

# GETTING STARTED

With

# Maintenance Coordinator CMMS Software

# WELCOME

The following set of slides will try to outline the installation, navigation and setup of Maintenance Coordinator Software onto your computer

# Installation of Maintenance Coordinator



Insert the CD into  
your computer  
CD-ROM Reader



Allow the Auto Run Feature to  
start the setup application.  
Follow on screen instructions and  
let the program install itself

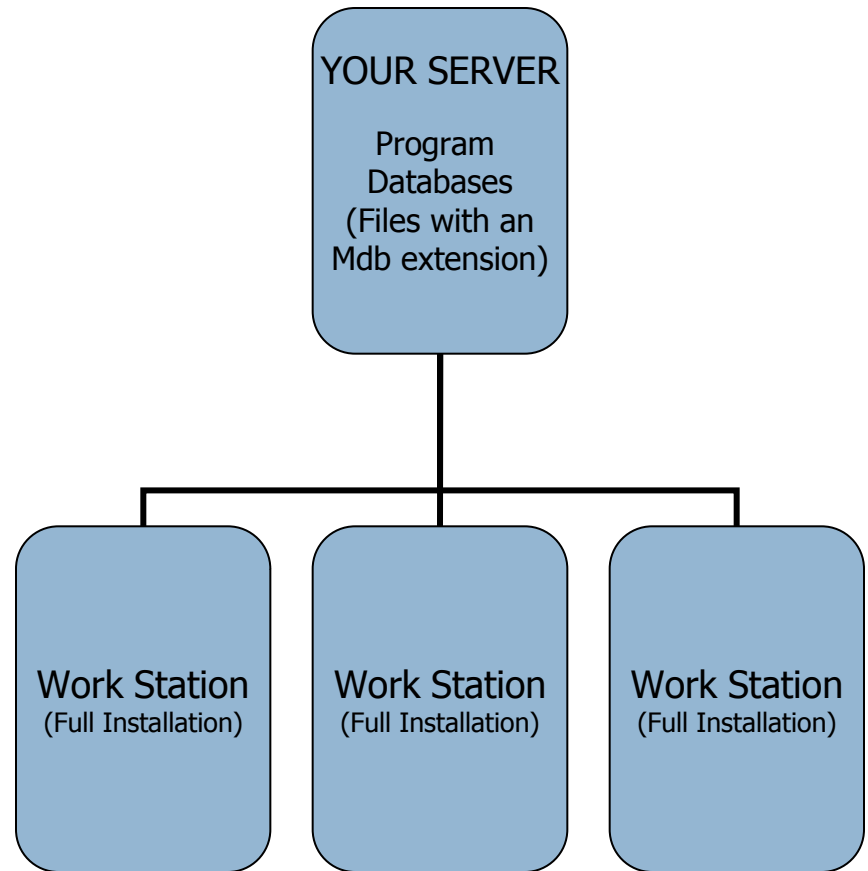


Insert the Software Activation  
media and activate the software

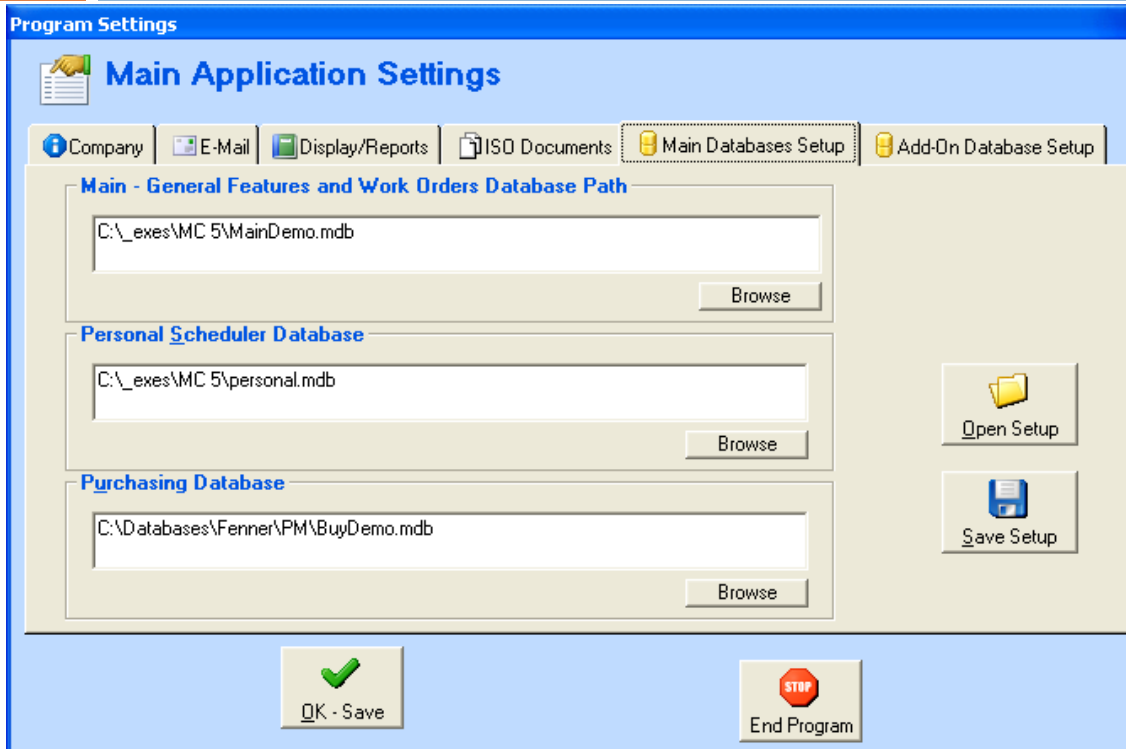


# Network Installation

- ❑ Install the program on each Client or workstation.
