deleting a Work Order

To delete a work order:

- Select the work order you want to delete.
- Click the *Delete Record* option on the *Home* page of the ribbon.

- When asked about the deletion, click **Yes**

Saving the Work Order to the Equipment History Log

To save a copy of the work order to the equipment history log:

- Select the work order you want to save information on.
- Ensure that work order has equipment assigned to it.
- Click on the *Save To History* option in the ribbon or click the *History* button on the *Scheduling and Status* tab.

Filtering Options

To specify which records to include in the current database filter:

- Move to the *Filters* tab in the ribbon.
- Select the filter/sort option of your choice

Filtering the Database by Work Assignments

You can have the work orders database filtered by work assignments and open work orders. This comes in handy when you want to view a mechanic's back log or current work order assignments.

To sort the database by Work Assignments:

- Move to the *Filters* tab in the ribbon and move to the *Filter by Assignments* group.
- Click on the *Mechanic Assignment* or *Mechanic Due Today* options.
- From the *Employees Lookup* screen, select the mechanic you want to base your sort on. The database is searched on mechanics in the three resource assignments fields.
- Once the employee is selected, click on the *Select* button.
- To restore the database back to its normal sort, click the *Refresh* button on the *Lookup View* tab.

Filtering the Database by Equipment Assignment

You can have the work orders database sorted by equipment assignments and open work orders. This comes in handy when you want to view all the open work orders for a given piece of equipment.

To sort the database by Equipment Assignments:

- Move to the *Filters* tab in the ribbon and move to the *Filter by Assignments* group.
- Click on the *Equipment Assignment* option.
- From the *Equipment Lookup* screen, select the equipment you want to base your sort on.
- Once the equipment is selected, click on the *Select* button.
- To restore the database back to its normal sort, click the *Refresh* button on the *Lookup View* tab.

Lookup View Options

On the Lookup tab you have the option to display just the table of records, just a classification tree or both. Once selected the program will remember your setup the next time the module is activated.

To setup your view options:

- Click on the *Module* button and move over the *Lookup View Options* choice.
- Now click on the option of your choice.
- Click on the *Refresh* button on the *Lookup View* tab.

Safety Instructions

You have your choice of using the standard set of safety instructions with your work orders or specifying your own instructions. You can't actually create your own instructions from within this module, but you can create them in the *Scheduler* module, and then use them here.

To specify your own set of safety instructions:

- Locate the work order you want to apply the instructions to.
- Select on the *Insert Safety Instructions* option in the ribbon or click on the ... button adjacent to the *Safety Instructions* field on the *Details View* tab.
- Move to the grid containing the descriptions of available instructions and click on the one of your choice.
- Click *Select*.

Printing the Current Work Order

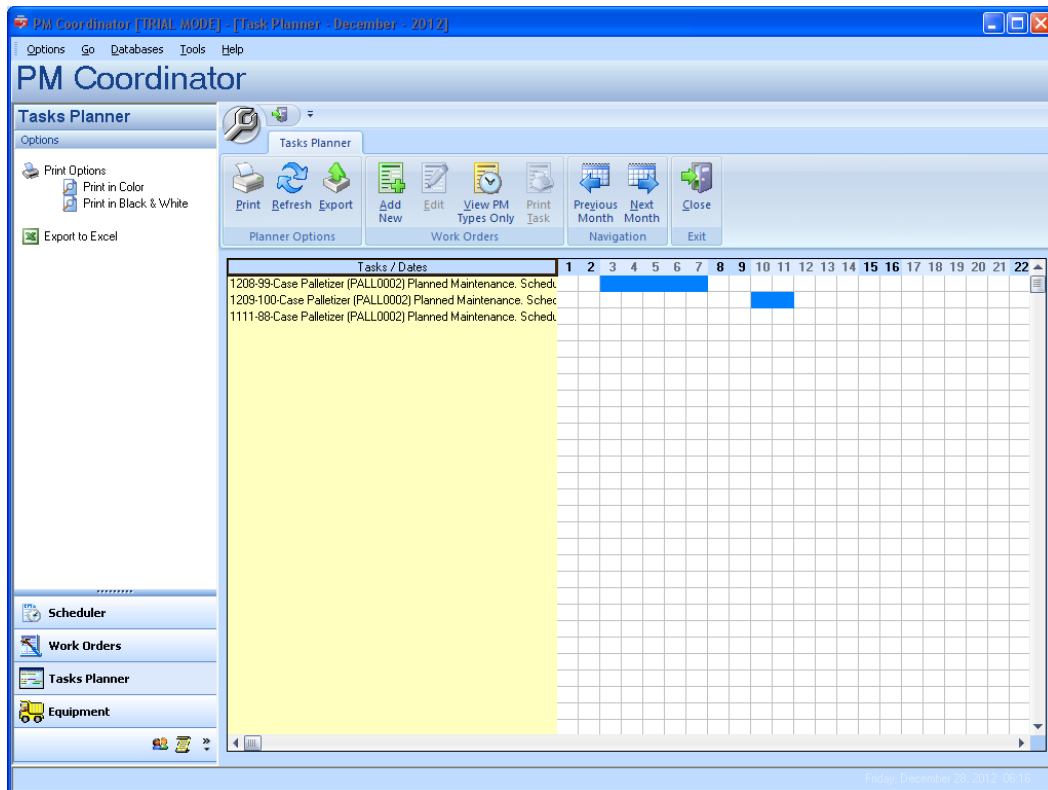
To print the current work order:

- Click on the *Print Report* or *Review Record* options in the ribbon.
- Click on the icon of the *Printer* in the *Preview's* screen toolbar to print the document.

