Getting Started Guide
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Introduction

The Maintenance Connection software was designed from the ground up not only to utilize the latest technology, but be able to adapt to your specific business practices. With Maintenance Connection, you have the freedom to choose how to integrate the software into your organization to fit your specific needs. The software provides the ability to track and assign work orders, generate purchase orders manually or automatically, maintain asset details for an entire organization, and download reports from anywhere in the system. We thank you for your interest in Maintenance Connection and look forward to building a relationship with you and your organization by aiding in your maintenance management efforts.

About This Guide

This “Getting Started” document will guide you through the software you have purchased and will give a high level overview of how the three applications and various modules work together. We will first introduce the three applications and explain how each module functions. Next, we will explain how the user interface provides an easy-to-use method for entering data and managing work orders and purchase orders on a daily basis. Then, in Chapter 4, we will take a step-by-step tutorial on setting up the application to be ready for use. Finally, there is a brief guide that will explain some of the more advanced features of the Maintenance Connection application.
How Do I Use Maintenance Connection?

This section shows how the Maintenance Connection software will make the job of a Work Order Manager more efficient by demonstrating a typical day in the life of a Work Order Manager.

A Typical Day in the Maintenance Department

It’s Monday morning and you sit down at your desk with a cup of coffee about to begin another week of work. You start your computer and log on to your personal Maintenance Connection home page. On the welcome screen, you see a summary of work orders, projects, pending memberships, scheduled maintenance, and inventory levels for each repair center in the organization. You notice that there are five new work order requests submitted over the weekend using the Service Requester application. You click the link and see two new maintenance requests needing to be tended to on the first floor of Building-A. Using the Work Manager, you see that John Williams is not assigned any work today, so you assign him the job. The status history is updated and now you can track any changes to the new work order. The person who originated the request then logs on to the Service Requester and notices that the request has been assigned and the status has changed from “Requested” to “Issued”. You print the Work Order List report to make sure that you assign all work to be completed for the week. Using either the Work Manager or Work Order Module, you assign all remaining work orders to fill each employee’s (or contractor’s) work schedule. You have two options: you can either print each employee’s (or contractor’s) work orders for them or when they arrive to work they can log on to Maintenance Connection and access their work orders for the week. They can view or print Work Orders that you have designated for each job. As the work is completed throughout the day, tools and inventory usage is tracked and entered into the application.

Later that morning, John Williams calls and says he is not feeling well and will need to go home for the rest of the day. John has three incomplete jobs, a total of four hours, which need to be finished today. Using the
Work Manager, you notice that Joe Smith has five hours free because he has completed his tasks early. You take John William’s jobs and cut and paste them to Joe Smith’s work list so they will get done in time.

From your Maintenance Connection home page, you notice four inventory items needing to be reordered. By clicking on the **Generate Purchase Orders** link, you see the inventory items that have fallen below restock levels. You generate the purchase orders you need and print out the cleanly formatted purchase orders that you customized last week for your organization’s purchasing department.

Around lunchtime, your boss sends you a memo asking you to announce a company-wide update meeting next week. This memo needs to be dispersed to your workers in the Physical Plant Repair Center. You return to Maintenance Connection and, using the **Bulletin Module**, copy and paste the memo and set the active date to this Thursday and repair center to Physical Plant Repair Center. All of your employees at the Physical Plant Repair Center will see the bulletin as soon as they log on to Maintenance Connection.

After lunch, you sit down at your desk, noticing that two new prospective members have logged on and requested access to the application. One is a “requester” and the other is an outside contractor. Clicking on the **Approvals Needed** link, you approve both of them for access. One of the employees that requested access is already in your labor list, so you attach the new member.

Your employees return from the days work with their updated work progress sheets and you update the system. After a long day made easier with an online maintenance management system you leave the office and head home. Although you don’t like to bring your work home, your boss calls you from his cell phone and asks you what items are on PO #2003 because he needs to order some parts before the next day. You then access the Maintenance Connection application from your home computer using the same username as at work, and email him the **Purchase Order Report** for PO #2003.
The Basics

This section will give you a brief overview of each Maintenance Connection module and guide you through how the user interface provides an easy-to-use method of entering and maintaining your maintenance data on a daily basis.

