SIMPLICITY
Software Technologies Inc.

MAINTENANCE COORDINATOR

ADVANCED COMPUTERIZED MAINTENANCE MANAGEMENT SOFTWARE

VERSION 7.x

PROFESSIONAL AND ADD-ON FEATURES

USERS GUIDE

MAINTENANCE COORDINATOR SYSTEM

Issues Tracking

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Software Technologies Inc.

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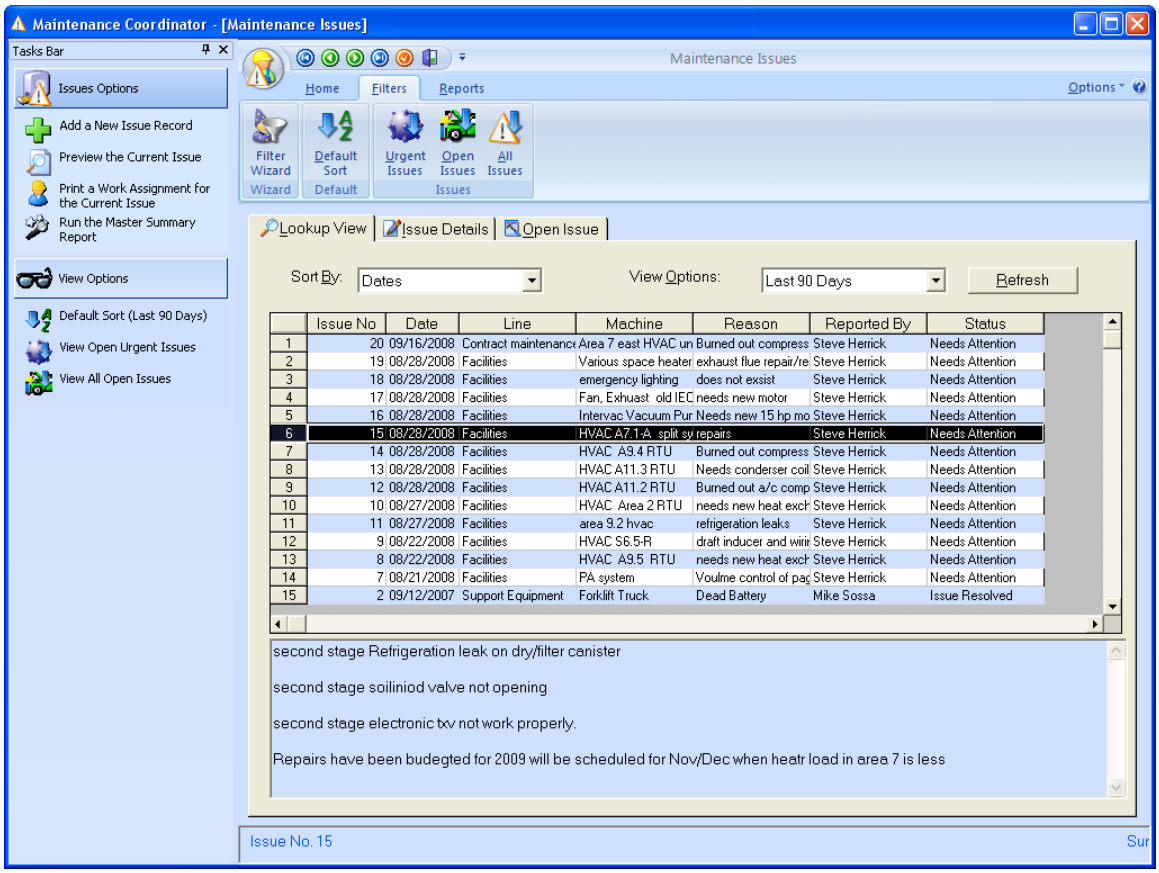
Issues Module Overview

With the *Issues Log* you can keep a complete record of what all your production and maintenance people are doing. The way this system was planned is to make a computer available for your employees. As they encounter issues on the floor (or elsewhere in the plant), they come to this computer and log in whatever they may have encountered. In this fashion, other personnel, on perhaps other shifts, can review reports and gain insight on how things have been running. A person that has knowledge of what was done before they became involved with a specific issue will be much better prepared to resolve that issue.