Task Planner

Using the Task Planner Option

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



To access the *Task Planner* screen:

- Click on the *Task Planner* option in the shortcut toolbar or from the *Go* page in the ribbon.

Print the Planner Schedule

To print the planner schedule:

- From the *Tasks Planner* screen move to and click on the *Print* option in the ribbon.

Printing a Single Task with the Planner

To print a single work order using the *Task Planner*:

- Move to the *Tasks Planner* screen.
- Select the task you want to print from those found in the planner's grid.
- Click on the *Print Task* option in the ribbon.

Creating a New Work Order with the Planner

To create a new task or work order using the *Task Planner*:

- Move to the *Tasks Planner* screen.
- Click on the *Add New* option in the ribbon.
- Create your task using the *Work Order Wizard*. For more information on this wizard look at the *Work Orders Creation Wizard* section found earlier in this chapter.

Editing a Task with the Planner

To edit a new task or work order using the *Task Planner*:

- Move to the *Tasks Planner* screen.
- Select the task you want to edit from those found in the planner's grid.
- Click on the *Edit* option in the ribbon.
- Edit your task using the *Work Order Wizard*. For more information on this wizard look at the *Work Orders Creation Wizard* section found earlier in this chapter.

Moving Between Months on the Planner Screen

- To move between months on the *Tasks Planner* screen use the *Previous Month* and *Next Month* option in the ribbon.

Exporting with Tasks Planner

To export or save the *Tasks Planner* screen to be read by another (supported) program, please follow these steps:

- From the *Tasks Planner* screen move to and click on the *Export* option in the ribbon. This will bring up the Save Schedule dialog screen.
- Use this dialog as you would use any normal "Save As" dialog. Select the save path and directory. Specify the file name, and under the *Save as Type* drop down, select the file type you wish to save this file as.
- Click *Save*.

View PM Types Only in the Task Planner

By default, the Task Planner displays all work orders types. However, so people may want to only view recurring, or planned maintenance types of tasks or work orders.

To view only recurring types of work orders:

- Open the Tasks Planner.
- Click on the *View PM Types Only* option in the ribbon.

To switch back to viewing all work order types:

- Click on the *View PM Types Only* option in the ribbon.

Equipment Database

Equipment Database Overview

In this section we'll be discussing the *Equipment and Machinery* database module. Use this module to record information about your facility's equipment, including such items as warranty information, asset numbers and the like.

Records in this database are also used in the machine assignment sections of the *Scheduler* and *Work Orders* modules.

The screenshot displays the PM Coordinator software interface, specifically the Equipment Database module. The window title is "PM Coordinator [TRIAL MODE] - [Equipment and Machinery]". The interface includes a menu bar (Options, Go, Databases, Tools, Help) and a toolbar with icons for Home, Asset, and Reports. A left sidebar contains navigation options: Equipment Database, Equipment Options, Equipment Meters, Scheduler, Work Orders, Tasks Planner, and Equipment. The main area shows a detailed record for a piece of equipment with the following fields:

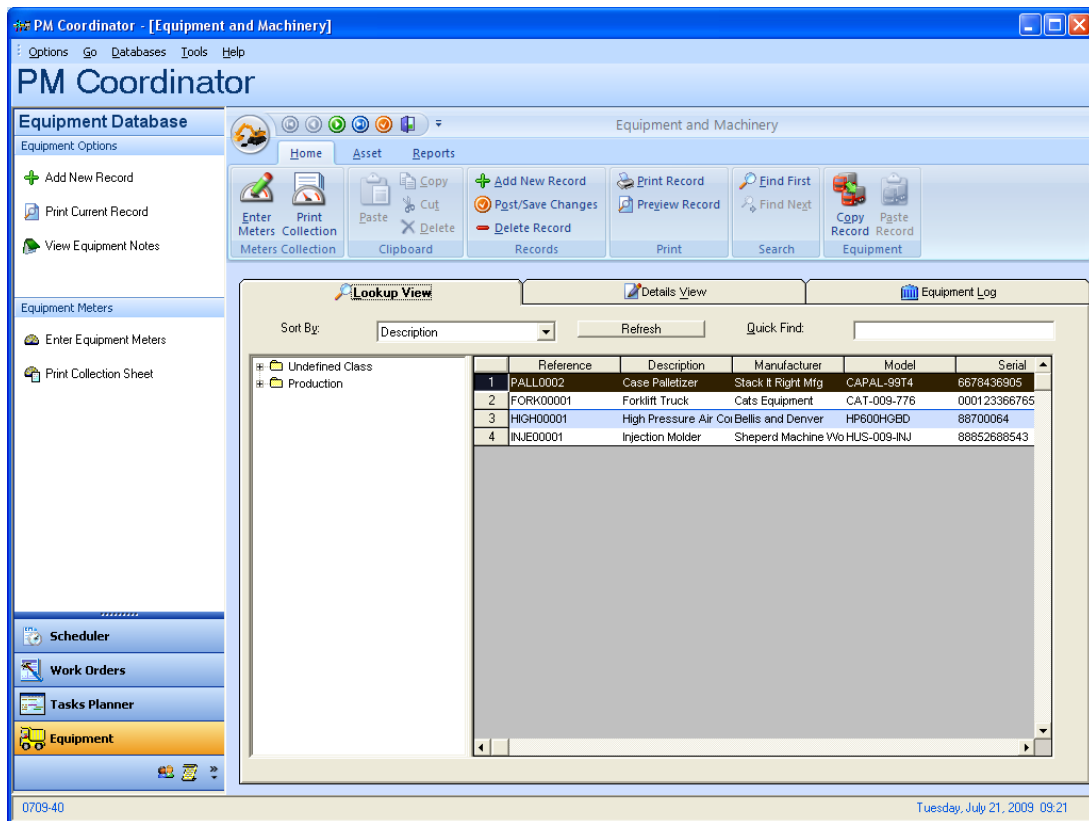
- Reference:** PALL0002 (with a REF button)
- Building:** Production Floor
- Description:** Case Palletizer
- Room:** (empty)
- Manufacturer:** Stack It Right Mfg
- Account:** (empty)
- Model No:** CAPAL-99T4
- Classification:** (empty)
- Serial No:** 6678436905
- Vendor:** (empty)
- Assigned To:** Albright, George
- Meter Reading:** 375 (with a "Use Meter" checkbox)
- Location:** Main Production floor
- Meter Type:** Hours (with an "In-Service" checkbox)
- Safety Instruct:** General Safety Instructions

Below the main fields, there are tabs for "Leasing and Warranty", "Appraisal", and "Vehicle". The "Leasing and Warranty" tab is active, showing:

- Leasing and Client Information:**
 - Owned/Leased: Owned (dropdown)
 - Company: (empty)
 - Start Date: (empty)
 - End Date: (empty)
- Warranty Information:**
 - Start Date: (empty)
 - End Date: (empty)
 - Warranty Info: (empty text area)

Lookup View

The *Lookup View* tab acts much like a lookup table. Here you simply click on the equipment of your choice to select it. Once selected you can move to the other tabs to view or edit the record.



To resort the database:

- Move to the *Lookup View* tab.
- Select a sort option from the *Sort By* drop down list. The database will be sorted by whatever field you selected from this list.
- Hit the *Refresh* button to resort the database

Adding New Equipment

To add a new Equipment record to your database:

- Click the *Add New Record* option in the ribbon.
- Move to the *Details View* tab by clicking on it. Then enter the appropriate information for each of the fields found there.
- Click on the *Post/Save Changes* button to ensure everything is written back to the database

Equipment Reference Field

This field, found on the *Details View* should contain a unique identifier for each different piece of equipment entered into the database. We did not however make this a mandatory rule as everyone has their own way of doing things. You can however verify if the identifier you've entered is unique to the database.

To test to see if your identifier is unique:

- Enter your *Reference ID* in the space provided.
- Move to and click on the *Check* button adjacent to this field. The program will then inform you as to whether a matching identifier was found.

Once you have entered the Description field, you can click on the *REF* button adjacent to this field and program will automatically create a unique ID for the selected equipment record.

Deleting a Equipment Record

To delete a record from the database please follow these steps:

- Locate the record you want to delete by using one of the available lookup routines on the *Equipment Details* tab.
- Click on the *Delete Record* option in the ribbon.
- When prompted about the deletion, move to and click on the *Yes* button.

Leasing and Warranty Information

You can maintain leasing, ownership and warranty information on your equipment by:

- Moving to the *Details View* tab and then clicking on the *Leasing and Warranty* tab near the bottom of the screen.
- Move to the various fields on this tab and setup the appropriate information for that field.

Appraisal and Asset Information

The screenshot shows a software interface with three tabs at the top: "Leasing and Warranty", "Appraisal", and "Vehicle". The "Appraisal" tab is currently selected. Below the tabs, there are several input fields and a button. On the left, there are four rows of labels and input boxes: "Service Date:" with a date field containing "10/19/2005" and a calendar icon; "Asset No:" with an empty text box; "Original Value:" with an empty text box; and "Appraisal Value:" with a text box containing "64000". On the right, there is a label "Appraisal Date:" followed by a date field containing "9/18/2007" and a calendar icon. Below the "Appraisal Date:" field is a button with a calculator icon and the text "Calculate Value".

To maintain appraisal and asset information:

- Move to the *Details View* tab and then click on the *Appraisal* tab near the bottom of the screen.
- Move to the various fields on this tab and setup the appropriate information for that field.