- ❑ Copy only the databases to your server.
- ❑ Go to the Admin menu, select Databases and Set Database Paths option.
- ❑ Point to your databases on the Server.



# Database Settings



Your database setting should look something like the picture shown.

You can also use the Browse buttons found here to help locate and setup your database paths.

The program uses Microsoft Access databases for data storage.

Please note that if a Network License is not purchased, the program will only allow the database to reside on the C: drive.

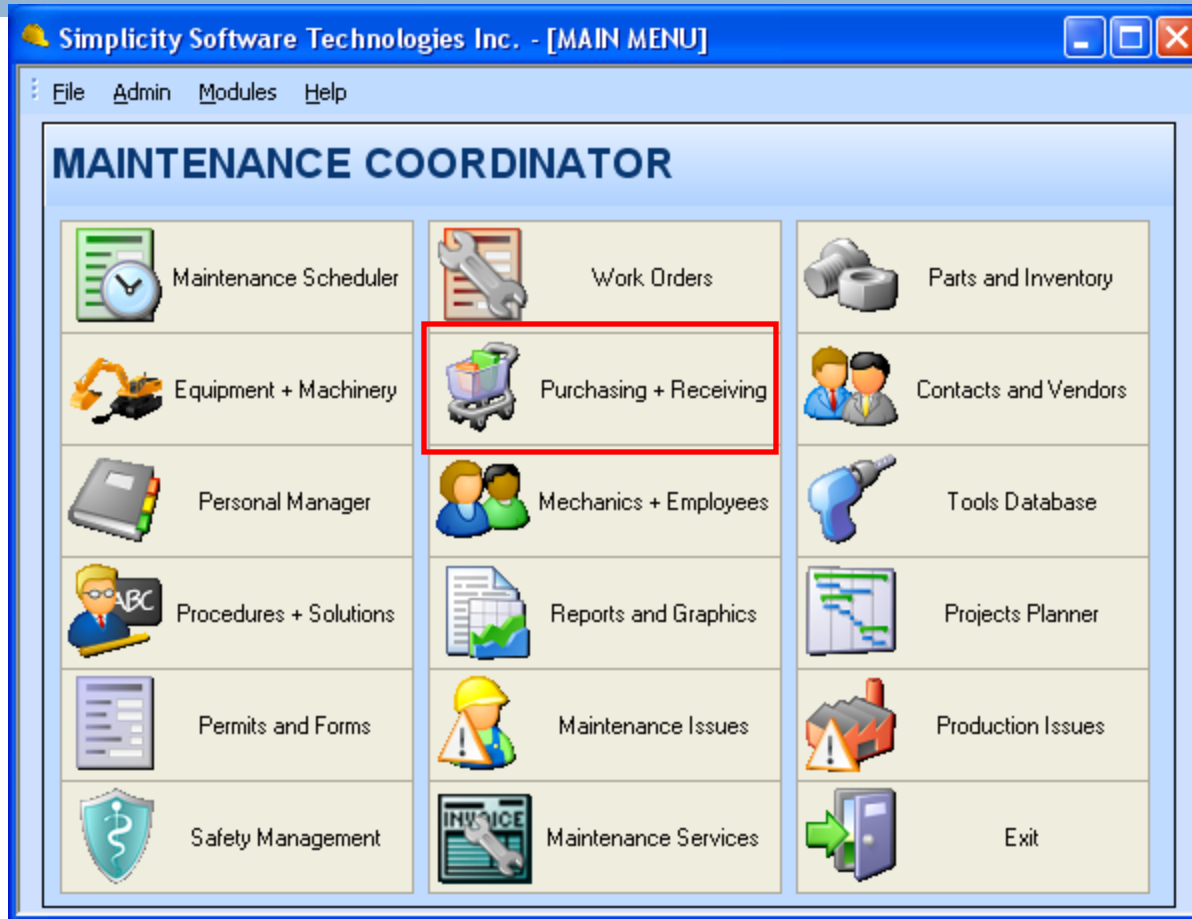
# Navigating with Maintenance Coordinator