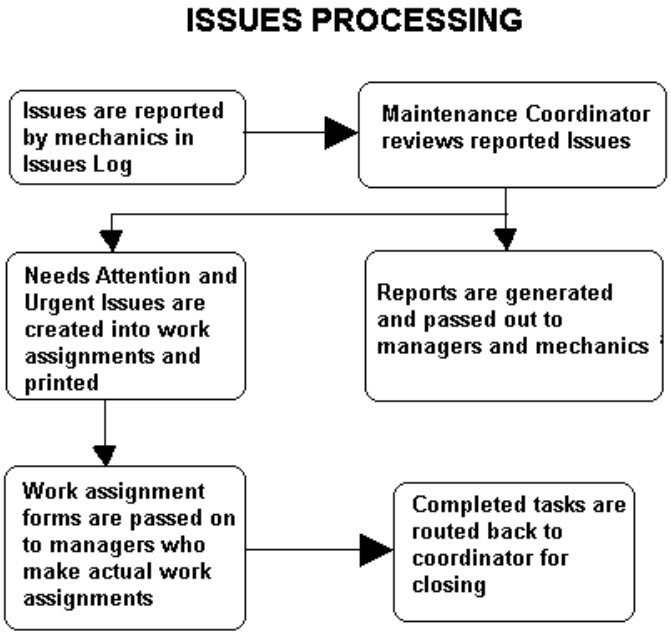


If used right and in a consistent manner, this module can be proven to be a great industrial maintenance tool. After just a few weeks of data entry, you will be able to pin point problem areas, and recurring issues. This will help guide you into the proper direction, allowing you to place resources where they are most needed, making the work that is performed return greater results.

You may be saying to yourself right now that your employees don't have the time to be sitting in front of a computer all day. Well, this program doesn't

require them to. If they go and log in their issues as they are encountered, they should only need a couple of minutes per issue, and this time shouldn't even be noticed, but the benefits gained will surely be noticed. We have also made it so these employees can reuse the same data over and over by providing quick entry routines, decreasing the time needed for data entry.

The following flow chart illustrates a way the Issues log can be used to benefit your maintenance department and production in general.



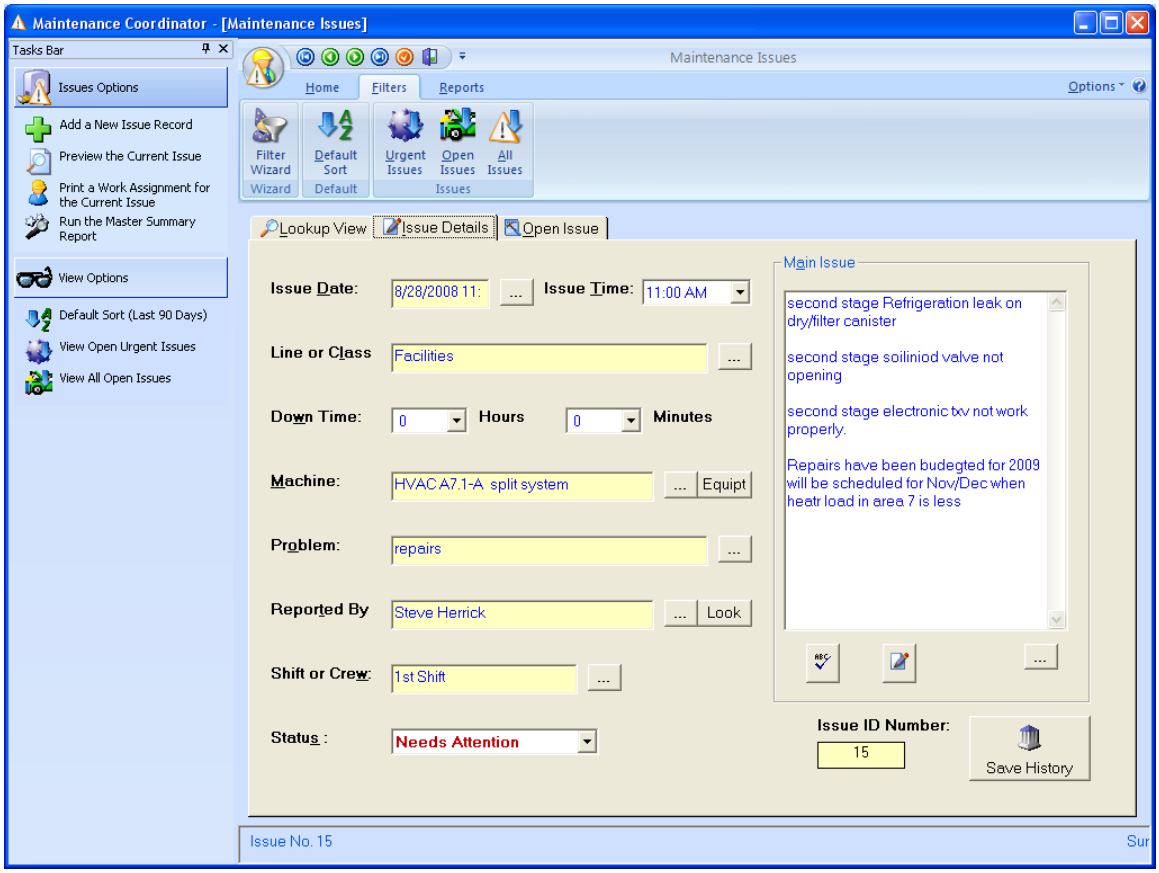
The above format will also work just as well for your production line personnel.