Before you begin using the Maintenance Connection software, it is important to recognize that Maintenance Connection is a web-based application that can be accessed from any computer in the world with a web browser. Within the application, you have access to all modules including Asset Tracking, Work Order Management, Purchase Orders, Preventative Maintenance, Procedures, Tasks, Repair Centers, Shops, Labor, Requesters, Crafts, Training, Members, Access Groups, Accounts, Categories, Projects, Inventory, Stock Rooms, Tools, Tool Rooms, Failures, Classifications, Specifications, Companies, Contacts, Documents, Bulletins, and a whole suite of reports. These modules are accessible by clicking ‘Open’ from the Work Order Manager Toolbar (below).
Minimum Computer Requirements

The Service Requester application of the Maintenance Connection software requires a minimum of PII with 128 megabytes of memory using Microsoft Internet Explorer 6.0+ or Netscape 6.2 and at least a 56K Internet connection.

The Work Order Manager application of the Maintenance Connection software requires a minimum of PIII with 256 megabytes of memory using Microsoft Internet Explorer 6.0+ and at least a 56K Internet connection. A high-speed Internet connection is recommended for Work Order Manager to ensure the most efficient work process.

Maintenance Connection Applications

There are three main applications in the Maintenance Connection system. They are the Service Requester, Maintenance Reporter and Work Order Manager. It is important to note that access to Work Order Manager includes access to the Maintenance Reporter. However, the Maintenance Reporter has been separated to allow some users to have access only to the Maintenance Reporter.

SERVICE REQUESTER

Service Requester allows users to request and report maintenance problems. Examples of users are internal employees, tenants, or outside vendors/contractors. This application allows a user to request maintenance for specific assets within an organization (defined by the Work Order Manager). They also have 24/7 access to this application to track the status of their maintenance requests in real time.

MAINTENANCE REPORTER

Maintenance Reporter is an application that accesses only the reports feature of the Work Order Manager. It is designed for executives or those who may not need access to the Work Order Manager, but would like to download data and reports on an on-demand basis.
WORK ORDER MANAGER

Work Order Manager is the core Maintenance Connection application. It is designed for maintenance employees and managers to track work order progress, schedule work orders, manage purchase orders and inventory, and track asset maintenance costs. The Work Order Manager application also has built-in access to the Maintenance Reporter application.

Work Order Manager Modules

ASSET TRACKING

Assets are locations and equipment within your organization. With the intuitive hierarchy view of your organization's assets, you can easily view the location of each asset, and add new assets or locations when necessary. With the search and filter options, you can quickly find an asset and view the maintenance history or work in progress. The Asset Module also allows you to clone assets to speed up the data entry process in building the asset tree. Once the asset tree is defined for your organization, you can drag assets directly to work orders.

WORK ORDER MANAGEMENT

Work orders are maintenance requests for either corrective or preventive maintenance. The Work Order Module is the heart of the system where you have access to a list of all work orders with filter controls to display only the ones you need. In one place you can manage the work order through the different status codes of Requested, Issued, (On-Hold), and Closed. The Work Order Detail screen shows a photo of the piece of equipment or building and the assigned labor crew. The Assignments Tab allows you to see the employees or contractors assigned to do the work.
**PURCHASE ORDERS**

Purchase orders may be printed with a list of line items, to deliver to the purchasing department. With the Purchase Order Module, you have the ability to quickly build purchase orders or requests depending on your business process need. Purchase orders may then be printed or emailed to a vendor. As parts are received, inventory levels are updated.

**PREVENTATIVE MAINTENANCE**

Preventive Maintenance is scheduled maintenance procedures that can be set up to run on a routine basis. Select from a library of over 300 built-in Preventative Maintenance schedules or create your own to automatically generate work orders on a daily, weekly, monthly, yearly, or based on target meter levels. Preventive Maintenance Schedules can be automatically generated by the system or you can specify the number of days in advance and receive an alert message on your home page.