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There a couple of different ways of getting around in  
Maintenance Coordinator and these will be outlined  
next

# THE MAIN MENU



You can move between the different modules of Maintenance Coordinator by simply clicking on a button on the Main Menu screen.

# DROP DOWN MENUS



You can move between the different elements of Maintenance Coordinator by accessing drop down menus and then selecting options found there.



# SHORTCUT BARS

The screenshot displays the 'Maintenance Coordinator - [Parts and Inventory]' application window. On the left side, there is a 'Shortcuts' panel with several options: 'Inventory', 'Current Part', and 'Support Options'. The 'Inventory' section includes 'Open Inventory Lookup Screen', 'Check Part Out from Inventory', and 'Sort by Under-Stock Items'. The 'Current Part' section includes 'View or Edit Part's Notes' and 'View or Set Part's Picture'. The 'Support Options' section includes a wrench and screwdriver icon. The main window area shows a 'Parts and Inventory' title bar, a menu bar with 'Home', 'Go', 'Groups', and 'Reports', and a toolbar with icons for 'Part Lookup', 'Part Checkout', 'Clipboard', 'Records', 'Print', and 'Search'. Below the toolbar, there are tabs for 'Lookup View', 'Details View', and 'Group Assignments'. A 'Sort By' dropdown is set to 'Part No', and a 'Quick Find' search box is present. The main data area contains a table with the following columns: Part ID, Description, Part No, Manufacturer, Location, Account, and Qty. The table lists 12 items, including various valves, tubing, relays, gauges, pumps, grease guns, paper dispensers, oil, switches, and motors.

	Part ID	Description	Part No	Manufacturer	Location	Account	Qty
1	BRAS00001	1/4 Brass Ball Valve	25BR-BAL-VAL01	Easy Tube	Main Storeroom	General Mainten	
2	TUBI00002	1/4 Tubing 90 degree Elbow	25TUB_EBL	Easy Tube	Main Storeroom	General Mainten	
3	TUBI00003	1/4" Tubing Coupling	25TUB-COUP-116	Easy Tube	Main Storeroom		
4	TUBI00001	1/4 Tubing Tee	25TUB-TEE	Easy Tube	Main Storeroom	General Mainten	
5	PDT100001	2PDT 120VAC Relay	2PDP120-PB	Potter and Bloor			
6	TIRE00001	Tire Pressure Gauge	99PREGU09				
7	CIRC00001	Circulating Pump	CIR009PUM	Aces Motors	BIN-889		
8	COMP00001	Compact Grease Gun	GREGUN0456				
9	MULT00001	Multi-roll Paper Dispenser	MULROLL-99867	Easy Wipe	Closet 4N		
10	OIL_00001	Oil, 10-40W	OIL1040C	Atlantic-Goodfie	Main Storeroom		
11	MANU00001	Manual Reversing Switch	REVSUW-776	Allen Electric	BIN- 99 Drawer 4		
12	MOTO00001	Motor, 1/2 HP, Single Phas	USA1201P12	USA Motors	Rack 1, Bin 45		