Vehicle Information

To maintain vehicle type information:

- Move to the *Details View* tab and then click on the *Vehicle* tab near the bottom of the screen.
- Move to the various fields on this tab and setup the appropriate information for that field.

Use the Meter value in the upper section to record mileage.

Calculating the Appraised Value of an Asset

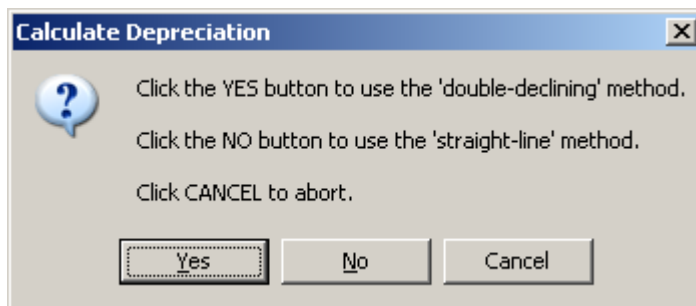
You can calculate an asset's depreciation using either the double-declining balance method or the straight-line depreciation method.

When using this option you will need the following information available, as you will be prompted for it:

- The initial cost of the asset.
- The asset's useful life in months.
- The salvage or value of the asset at the end of its life.
- The current year in the depreciation calculation.

To calculate the appraised value of a piece of equipment:

- Locate the piece of equipment you want to make your calculation on using one of the lookup methods.
- Move to the *Details View* tab and then click on the *Appraisal* tab near the bottom of the screen.
- Click on the *Calculate Value* button or open the *Asset* page and select the *Calculate Depreciation* option.



- Click the Yes button to use the 'double-declining' method, click No to use the 'straight-line' method.
- As prompted, fill in the appropriate information. Click the Ok button to move to the next question.

Default Safety Instructions

You can assign a default set of safety instructions to each of your assets. This way as this equipment is assigned to new work orders, these instructions will be automatically insert into these new tasks. You'll still have the ability to use a different set of instructions if you so desire.

To assign default safety instructions to an asset:

- Locate the piece of equipment you want to make assign the instructions to by using one of the lookup methods.
- Open the *Asset* page and select the *Default Safety Instructions* option
- Select the safety instructions of your choice from those listed.
- Click on the *Select* button.

To create or edit these instructions, you will need to do so from within the *Maintenance Scheduler* module.

Lookup View Options

You can set up the module to show a Classification tree, data grid, or both for use with the *Lookup View* tab

To setup the equipment Lookup View Options:

- Open the *File* menu and select the *Lookup View Options* option.
- Select the appropriate option as which elements you want displayed.

Enter Meter or Mileage Readings

If you have the *Use Meter* checkbox checked on the *Details* view of a piece of equipment, then that equipment will show up in a *Meter Quick Entry* screen. This quick entry screen will allow you to enter updated equipment reading in one easy to use screen. This saves you from having to browse through all the records in the database to enter this information.

To enter meter readings for all equipment set for meters:

Description	Reference	Meter
Case Palletizer	PALL0002	375
Forklift Truck	FORK00001	10075

- Open the *Home* page and select the *Enter Meters* option.
- Move to the far left column of the grid, and double mouse click to enter edit mode.
- Type or edit the reading for that piece of equipment.
- When you are done with one meter, click the *Enter* key to move down to the next.
- Once all readings have been updated, move to and click on the *Update Meters* button to update the database.

Export Meter Collection Spreadsheet

To export the meter collection form to an Excel 97 spreadsheet:

- Open the *Home* page and select the *Enter Meters* option.
- Move to and click on the *Export* button.
- Browse to where you want to export this document to, and type in a name in the *File Name* text box.
- Hit the *Save* button.

You may want to use the export function so you can use the spreadsheet in Excel, for perhaps some automatic data collection supplied by your technical department, for example.

Import the Meter Collection Spreadsheet

You can import a Meter Collection spreadsheet that was previously exported by the program. You want to make sure you only import spreadsheets created by our application or it may not have the proper format for importing the information back to the database.

To import the meter collection form from an Excel 97 spreadsheet:

- Open the *Home* page and select the *Enter Meters* option.
- Move to and click on the *Import* button.
- Browse to where you want to import document save, and then select the file
- Hit the *Open* button.
- Move to the *Select Sheet* drop down and select the sheet name that contains the imported information.
- If the spreadsheet is in the proper format, you could now update the database with new information. To do so click on the *Update Meters* button.

Copy and Paste Equipment

As a time saving feature, we allow you to copy an equipment record to be pasted into another equipment record. This comes in handy when you have multiple equipment of the same type. After the paste, you may only need to modify a few select fields.

To Copy an equipment record:

- Display the record you want to copy.
- Click the *Copy Equipment* option in the ribbon.

To Paste an equipment record:

- Create or display the record you want to copy to.
- Click the *Paste Equipment* option in the ribbon.

Equipment Notes

You can keep detailed notes on each piece of your equipment. The notes editor uses our built in word processor that is used throughout the Maintenance Coordinator system. To find how to use the features of this word processor please refer to the *Word Processor* chapter.