**PROCEDURES**

Procedures are “canned” work orders that contain various tasks and costs (labor, materials) for routine work orders. Procedures are used primarily for preventive maintenance work orders where the required tasks do not change from one job to the next. Select from a library of 300+ standard maintenance procedures or create your own for maintenance employees or contractors to follow when completing work orders. Attach a procedure to a work order and the line items will be automatically included within that work order.

**TASKS**

The Tasks Module is a section to store common tasks which can then be quickly included in the task section of a work order or procedure. Use the tasks to specify reusable line items that should be accomplished for a maintenance job.
REPAIR CENTERS
Repair centers are physical locations within the facility where work requests are managed. Whether you are a single-site or multi-site organization, you may use repair centers to divide data into logical groups. For example, you may have a Physical Plant “Repair Center” and an IT “Repair Center”. The Physical Plant Repair Center takes care of the facility and maintenance of all non-IT assets. The IT Repair Center handles the maintenance and repair of only IT assets. Each repair center can designate a separate stock room and tool room for maintaining inventory and usage levels.

SHOPS
Shops belong to repair centers and provide for grouping of data. Specify a shop on work orders and preventive maintenance schedules. Shops may exist externally or internally within the organization.

LABOR
The Labor Module stores all internal and contract labor available to perform maintenance. The Work Order Manager application includes the individual’s photo for easy recognition of your staff. From here, you can view contact information, set individual labor rates, view monthly work schedules, set work schedule/time off and keep track of employee’s training and certification.

REQUESTERS
Use the Requesters Module to manage those who have access to the Service Requester application where they can submit new maintenance requests. Maintenance Connection allows an unlimited number of requesters in the system.
CRAFTS
In addition to adding labor, the application also allows you to define crafts. When creating a work order, you can specify crafts and estimated hours per craft required to complete the job, without assigning specific maintenance employees. You can also specify pay general labor rates for individual crafts.

TRAINING
You can set up specific training certifications such as CPR and contractor licensing to track your employees’ training status. This feature also allows you to track training cost data that may be extracted using the Maintenance Reporter.

MEMBERS
Members are individuals in the system who have access to one or all of the three Maintenance Connection applications. You can use the Members Module to manage those employees who have access to the Maintenance Connection suite of applications. You can specify which application they may access and what level of access (Access Group) they have. The Members Module is where you will approve new members who request access to the software.

ACCESS GROUPS
The Access Groups Module is where you define security settings for groups of members. You can distinguish access by module and/or repair center. If you would only like a group to have access to three or four modules, you can specify this. If you want to limit a group of people to read-only access, you would use the Access Groups Module to do so.
ACCOUNTS
The Accounts Module allows you to designate supplier, department and company accounts in order to track budgeting. You can specify a budget for individual accounts and, using the Maintenance Reporter, download a report of all account access for any period of time. Work Order labor and materials can also be charged to an individual account.

CATEGORIES
The Categories Module is used to manage general categories that are used throughout the system to organize items such as procedures, repair centers, projects, tools and companies.

PROJECTS
The Projects Module allows you to manage a group of work orders and track the status and costs of the entire project. The Schedule Info section allows you to assign start and end dates for a group of work orders to help guide the process from beginning to end.

INVENTORY
Track inventory usage and manage your on-hand, available, and reserved inventory items in the stock rooms. You can also use this module to view all locations where an inventory item has been used. The vendor tab shows you where you can reorder the item when it is time to reorder.
STOCK ROOMS
The Stock Rooms Module allows you to manage all stock rooms within the organization. You can set specific shipping and billing information for each stock room.

TOOLS
Manage all of your organization's tools and track where and when each tool is being used with the Tools Module. Monitor which tool room each tool is located in and when they are checked out for use.

TOOL ROOMS
With the Tool Rooms Module, keep a list of all tool rooms in the organization and the current list of tools in stock at any given time.