Differences between Maintenance and Production Issues

The procedures outlined in this chapter work equally well for both Maintenance and Production issues. In fact these two modules are actually the same module, just sorted differently. It would be perfectly acceptable to have all your employees use just one type of reporting. But many have found it useful to keep the two separate for a variety of reasons. The choice is totally yours and your organization.

Entering a New Issue

This exercise will step you through the process of entering a new issue into the program's database.



1. Click on the *Home* tab in the ribbon and select the *Add New Record* option.
2. If you are not already there, move to the *Issue Details* tab by clicking it.
3. Move to *Issue Date* and click on the … button just to the right of this field. This action will bring up a calendar that will allow you to change the date of this field. Select or click on the appropriate date from this calendar and then click the *Select Date* button.
4. Move to the *Issue Time* drop down and select the closest time as to either when the issue first occurred or when you are reporting it. Select this time by clicking on the arrow attached to this field, and then mouse clicking on the appropriate time from within the list.
5. Next you need to assign the issue to a selected production line. This, as with the majority of the fields located here is very important for reporting purposes. To assign this issue to a production line or system,

move to the *Line or System* field and click on the … button located to its right. This will bring up the *Line Names* selection screen.

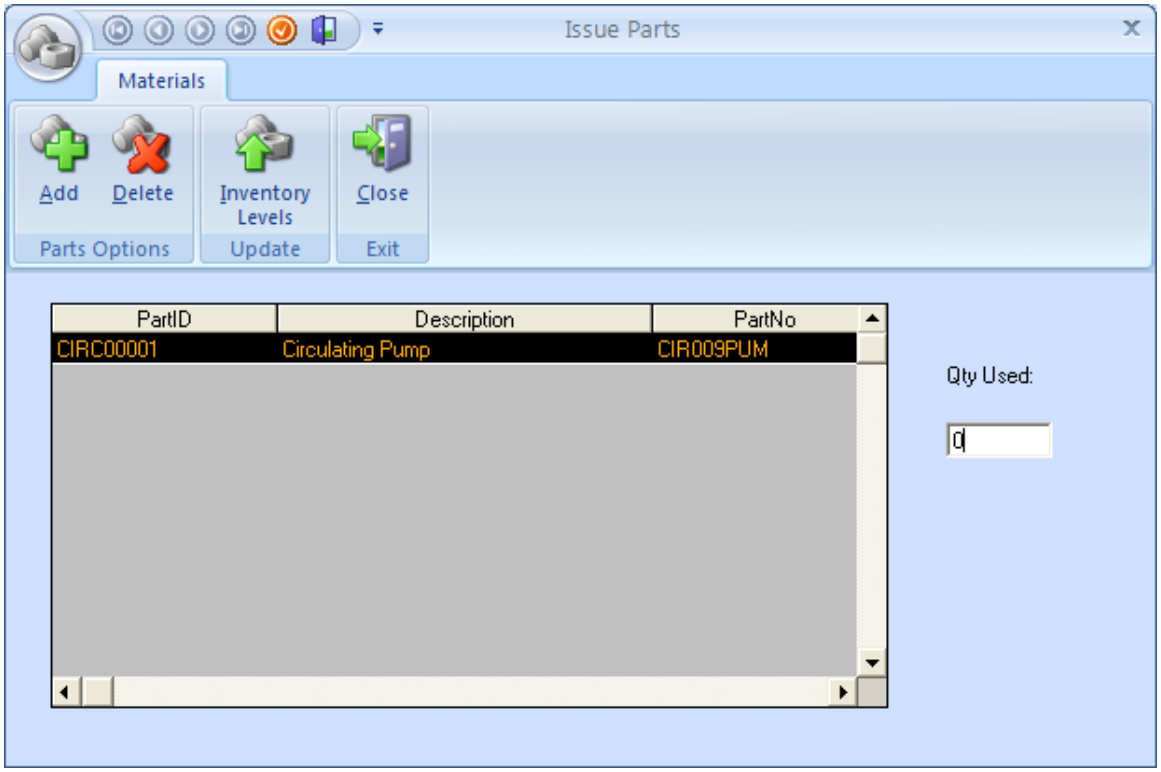
6. Move to the list of line names and select the production line of your choice by clicking it. Next move to and click the *Select* button to insert the selected name. For this example, lets say we entered *Line One.*
7. Move to the two *Down Time* drop down list boxes, and select the appropriate down times, if any. For this exercise move to the *Hours* drop down and select 1. Next move to the *Minutes* and select 15. This would equal 1 hour and 15 minutes, or 75 minutes, depending how you want to look at it.
8. The next item that needs attention is the *Machine* field. <u>It's very important</u> that this field is entered prior to moving to the *Problem* field. This is because the database will be sorted, and will change by the Machine you enter. To change the machine, move to and click on the … button to the right of the field.
9. Next move to the list of machine names and select the description of your choice by clicking it.
10. Next move to and click the *Select* button to insert the selected name into the *Issues Details* screen. For example, let's pretend that we entered *Conveyors* as our machine.
11. Move to the *Problem* field and click on the … command button to bring up a list of issues. Again this list will change depending on the machine you've previously selected.
12. Move to the list of issues and select the issue of your choice by clicking it. Next move to and click the *Select* command button to insert the selected issue description into the *Issues Details* screen. For example, let's say we choose *Gearbox* as our issue. When assigning issues you want them to be rather general in nature, for reporting purposes. You'll have a chance to be more descriptive in the *Issues Details* field.
13. Move to the *Reported By* field and click on the … button to bring up a list of names.
14. Move to the list of names and select the name of your choice by clicking it. Next move to and click the *Select* button to insert the selected name into the *Issues Details* screen. For example, let's say we entered your name.
15. Move to the *Crew or Shift* field and click on the … command button to bring up a list of possible choices.
16. Now move to the list of crews and select the crew name of your choice by clicking it. Next move to and click the *Select* button to insert the selected title into the *Issues* screen. For example, let's say we entered *Day Crew.*
17. The next step is to move to the *Issue Details* text box and type in any details you may have about the current issue. For example, type the following: *The gearbox lost all its oil and locked up.* Note: This field will accept up to 2,000 characters, which should be more than sufficient for most issues.