To access the parts notes:

- Locate and select the equipment item you want to work with.
- Move to the *Assets* page in the ribbon.
- Click on the *Notes* option.

Equipment Picture

You can include a picture of each of your assets in the database. The picture viewer used here is used throughout the *Maintenance Coordinator* system. To find out more about this viewer please refer to our *Common Features* chapter.

To view or edit the asset's picture:

- Locate and select the equipment item you want to work with.
- Move to the *Assets* page in the ribbon.
- Click on the *Picture* option.

We included this feature because a lot of people require the ability to embed images into the database. We do not however recommend over using this feature as images use a lot of database space, and can affect performance if too much space is used. A better way to include images is by using the *Attachments* feature, where images can be stored on hard drives and just linked to. You can find more information on the *Attachments Feature* in the *Common Features* chapter.

Printing the Current Equipment

To print the current equipment record:

- Locate the record you want to print using one of the available lookup routines.
- From the *Home* page of the ribbon select the *Print Record*, or the *Preview Record* option.

Equipment Log

Use the *Equipment Log* to keep a complete history of your equipment. Record such items as PMs, repairs made, and other important items. Entries to this log can come from work orders, and can also be made manually. For entries from work orders please refer to the *Maintenance Scheduler* and *Work Orders* modules.

The screenshot displays the 'Equipment Log' window. At the top, there are tabs for 'Home', 'Asset', and 'Reports'. Below these are several toolbars with icons for 'Enter Meters', 'Print Collection', 'Clipboard' (Copy, Paste, Cut, Delete), 'Records' (Add New Record, Post/Save Changes, Delete Record), 'Print' (Print Record, Preview Record), 'Search' (Find First, Find Next), and 'Equipment' (Copy Record, Paste Record). The main area has 'Lookup View' and 'Details View' tabs. The 'Equipment History Log' title is centered. Below it is a 'Quick Find Field' with a dropdown menu set to 'Entry' and a 'Quick Find' text box. A table with three columns: 'Date', 'Entry', and 'Details' is shown. The first row contains the date '11/17/2008', the entry '(Planned Maintenance-0709-38) Case Palletizer (P.', and details '[Meter: =300] [Schedule Start: =11/28/2007 8:00 AM] [Schedule End: =11/30/2007 5:00 PM] [Date Completed: =11/17/2008]'. To the right of the table are buttons for 'Add New', 'Edit Entry', 'Delete', and 'Print'. At the bottom, there are two text boxes: 'Entry Title' containing '(Planned Maintenance-0709-38) Case Palletizer (PALL0002) Planned Maintenance. Scheduled: Bi-Monthly' and 'Entry Details' containing '[Meter: =300] [Schedule Start: =11/28/2007 8:00 AM] [Schedule End: =11/30/2007 5:00 PM] [Date Completed: =11/17/2008]'. A status bar at the bottom shows 'Equipment Log' with navigation arrows.

	Date	Entry	Details
1	11/17/2008	(Planned Maintenance-0709-38) Case Palletizer (P.	[Meter: =300] [Schedule Start: =11/28/2007 8:00 AM] [Schedule End: =11/30/2007 5:00 PM] [Date Completed: =11/17/2008]

Adding Records to the Log

Edit Log Entry

Equipment Log Entry

Date: 11/17/2008

Entry Title: [Planned Maintenance-0709-38] Case Palletizer (PALL0002) Planned Maintenance. Scheduled: Bi-Monthly

Log Entry: [Meter: =300]
[Schedule Start: =11/28/2007 8:00 AM]
[Schedule End: =11/30/2007 5:00 PM]
[Date Completed: =11/17/2008]

OK Cancel

To add a record to the *Equipment Log*:

- Move to the *Equipment Log* tab.
- Click on the *Add New* button.
- To change the date of the entry, click on the ... button adjacent to the date field.
- Move to the *Entry Title* field, and enter a descriptive title for this entry.
- Move to the *Log Entry* section and record the details about this entry.
- Click on the *OK* button when done.

Editing History Log Entries

To edit an entry:

- Move to the *Equipment Log* tab.
- Move to the grid and select the entry you want to edit.
- Click on the *Edit Entry* button.
- Edit the entry in the same fashion as it was created. Click the *OK* button.

Deleting Records from the Log

To delete a record from the *Equipment Log*:

- Move to the *Equipment Log* tab.
- Move to the grid and select the record you wish to remove by clicking on it.
- Move to and click the *Delete* button.

Printing the Equipment Log

To print the log for the currently selected equipment:

- Locate and select the equipment record that you want to print the log from.
- Move to the *Equipment Log* tab, and click on the *Print* button or open the *Reports* menu and select the *Equipment Log* option.
- To print the document, click on the *Print* option in the toolbar.