FAILURES
Use the Failures Module to define an unlimited number of failure types, which you can assign to failed work orders when necessary. You can then create reports that show how many work orders failed and for which reasons.
CLASSIFICATIONS
Use the Classifications Module to put both assets and inventory into classes. This will allow you to organize your data more efficiently. Set up specifications and associated materials and labor for a classification. Then, when you create a new asset and assign a classification, that information will automatically be entered for the new asset.

SPECIFICATIONS
Each asset and inventory item may have specific technical/descriptive details that need to be tracked. The Specifications Module allows you to keep a list of data for each asset and inventory item. You can track details such as wattages, ohms, volts, oil capacity and kilograms. Specifications can be tied to classifications, which allow a user to fill in the specification data when assigning a classification to an asset. This is also referred to as “nameplate data”.

COMPANIES
You can use the Companies Module to manage the companies your organization interacts with (such as vendors and manufacturers), save company details, payment/shipping details, contact information and view all company labor.

TENANTS
You can use the Tenants Module to manage the tenants who occupy your buildings. Maintain contact information and assign people within their organization who can submit new maintenance requests. Assign a tenant to a work order and create reports to see how many work orders each tenant has requested over time.
DEPARTMENT
Set up your departments in the organization to track maintenance on a department level. Use the Departments Module to track detailed information about contacts, requesters and location of each department. Associate a department with a work order and track work order costs per department.

CONTACTS
Track your contacts using the Contacts Module. This module gives you the ability to enter your contacts and keep them in one place for easy access and reference.

DOCUMENTS
The Documents Module allows you to create and edit task sheets, area maps, policies/legal documents and operating procedures. Using the built in HTML editor, you can easily make changes to the documents. This robust document tracking system gives you one place to manage all of your company’s documents. You may also specify a link to an external file either on the web or your local network. Link these documents throughout the system to items such as work orders, procedures, labor, tools, repair centers and stock rooms.

BULLETINS
The Bulletins Module is a small, but very useful piece of the Maintenance Connection application. Here you can contact a large group of people with the click of a button. Create bulletin messages for an entire organization or for individual repair centers, which will display when users log on to the system.
REPORTS (MAINTENANCE REPORTER)
Reports may be accessed from the toolbar section of the application. This is a powerful feature of the application from which you can pull data from any where in the system to generate a customizable report to view, print, email or download. With the email function, you can maintain a list of commonly emailed contacts using the built-in address book, and send HTML-formatted reports directly to their email inbox. You can also download the report to either .XML or .CSV file, which can be imported to Microsoft Excel. Using the Maintenance Reporter, you can also create batch reports, which can be run with the click of one button. This is useful for generating and printing sets of daily or monthly reports.

You also have the option to customize reports. This system reports come with the option to specify criteria on the fly. You may change which fields to display, how the report is grouped / sorted, or change the layout of the report using the Setup Report feature. Some reports cannot be customized, as they are system reports. Maintenance Connection also provides a suite of professional services if you would like a custom report added to your system.

OPTIONS
Options may be accessed by clicking the Options button from the toolbar. This section allows you to automatically generate work orders and purchase orders, upload many images at a time, create surveys, manage holidays, update asset meters, reset labor hours and much more. With the Options section, you can also access and change system preferences, set records displayed per page, maintain organization-defined work days and specify whether to refresh the page after updating a record.

Logon
Once you have signed up with Maintenance Connection, you will receive a username and password, which will grant you access to the Work Order Manager. Each time you access the software thereafter, you will use that information to access your organization’s maintenance data. All users (requesters, managers and reporters) will access Maintenance Connection through the same login screen with a different user ID and password. Once logged in, they will be prompted with the applications to which that they have access.
**User Interface Definitions**

**FILE MENU**
The File Menu is the very top row of clickable drop down menus in the Work Order Manager. You will have access to a File, View and Help options from this menu. It is important to always use the menu to exit the system by clicking on File > Exit.