18. Next click on the small command button just to the right of the *Issues Details* field that has a picture icon of *ABC* and a checkmark. This icon will spell check the *Issues Details* field.
19. Next move to the Status indicator drop down and select the appropriate indicator that best describes the status of your recorded issues. Options here are as follows:
    - **Information Only –** Use this indicator to pass on information to other personnel or shifts. This may not really indicate an issue at all, but just a way to pass on valuable information to others. It is recommended that you use this indicator sparingly as it increases database size without really reporting an issue. Example: Machine went down because operator went on break.
    - **Issue Resolved –** Use this indicator to inform others that you were able to repair or resolve the reported issue. Example: Had a broken reflector on conveyor. Replaced, working fine now.
    - **Needs Attention –** This indicator would inform others that you were not able to fully resolve the issue and the issue needs further attention. Example: Oil leaking from the gearbox on the elevator. Could not find a new one to replace it with, so I added oil to it.
    - **>>URGENT ISSUE<< -** This indicator should be used for ITEMS THAT WERE NOT RESOLVED and need <u>immediate attention</u> to keep the machine running. If the issue has been resolved, or the issue just needs attention, do not use this indicator. Example: Could not repair the problem with the hoist. Machine is running, but faults out regularly, causing a lot of down time.

NOTE: Work Assignments (Work Orders) are easily created with *Needs Attention* and *Urgent Issues*, allowing you to keep up on these types of issues.

Parts Used

To record the parts used in the completion of an issue (Maintenance Issues Only).



- Select the issue by one of the lookup routines.
- Move to the *Open Issue* tab by clicking on it.
- Click on the *Issue Part Usage* button near the bottom right hand corner of the screen
- Click *Add* option in the ribbon.
- Move to *Group Name* grid located on the left of the screen and click on the group you believe your part would belong to. The grid on the right will be resorted by whatever group you select. You can also place a check in the *View All Parts* checkbox to view all parts, ignoring groups.
- Move to the *Parts List* grid, located to the right of the screen and click on the part of your choice.
- Click *Select* in the ribbon.
- Click in the *Qty Used* text box.
- Type in the quantity you used of the selected part in the completion of this issue.
- Repeat the above steps until you have added all parts and materials you used.

- If you wish to update your inventory levels, thereby reducing stock levels by the amounts recorded here, move to the *Update* group in the ribbon and select the *Inventory Levels* option.