Equipment Asset/ List Report

To create an Equipment Asset/List Report:

- Open the *Reports* tab and select the *Assets* option in the *Main List* group.
- Next select how you want the report created, *PDF Format* or *Spreadsheet Format*. Export options change by the selection you make.
- Move the *Locations* area and type in the location you want to base your report on. You can also click on the ... adjacent to this field to pull up a list, select the location from the list, and then click the *Select* button.
- If you want to use all locations, place a checkmark on the *Use All Locations* checkbox.
- Repeat the above two steps for the *Accounts*, *Classification*, *Assignments*, *Building* and *Manufacturer* fields.
- Move to the *Sort Records By* drop down, and select how you want your report sorted.
- Move to the *Status* drop down and select the indicator you want to report on.
- Click on the *OK* button to create the report.

Selected Equipment Work Orders

To obtain a summary of work order that is assigned to the currently selected equipment:

- Open the *Reports* page and select the *Work Orders* option
- Move to the *Work Order Types* section and select the work order types to base your report on.
- Move to the *Status* section and select the appropriate option from the drop down list.
- Move to the *Date Range* section and setup this criteria
- Click on the *OK* button.

Selected Equipment Work Types Report

To print a report on all the work orders types that are currently assigned to the currently selected equipment:

- Open the *Reports* page and select the *Selected by Types* option.

All Equipment Work Orders Types Report

To print a report on all the work orders types that are currently assigned to all your equipment:

- Open the *Reports* page and select the *All by Types* option.

Printing a Meter Readings Data Collection Sheet

To print a meter data collection sheet:

- Open the *Home* page and select the *Print Collections* option.

Employees and Mechanics

Employees and Mechanics Overview

The Employees and Mechanics module is used to store important information about your work force. Information found here includes their position, address, telephone numbers, emergency contacts and more.

PM Coordinator [TRIAL MODE] - [Mechanics and Employees]

Options Go Databases Tools Help

PM Coordinator

Employees Database

Personnel Options

- Employees Lookup
- Add New Record
- Preview Current Record
- Employee's Notes

Home Reports

Lookup Copy Paste Cut Delete Add New Record Pgst/Save Changes Delete Record Print Preview Record Find First Find Next Search

Lookup View Details View

Reference ID: ALBR00001 [✓] REF

Name: Albright, George

Title or Position: Maintenance Mechanic

Address: 21021 E. Fullerton Rd

Address:

City: Apple Valley

State: CA Zip Code: 92322

Home Phone: 760-555-8989 Pager:

Cell Phone:

Shift or Crew:

Hourly Rate: 20

Picture

Browse Clear

Notes Emergency Contact

Simplicity Software Technologies Inc. Friday, December 20, 2013 10:48

Please note that this mechanic database is the same database used by the Scheduler module where you create work assignments.

Table View

The *Table View* shows you the current database and its current sort in table form. This table format helps facilitates a faster lookup of your database records. You can change the sort order of the table by accessing the *Sort By* drop down list box, and then selecting a sort option from within this list. On an option has been clicked on, the database will be resorted by this selection.

Adding A New Mechanic

To add a new mechanic:

- Click on the *Home* tab of the ribbon
- Click on the *Add New Record* option in the ribbon's *Records* group.
- Move to the *Details View* tab by clicking on it.
- Move to the various fields and enter the appropriate information for that field.
- When you are done with one field, use your tab key to move to the next.
- To ensure that all information is written back to the database, click on the *Post/Save Changes* option in the ribbon's *Records* group.

Adding a Mechanic's Picture

To add a picture to your Mechanic's record:

- Locate the Mechanic's record you want to work with by using one of the lookup routines.
- Move to the *Details View* tab by clicking on it.
- Move to the *Picture* section of the screen and click on the *Browse* button.
- Use this *File Open* type dialog as you would any file open dialog found in windows. Select the picture file you want to use.
- Click the *Open* button.

Removing a Mechanic's Picture

To remove a mechanic's picture:

- Locate the Mechanic's record you want to work with by using one of the lookup routines.

- Move to the *Details View* tab by clicking on it.
- Move to the *Picture* section on the screen and click on the *CLEAR* command button.
- When asked if you are sure that you want to perform this operation, click the *YES* button.

Deleting a Mechanic from the Database

To delete a mechanic from the database:

- Locate the Mechanic's record you want to delete using one of the lookup routines.
- Move to the *Records* group in the ribbon and select the *Delete Record* option.
- When asked if you are sure that you want to perform this operation, click the *Yes* button.

Recording Emergency Contact Information

To record a Mechanic's emergency contact information:

- Locate the Mechanic's record you want to delete using one of the lookup routines.
- Move to and click on the *EMERGENCY CONTACT* command button.
- Enter the appropriate information for each of the fields found on this screen.
- Click the *CLOSE* command button when done.

Printing a Mechanic's File

To send a copy of a mechanic's file to a printer:

- Locate the Mechanic's record you want to print using one of the lookup routines.
- Move to the *Home* tab in the ribbon.
- Click on the *Preview Record* option in the *Print* group
- After the *Report Preview* screen loads, move and click on the icon of a printer to print the document.
- Click on the *OK* from the *Print Dialog* screen.

Mechanics Phone List

To create a telephone list report:

- Click on the *Reports* tab in the ribbon and then select the *Telephone List Report* option.
- After the *Report Preview* screen loads, move and click on the *Print* button to print the document.
- Click on the *OK* from the *Print Dialog* screen.