**MODULE WORKCENTER**
In the Module WorkCenter you can view and navigate through item details. The tab format organizes the data into groups. Refer to the ‘Entering Data’ section for more information on methods of inputting data. If you double-click anywhere in the Module WorkCenter, the Module Explorer will display the data records for the current module. Double-click inside a lookup field and the Module Explorer will display all available data for that field.

**TOOLBAR**
The Toolbar is just below the File Menu and displays buttons such as New, Open, Explore, Reports, Options, Home and Back. The ‘New’ button will prompt you to create a new item. The default new item is the current module you have selected in the Module WorkCenter. The ‘Open’ button will prompt you to open a specific module and will display the appropriate WorkCenter in the Module WorkCenter.

Hint: Double-click in the empty space of the Module WorkCenter to bring up the current module’s records in the Module Explorer.
Use the ‘Explore’ button to toggle between explore view and split-view mode. In explore view mode, the Module Explorer is displayed across the whole screen with an expanded dataset and the Module WorkCenter is hidden. You can then use the ‘Split-View’ button to return to the split data view.

The ‘Reports’ button pops up a dialog with all accessible reports. The initial reports displayed will be based upon which module you currently have selected.

‘Options’ gives you a list of routines and quick procedures to update a lot of information at a time. In the Options dialog, you may also set system preferences.

The ‘Home’ and ‘Back’ buttons are used for navigating the system and work much like the native browser buttons. ‘Home’ will take you to the screen displayed when you first log in and ‘Back’ will navigate you to the page that was previously viewed.

The toolbar will also display ‘Save’ and ‘Cancel’ buttons when you change a record in the Module WorkCenter. It is very important to click the ‘Save’ button before navigating to another record or module. The system will prompt you to save the data before moving to another record.

**MODULE EXPLORER**

In the Module Explorer, you can search for a record and select it to view in the Module WorkCenter. There are a couple of buttons in this section that should be addressed.

- The refresh icon will refresh the current view in the Module Explorer.
- The workcenter icon will bring up the appropriate WorkCenter in the Module WorkCenter.
- The filter icon displays the current criteria filter. This is important to establish how the Module Explorer search results are being filtered.

**TABS**

Maintenance Connection uses tabs throughout the system to organize fields within the Module WorkCenter and Module Explorer. Be sure to click on each tab to make sure you do not miss any important information.

**RIGHT-CLICK MENUS**

Maintenance Connection makes good use of space and takes advantage of all possible methods of accessibility. It is important to know that you can right-click with the mouse to display an action menu in many areas of the system. Some of those areas include right-clicking on a record in the Module Explorer, right-clicking inside a lookup fields and right-clicking on data rows in module lookup dialogs.

**HELP**

If there is ever a question about what a field is used for or how to accomplish a task, there are a couple of methods to obtain help. First, most field labels* are hyperlinks that open an editable help text dialog that explains the function of the field. It is fully customizable, so if you would like to leave comments about the field for the next user, you may do so. Secondly, from the file menu you can choose the help option which
gives several different methods of obtaining help with the application.

* NOTE: For field label help, you will left-click on the field label to bring up the help text. However, for checkbox fields, use the right-click button to display the help text.

**Entering Data**

Along with the standard form dialogs in the Module WorkCenters, you will also have the ease-of-use of drag-and-drop data entry, data lookups, adding on the fly, and data validation.

**DRAG AND DROP**

A feature that streamlines data entry is the ability to drag and drop records. From the Module Explorer, you can drag a record to a corresponding field in the Module WorkCenter. When you move a record over a field that allows you to drop in, the cursor will change to let you know you can drop. When you drag over a field that does not allow a drop, the cursor will change to a circle with a line through it. An example of this would be to drag an asset from the Asset Module Explorer to the Asset/Location section of a Work Order.

**DATA LOOKUPS**

There are several types of data lookups that can be accessed by clicking on or next to a record. You can enter data via a table lookup, module lookup, calculator or calendar. For table and module lookups, you can bypass the data lookups by entering the ID of the lookup value. These lookups simply provide an easy way to access your data. The with an orange line under it indicates that it is a Module Lookup.