You can move between the different options within a module by accessing items found in shortcut bars found on the left side of many modules windows.

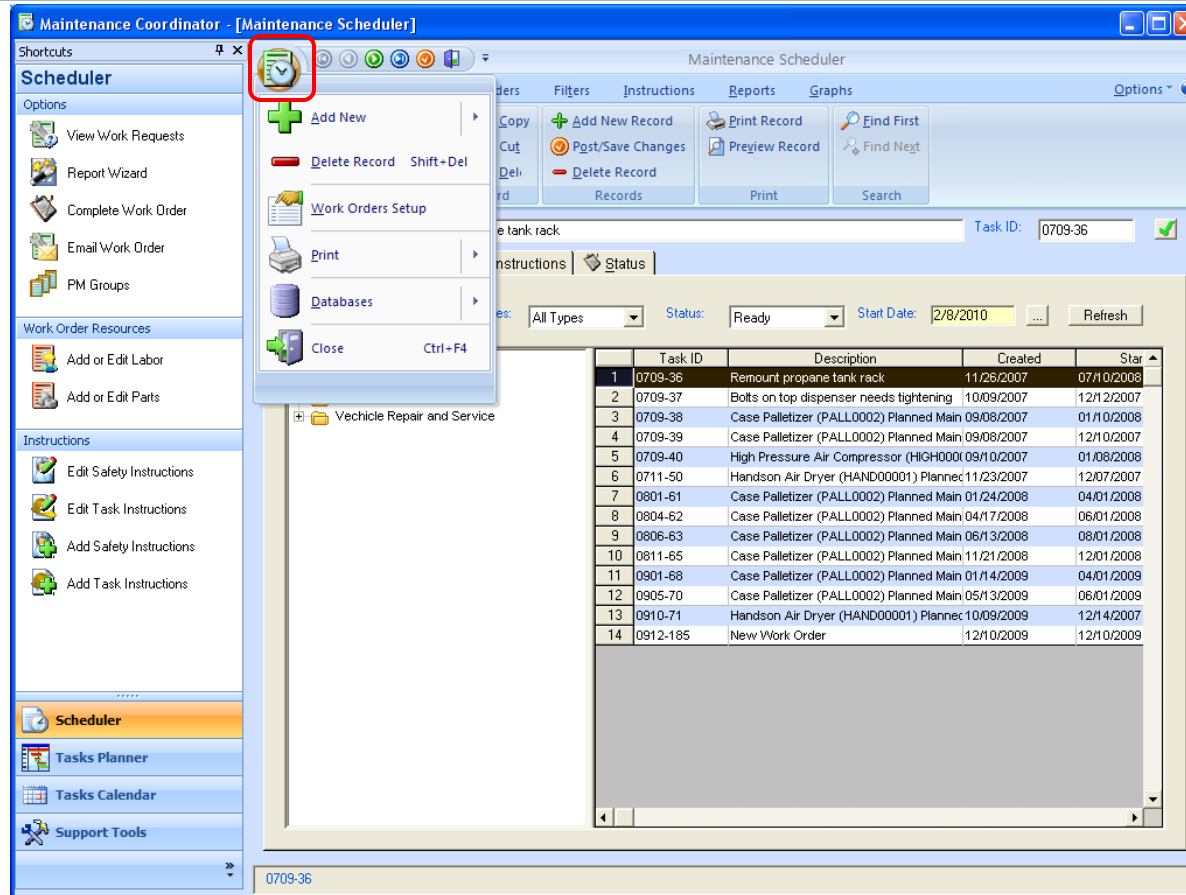
# RIBBONS

The screenshot displays the 'Maintenance Coordinator - [Equipment and Machinery]' application window. The interface features a ribbon menu at the top, a left-hand navigation pane, and a main data table. The ribbon menu is highlighted with a red border and includes tabs for 'Home', 'Go', 'Asset', and 'Reports'. The 'Home' tab is active, showing groups for 'Meters Collection', 'Clipboard', 'Records', 'Print', 'Search', and 'Equipment'. The left-hand navigation pane contains sections for 'Current Asset', 'Equipment Meters', and 'Support Options'. The main data table is titled 'Equipment and Machinery' and has columns for 'Reference', 'Description', 'Serial No', and 'Manufacture'. The table contains 9 rows of equipment data.

	Reference	Description	Serial No	Manufacture
1	PALL0002	Case Palletizer	8678436905	Stack It Right Mfg
2		Compressor #3		
3	FORK00001	Forklift Truck	000123366765	Cats Equipment
4		Forklift Truck	000123366765	Cats Equipment
5	HAND00001	Handson Air Dryer		
6	HIGH00001	High Pressure Air Compressor	88700064	Bellis and Derve
7	INJE00001	Injection Molder	88852688543	Sheperd Machin
8	KRAN00001	Krane Air Handler	7784329654	Krane Mfg
9	FACI00001	Main Facilities		

The application Ribbons are a replacement for your normal menus and toolbars and is where you will access the majority of available features.

# Application or Module Button



As part of new Ribbon interface you'll find the Application or Module button that's replaces the old File menu. Just click on it to open.