Mechanics Address List

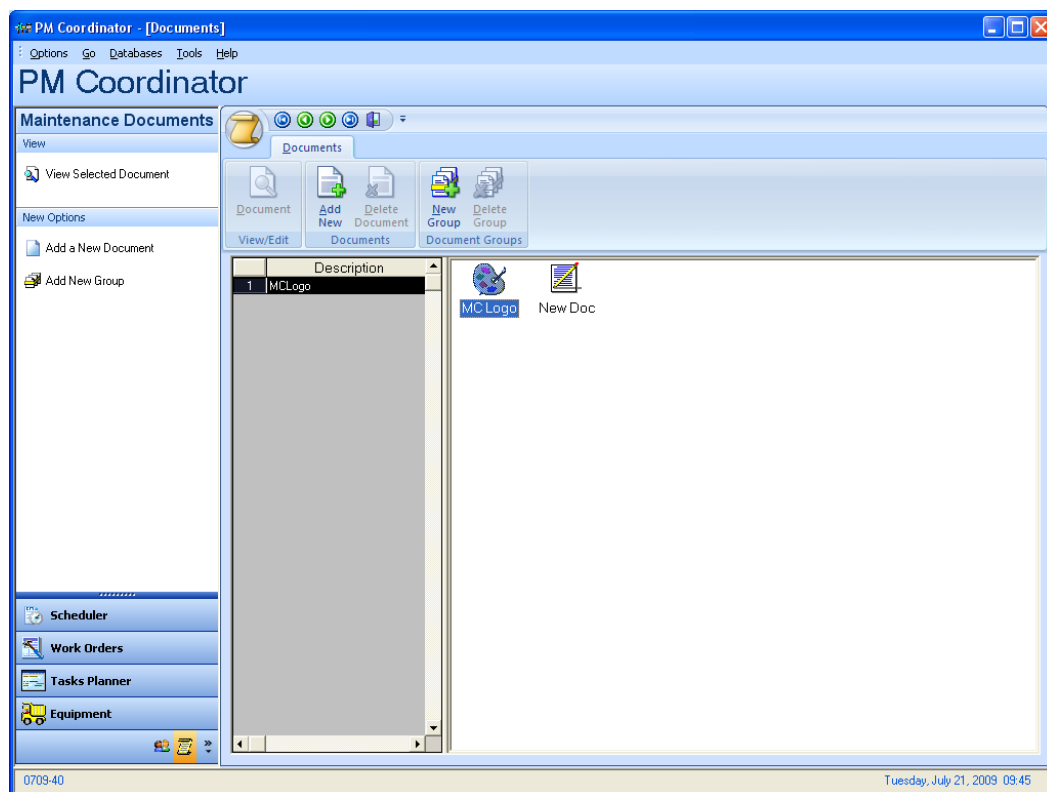
To create an address list report:

- Click on the *Reports* tab in the ribbon and then select the *Address List Report* option.
- After the *Report Preview* screen loads, move and click on the *Print* button to print the document.
- Click on the *OK* from the *Print Dialog* screen.

Maintenance Documents

Documents Overview

Any maintenance department 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, 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 feature.



You can create three different types of documents with this feature. One is a picture document, which can be GIF, JPG, BMP, WMF and ICO formats. The next type of documents can be the editor type. These editor type documents features the use of our built-in word processor. This word processor feature many professional features such as multiple fonts, colors, paragraph formatting, the use of tables and more. Documents created in our word processor are compatible with almost all windows based word processors such as Word and Word Perfect.

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

Access the Documents Feature

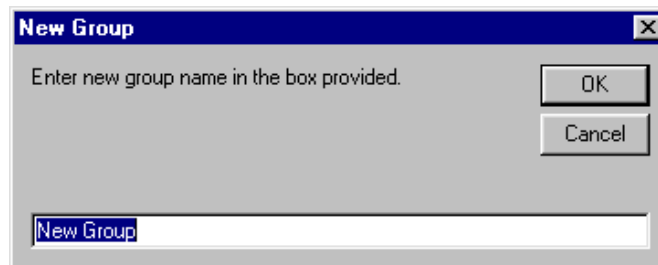
To access the Documents Feature:

- Open the *Go* menu and select the *Maintenance Documents* option or click on the *Documents* button in the Shortcut bar.

Add Document Group

Every document used with this program must belong to a document group. These groups will help you keep your information in a more organized form.

To create a Document Group:

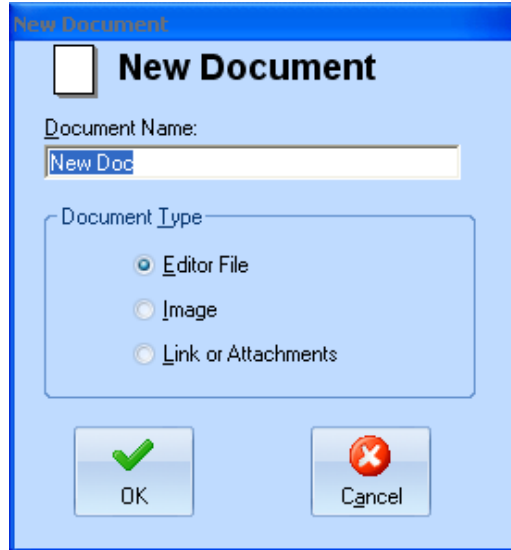


- Move to and click on the *New Group* option.
- Type in the name of your new group in the space provided.
- Click the *OK* button.