Removing Parts and Materials from Issues

To remove a part from an issue:

- Move to the *Open Issue* tab by clicking on it.
- Click on the *Issue Part Usage* button near the bottom right hand corner of the screen.
- Move to the grid and click on the part you wish to remove.
- Click *Delete* option in the ribbon.
- Answer *Yes* to the prompt.

Printing the Issue's Material List

To receive a print out of the materials associated with an issue:

- Select the issue by one of the lookup routines.
- Open the *Reports* tab in the ribbon and select the *Parts Usage* option.
- From the preview screen, click *Print*.

Editing Issues

To change the contents of an Issue that has already been entered into the database, please follow these steps:

- From the *Lookup View* tab, locate the issue you want to edit from those listed. Move through these issues using the data control found in the toolbar, or use the scroll bar attached to the right of the list.
- Once you have located the Issue you want to edit, click on it to select it.
- Click on the *Issue Details* tab.
- Edit the issue in the same fashion as it was created. For more information refer to the section, *Entering a New Issue.*

Working with Open Issues

When an issue's status has been marked as either *Needs Attention* or *<<URGENT ISSUE>>*, the program treats these issues as open. With open issues you can have the program create *Work Orders* and *Work Assignments* forms for you.

Basically, a *Work Order* and a *Work Assignment* is the same thing. The difference is that a Work Assignment deals with a production issue, and should demand immediate attention. A Work Order on the other hand, could also be a production issue, but would generally not require immediate action.

There are three ways to turn an open issue into a Work Assignment, and these will be outlined next.

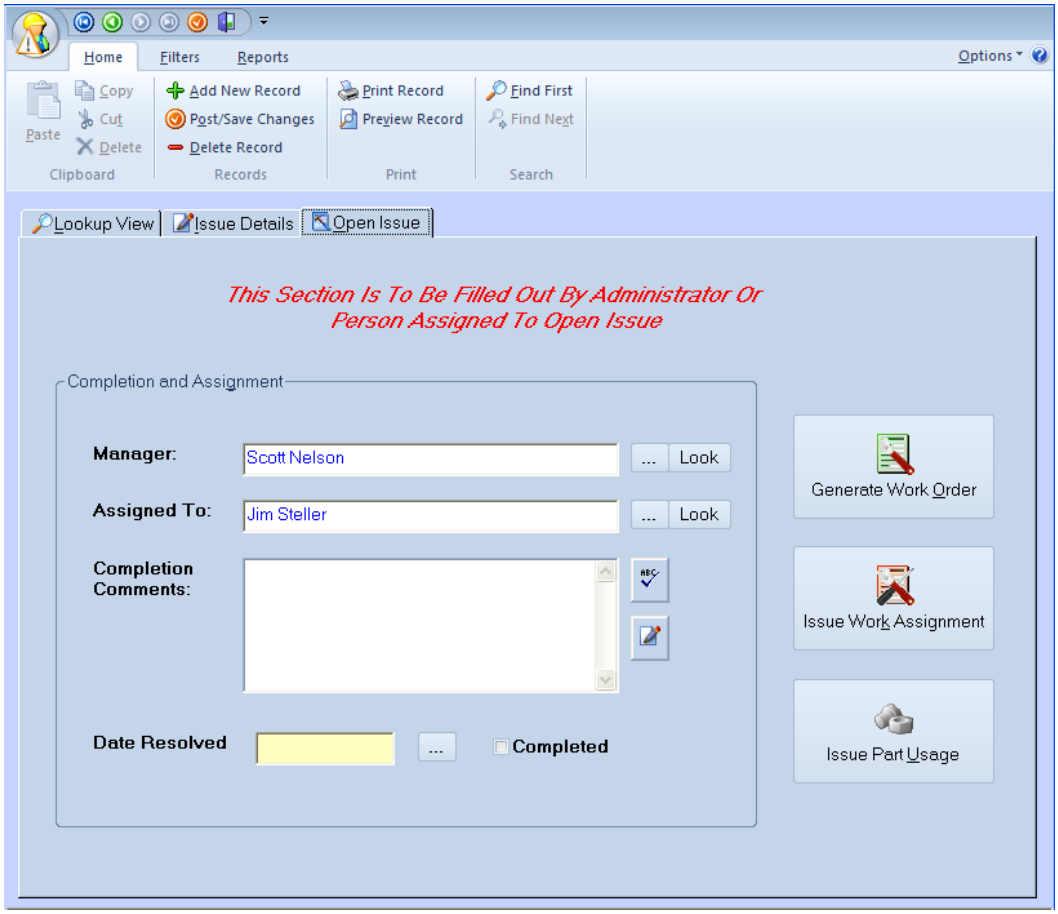
Method One

To generate a *Work Assignment* using method one, please follow these steps:

- Select the issue you want to create a work assignment for from within the *Lookup View* grid. You make the selection by clicking on the issues with your left mouse button.
- Click on the *Reports* tab in the ribbon and move to the *Assignments* group.
- Click on the *Work Assignments* option followed by *Current Issue*.
- The *Preview* screen will now load with the current work assignment form ready for printing.