# Main Program Settings



Earlier in this presentation we showed how to set up your databases, now we would like to show you some additional settings that you can setup now.

To get started please do the following:

- Open the Admin menu and select the Program Settings... option.

# Company Information

**Program Settings**

**Main Application Settings**

Company | E-Mail | Display/Reports | ISD Documents | Main Databases Setup | Add-On Database Setup

**Company Information**

Company: ABC Maintenance Co  
Address: 12345 Main Street  
Address:  
City, State, Zip Code: West Side CA 90206  
Phone No: 788-234-4455  
Fax No: 788-234-4456

**Company Logo**

MAINTENANCE COORDINATOR

Browse  
Clear

OK - Save End Program

On the Company tab you can setup the following:

- Your Company information such as address and phone numbers
- Company Logo

Information from this screen is used with Purchasing and Work Order documents

The Company Logo accepts bitmap images (bmp) that should be scaled to about 1 inch by 1 inch. Use the Browse button to import your image.

# Email Information

Program Settings

## Main Application Settings

Company | **E-Mail** | Display/Reports | ISO Documents | Main Databases Setup | Add-On Database Setup

Use Outlook or Outlook Express for Outgoing Mail

Outgoing E-mail Setup (Other than Outlook)

**User Information** (E-mail From Information)

User Name:

E-mail Address:

**Server Information**

Outgoing mail server (SMTP):

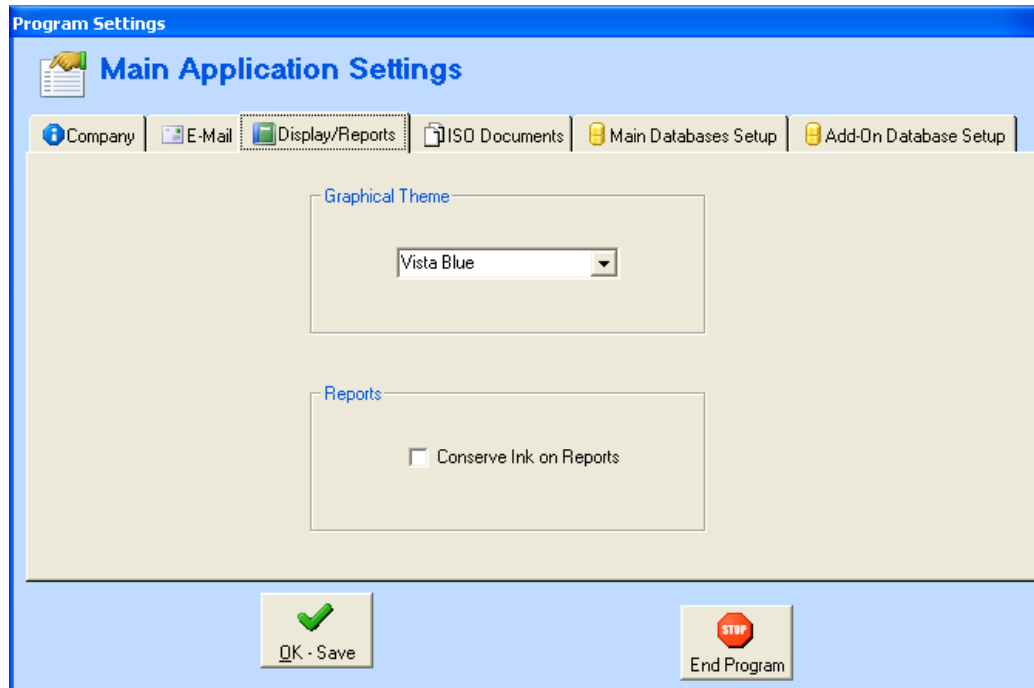
On the Email tab you can setup the following:

- Your out going email server or application.

Information from this screen is used with the Auto Work Orders email feature and for contacting support.

To use Outlook for out going mail click on the Use Outlook check box. To use your company's smtp type server, you must fill in the other section. Using the server setup allows use with almost any email configuration including Outlook and Notes.

# Display and Report Settings



On the Display/Reports tab you can setup the following:

- The graphical theme used by the application.
- Set the Conserve Ink option.

Information from this screen is used throughout the program.

The Conserve Ink on Reports option does just that. Instead of having full colored bars on many of the reports, it converts them to just outlines, thereby saving you ink or toner.

# ISO Documents Settings

The screenshot shows a software window titled "Program Settings" with a sub-tab "Main Application Settings". The "ISO Documents" tab is selected in the navigation bar. A checkbox labeled "Use ISO Control Numbers" is checked. Below this, there are two sections for control numbers:

- Work Order Documents Control Numbers:**
  - PM Types: PM0001
  - Standard Types: PM0002
- Purchasing Documents Control Numbers:**
  - Requisition: REQ0001
  - Purchase Orders: PUR0001

At the bottom of the window, there are two buttons: "OK - Save" (with a green checkmark icon) and "End Program" (with a red stop sign icon).

On the ISO Documents tab you can setup the following:

- ISO document control numbers

Information from this screen is used for Work Order and Purchasing documents



# Main Program Settings

The image shows two overlapping software dialog boxes. The top one is titled 'Work Orders Settings' and has tabs for 'General', 'View Options', 'Recurring WO', 'Standard WO', 'User Fields', and 'WO Types'. The 'General' tab is active, showing fields for 'Next Work Order Number' (163) and 'Days in advance to generate work orders' (30). There are three checkboxes: 'Allow the Automatic Printing of Work Orders' (checked), 'Allow Past Due Notification of Work Orders' (unchecked), and 'Generate New PMs for In-Service Equipment Only' (unchecked). An 'OK' button with a red checkmark is at the bottom.

The bottom dialog box is titled 'Purchasing Setup' and has tabs for 'Company', 'General', 'View Options', 'Defaults', 'E-Mail', and 'PO Approval'. The 'General' tab is active, showing fields for 'Next P.O. Number' (9) and 'Decimal places to show for purchase items' (2). There are three checkboxes: 'Do Not Use Auto Prefix' (checked), 'Use Account Information items' (checked), and 'Use Unit Type Info' (checked). Below these are five unchecked checkboxes: 'Conserve Ink/Toner on Printed Documents', 'Warn about Duplicate Printing of Documents', 'Allow the Auto Refresh of Purchase database', 'Add Part Number column to documents', and 'Print User Defined Fields on Purchase Orders'. An 'OK' button with a red checkmark is at the bottom.

We have just outlined for you some of your initial program settings. There are actually many more settings you need to look at. Many of the modules, such as the Scheduler and Purchasing have their own settings that you need to setup. These are normally found under the module's File menu.