**Table Lookup**

Table Lookups will display a small blue window (right) with the options that are available for the selected field. You can add and edit these lookups on the fly by clicking the very last row called ‘new’ and entering your values. The edit icon allows you to edit a lookup value. Use the icon to remove a data item from the lookup. Each row has a Code and Description; it is best to enter the Code without spaces and a short Description to identify the data value. Access a Table Lookup by clicking on next to a field.
Module Lookup
Module Lookups will display a large pop up dialog with search criteria on the left and data values on the right. You can filter the search by using the search fields at the top, clicking on the alpha tabs above the search results or selecting a specific record type on the left of the search results. From the module lookup, there is typically a button to add a new record on the fly. Access a Module Lookup by clicking on next to a field.

Calculator
For numeric values, you can either enter them manually or use the built-in calculator feature, which can do simple mathematical calculations. Click the ‘=’ to enter the data in the selected field. Access the Calculator by clicking on next to a numeric field.

Calendar
For date values, you can either enter the date manually in mm/dd/yyyy format or use the built-in calendar feature to select a date. Select a date to enter the data in the selected field. Today’s date will display in yellow. Access the Calendar by clicking on next to a date field.

ADD AS YOU GO
The ‘add as you go’ feature will prove to be very useful when entering new records. As you input new records, you will need to either attach existing records or create new ancillary records. For example, if you are creating a new asset, you will need to assign an account, repair center, shop, vendor, etc. If the vendor for the asset does not exist, you can add the vendor without losing the changes to the new asset. The same situation may apply to the new vendor. If, while adding the new vendor, the vendor account does not exist, you may add the account on the fly without losing any changes. This could virtually be an endless cycle of creating on the fly, but the beauty of the system is that you will always get back to where you started and will never lose any changes.

INLINE VALIDATION
As you enter data, the system will validate on the fly. If you always use the data lookups to enter data, there will never be a time when the system finds flawed data. However, when entering data manually, this system will check the entered values for validity and display a message if there is a problem.
**USER-DEFINED FIELDS**
In each module, there are nine user-defined fields which you can use to store any type of data you wish choose. The user-defined fields may be accessed by using the tabs on the bottom of the Module WorkCenter. The fields are made up of five text fields, two date fields and two checkboxes, and can be used to store any extra miscellaneous information. The user-defined fields may also be used as criteria for reports.
Step-By-Step Setup

This section will walk you through the initialization process of the Maintenance Connection application.

There are a few steps that are very important in preparing the application to get it ready to use in your organization.

1: Set Up Repair Centers

Add your repair centers using the repair center module. A repair center is an individual site set up to perform maintenance tasks. This will define your organization’s structure including your asset hierarchy. All of the modules rely on repair centers as a definition of criteria.

2: Set Up Crafts and Labor

Add crafts, maintenance employees, and contractors that you will use to assign to work orders. You can begin building their weekly work schedule and add photos and contact information of each of your employees.

3: Set Up Access Groups

Define several groups for access to Maintenance Connection. Then, when they access the application you can approve their membership and grant access to the appropriate access group.

4: Set Up Accounts

Using the Account module, add your accounts for access from all across the system. Keep in mind that you will also be able to add these on the fly.

5: Build the Asset Hierarchy

You will spend a lot of time accessing Asset Hierarchy. It is important to plan ahead and think about how you would like your organization’s assets to be organized. A typical hierarchy will look something like this:
Organization > Site > Buildings > Areas > Equipment (computers, desks, phones). Be sure to use an intuitive and consistent method of entering asset IDs.

6: Set Up Preventative Maintenance

You will need to set up any preventative maintenance (PM) procedures you are already aware of for your organization. Set up the routine schedule for which maintenance tasks will need to be performed. Under the ‘Automation’ tab, you can also specify whether the system should automatically generate work orders for this PM.

7: Set Up Stock Rooms

Next, you will need to begin setting up your inventory management system. To do this, begin by adding all your organization’s stock rooms to the system. You can specify the location and shipping/billing information for each new stock room.