Method Two

To generate a *Work Assignment* using method two, please follow these steps:

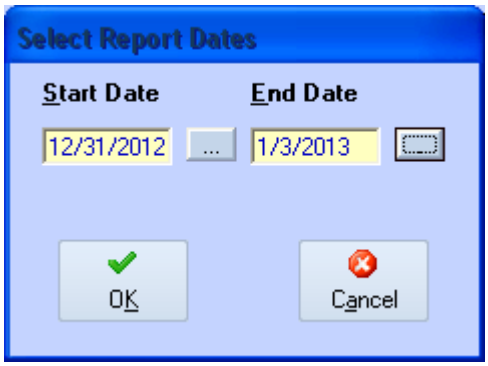


- Select the issue you want to create a work assignment for from within the *Lookup View* grid. You make the selection by clicking on the issues with your left mouse button.
- Click on the *Open Issue* tab.
- Click on the … command button next to the *Manager* field to call up the Quick entry screen for that field. Now select the manager of your choice from within the list by clicking on it.
- Click on the *Select* button to insert the manager's name into the proper field.
- Repeat the above two steps for the *Assigned To* field.
- Move to and click on the *Issue Work Assignment* button.
- The *Preview* screen will now load with the current work assignment form ready for printing.

Method Three

Method three deals with a date range of open issues. As one *Work Assignment* is created, you'll be prompted to continue on to the next issue that falls within the date range.

To generate a *Work Assignments* using method three, please follow these steps:

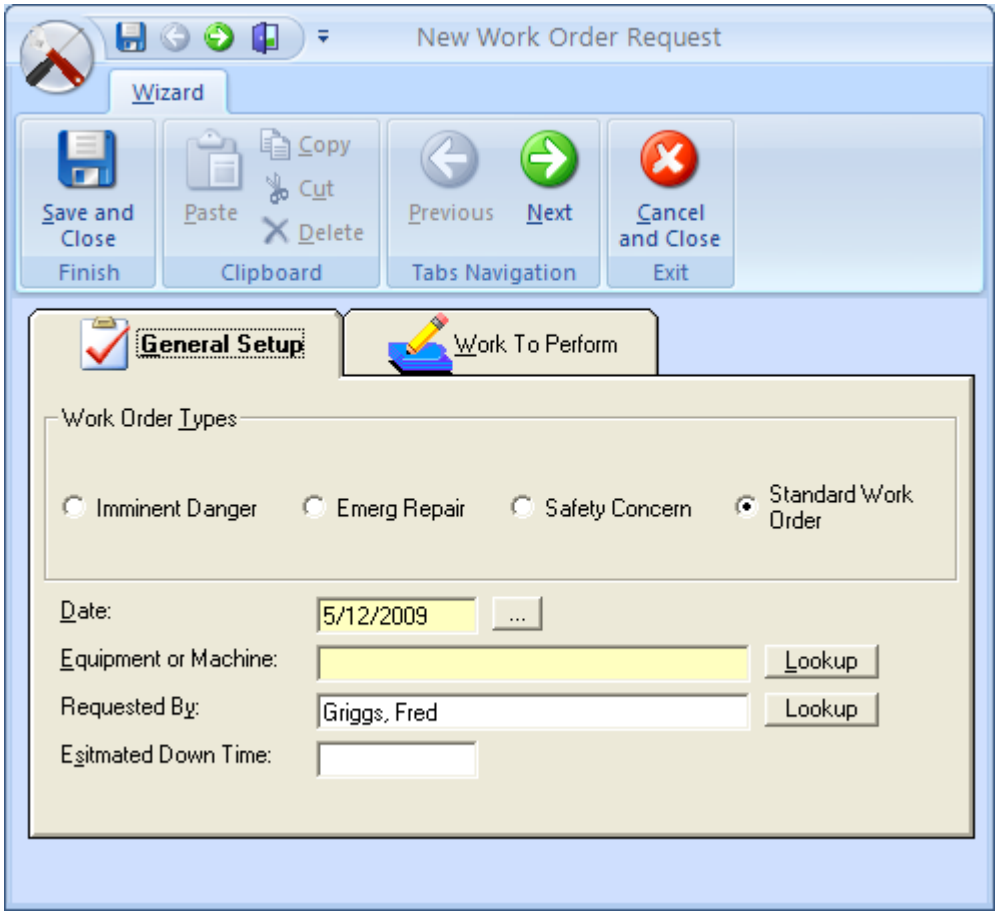


- Click on the *Reports* tab in the ribbon and move to the *Assignments* group.
- Click on the *Work Assignments* option followed by *Date Range*.
- When the date range popup appears move to the *Start Date* field and click the … button to bring up a calendar. Now select the starting date for your issues from within the calendar, and click the *Select* button.
- Next move to the *End Date* field and double click here to bring up a calendar. Now select the ending date for your issues from within the calendar, and click the *Select* button.
- Once the dates have been setup move to and click the *OK* button.
- The *Preview* screen will now load with the current work assignment form ready for printing.
- Print the report by clicking on the *Print* option in the ribbon.
- Move to and click on the *Close* button.
- If there is more than one open issue that fell within the selected date range you'll be greeted with a message box asking if you wish to continue on with the next issue. If you wish to continue click *Ok*, otherwise move to and click on the *Cancel* button.
- Repeat the top four steps until you have worked your way through all the open issues that fell within the selected date range.

Creating a Work Order from an Issue

Many issues are going to require the creation of a work order instead of a work assignment to correct the issue.

To create an issue work orders:

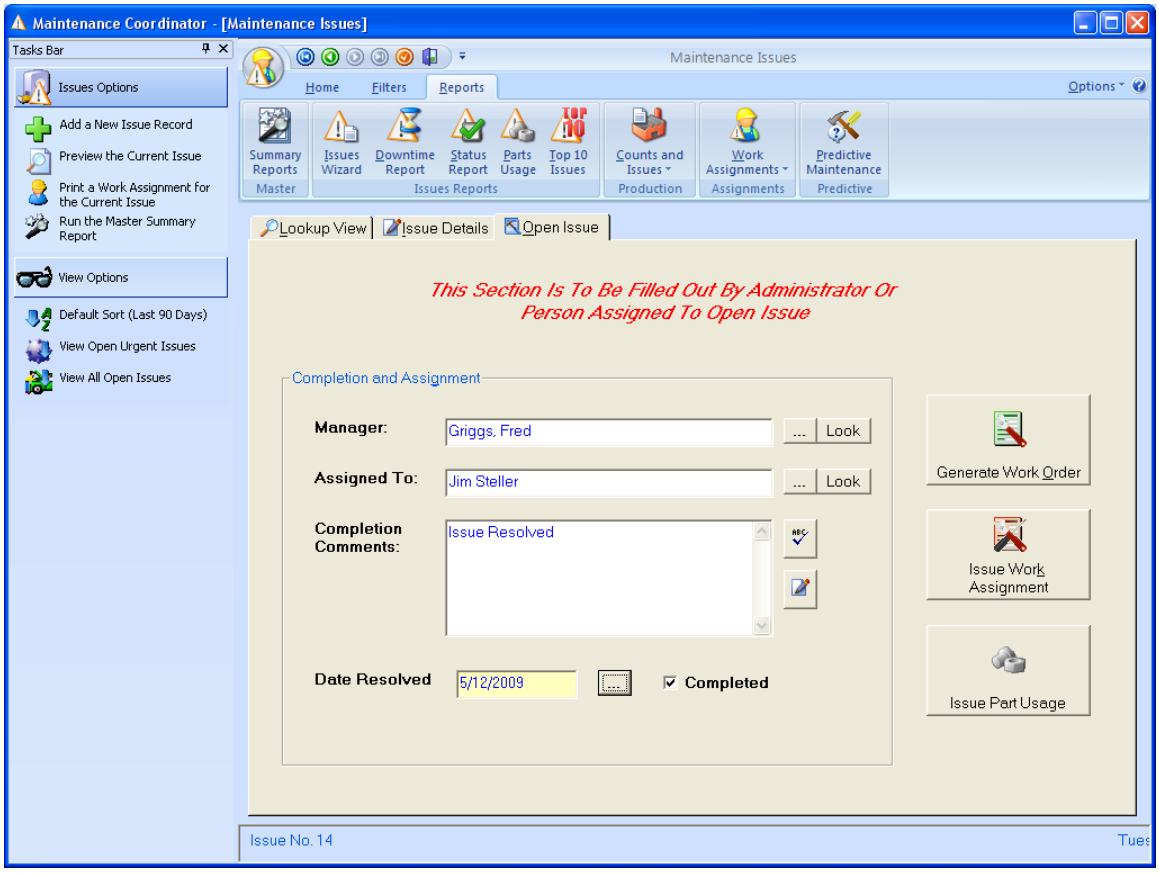


- Locate and select the issue that you want to create a work order from.
- Click on the *Open Issue* tab.
- Click the *Generate Work Order* button.
- When asked if you want to create a work order, click *Yes*.
- Move to the *Work Order Types* area and click on the option here that best describes the type of work order you're creating.
- Move to and click on the … button adjacent to the *Equipment or Machine* field. Select the name of the equipment you want to assign to this work order from within the grid.
- Click the *Select* option.
- Move to the other fields and enter the appropriate information.