You can edit the name of your group directly from within the grid once it has been created.

Adding a New Document

To create a new document:



- Move to the *Documents Groups* grid and select the group you want to assign your new document to.
- Click the *Add New* option in the *Documents* group.
- Move to the *Document Name* field and type in a descriptive name for your new document.
- Move to the *Document Type* area and select the type of document you are creating.
- With everything setup to your liking, move to and click the *OK* button.

Opening Documents for Viewing or Editing

To open a document for viewing or editing:

- Move to the *Documents Groups* grid and select the group your document belongs to by clicking on its name.
- Click on the *Documents* option under the *View/Edit* group.

You can also right click on a document file to bring up a popup menu with various options.

Documents Types

EDITOR DOCUMENTS

The Documents Editor is the word processor that we have included with our applications to create, edit and view text type documents. To learn how to use this power feature, please refer to the *Word Processor* chapter.

PICTURE DOCUMENTS

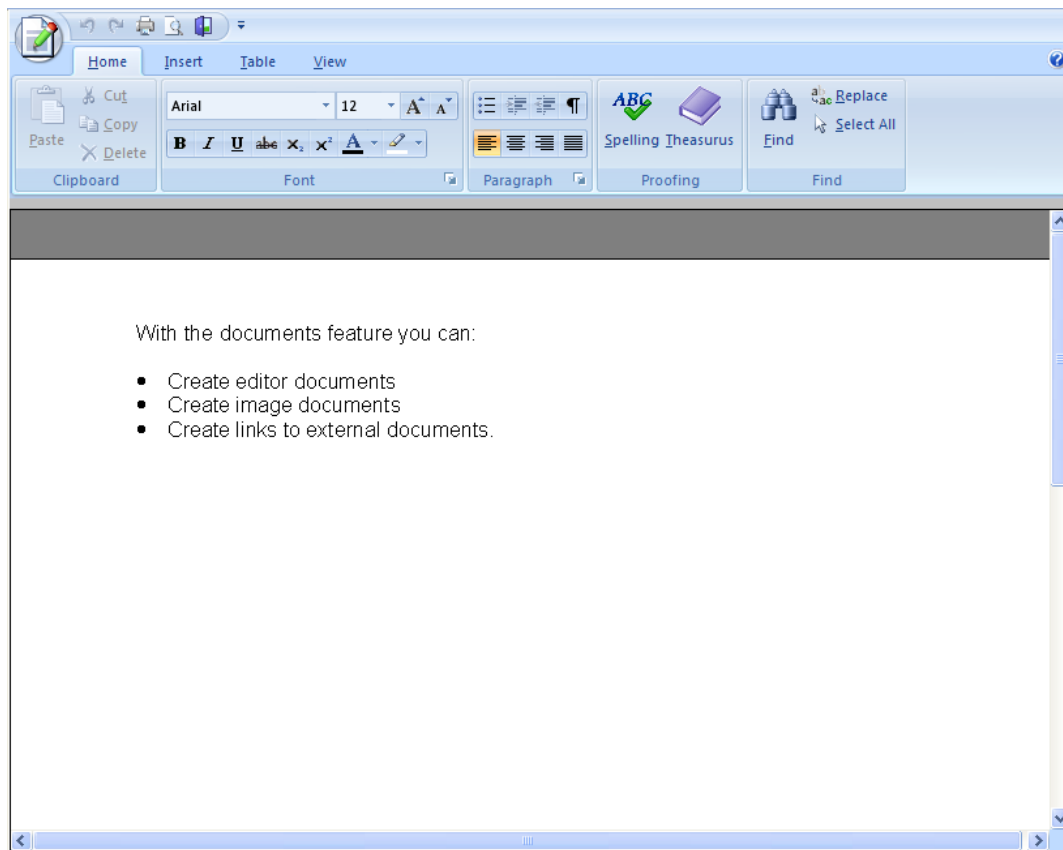
Picture documents make use of our Picture Viewer features. This feature is outlined elsewhere in this chapter.

ATTACHMENT DOCUMENTS

When you create this type of document, you will be greeted by a File Open type dialog. Use this dialog to browse to the file you want to link to. If you want to link to a relative path, such as a web-site, or file folder, click *Cancel* to the *File Open* dialog. Next an Input box dialog will appear. Type in the path of the file, web-site or whatever in the space provide and click *OK*.

Word Processor

The word processor that we have included with applications is used to create, edit and view text type documents. This is a feature rich word processor and we will be outlining its features and function next. The Word Processor has been included as both a standalone feature and as part of the Maintenance Documents feature.



For instructions on using this powerful feature, please click F1 or the Help icon in the right hand corner of the ribbon to access the help file, with full on-line instructions.