8: Add Inventory Items

Begin entering your inventory items for each stock room. Once set up, you will be able to use the system to manage and track inventory levels, and use the Purchase Order module to generate purchase orders to restock low inventory levels.
How-To Guide

This section will walk you through several specific tasks using your Maintenance Connection application.

**How to Set Up Preventive Maintenance**

Preventive maintenance can be set up to create work orders on a recurring basis.

1. Open the Preventive Maintenance Module from the Module Explorer.

2. Click the ‘New’ button from the Toolbar. Your screen should look like Figure 5.1.

3. Enter an ID and Name for the new preventive maintenance. The ID field must be unique and may not contain spaces.

4. Click on the Schedule Tab and set an interval for how often you would like the PM to create work orders. The Schedule Tab allows you to pinpoint a day or interval of days within any given amount of time. For a PM that should create work orders once per month, select ‘Monthly’ in the Schedule Tab and select ‘Every 1 month’.

5. Click on the Procedures Tab and click the ‘Add’ button. Select a procedure from the list of procedures. If you do not see the procedure for this preventive maintenance, then click the ‘New’ button at the bottom and follow the instructions on how to create a new procedure (next page).

6. Select a procedure, enter the interval and click ‘Apply’. Example: If you set the schedule to be a monthly reoccurrence, an interval of 6 would create a work order using that procedure every 6 months.

7. Using the Assets/Location Tab, select the equipment that will use this new PM. Use the asset hierarchy lookup to select all of the equipment that will use this PM schedule. The system will figure out when the next date the PM will run and display the date on the screen.
8. In the Automation Tab, determine whether you would like the system to generate work orders automatically or display a notification to manually create the work orders.

9. Click the ‘Save’ button on the Toolbar and notice that the new PM has been added in the Module Explorer.

How to Create a New Procedure

Preventive maintenance can be set to create work orders on a recurring basis.

1. Open the Procedures Module from the Module Explorer.

2. Click the ‘New’ button from the Toolbar.

3. Enter a Procedure ID and Procedure Name. All of the other fields on the Details Tab (Reference Target Hours, Type, Priority, etc) will take precedence when this procedure is used on a work order.

4. Click on the Tasks Tab and enter all tasks required to complete this procedure.

5. Click on the Costs and enter labor, materials and other costs. NOTE: If you assign an individual (as opposed to a craft) as a labor estimate, that person will automatically be assigned the job when a procedure is used on a work order.

6. If any attachments need to be included with this procedure, use the Attachments Tab to add them.

7. Click the ‘Save’ button on the Toolbar and notice that the new procedure has been added in the Module Explorer.

How to Run a Report

Reports can be created to view a snapshot of your date at any moment in time. Reports are vital to understanding areas improvement

1. Click on the ‘Reports’ button from the Toolbar.

2. Select the report you would like to view and click ‘Run Report’.

3. **Report Criteria.** You will be presented with a dialog to modify the report criteria. You may filter the report data by entering values for the criteria fields. If you do not see the filter you need, click on ‘More…’ at the bottom for a list of available filters. Click ‘Apply’ to view the report.

   NOTE: The Report Criteria will only display if the ‘Default Criteria’ checkbox is not checked on bottom left of the main reports window.
4. The report will be displayed on the screen and you may use the ‘Email’ or ‘Export’ buttons to extrapolate the data from the report.

How to Automatically Generate Work Orders

There may be times when you would like to generate work orders that are due or generate work orders in advance.

1. From the toolbar, select the Options.
2. Click on ‘Generate Work Orders’.
3. From this dialog, you have the option to select a repair center, specify dates.
4. Click the Apply button.

How to Automate Purchase Orders

You may want to generate a list of purchase orders based upon certain criteria.

1. From the toolbar, select the Options.
2. Click on ‘Order Inventory Items’.
3. From this dialog, you can specify whether to generate POs for stocked items or to direct issue items.
4. Select specific items to evaluate or select a set of stock rooms to generate the necessary purchase orders.
5. Click the Apply button.