- When you're done with this tab, click the *Next* button to move to the next.
- Edit the fields on the *Work to Perform* tab to your liking.
- Click the *Save and Close* option in the ribbon.

Closing Open Issues

Once an issue has been taken care of in one way or another, the issue needs to be closed out or marked as complete.



To close an open issue:

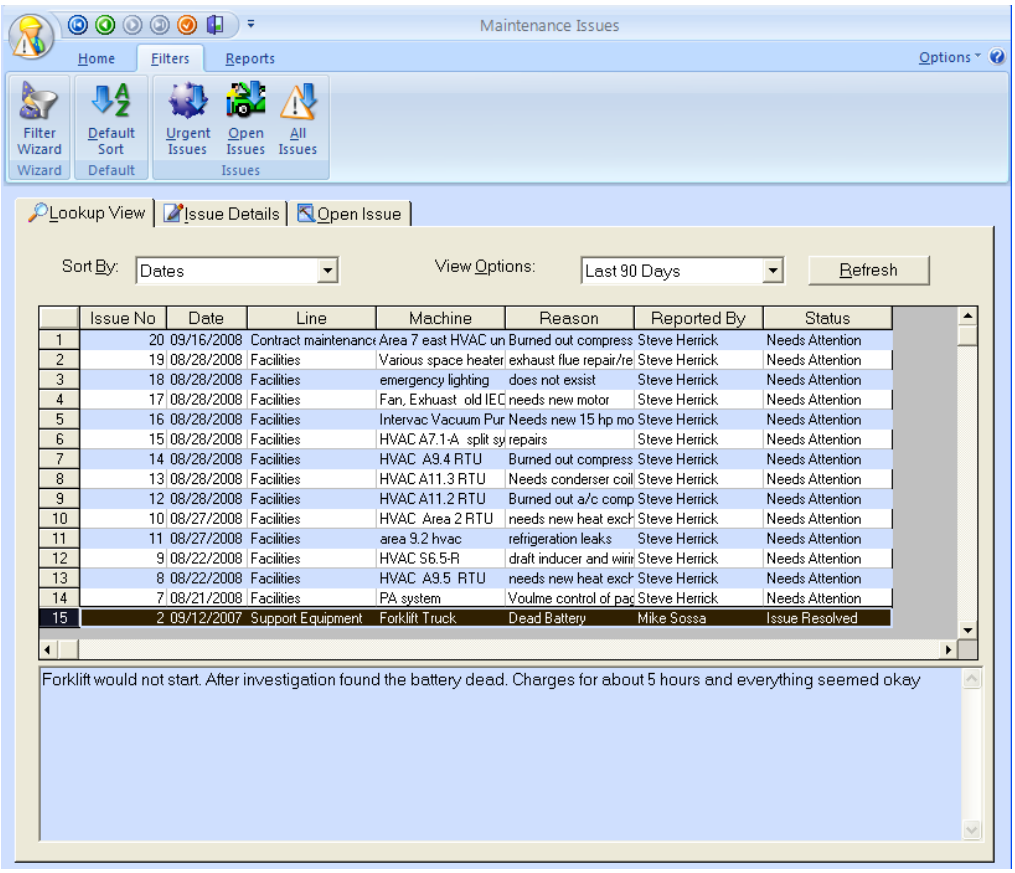
- Select the issue you want to close from within the *Lookup View* grid. You make the selection by clicking on the issues with your left mouse button.
- Click on the *Open Issue* tab.
- Move to the *Completion Comments* text box and record any information about the completion of the *Issue Assignment* you want to record. This information will appear on some of the reports.

- Move to the … button next to the *Date Resolved* field, and click on it to bring up the calendar.
- Now select the completion date from the calendar by clicking on it, then moves to and click on the *Select* command button.
- Next move to the *Completed* check box and place a check here by clicking on it with your left mouse button.

NOTE: Please note that an issue marked *Needs Attention* or *Urgent* will still be marked that way even if it has been closed. However the issue will not show up in any opened issues searches if the *Completed* check box has been checked.

Lookup View

The *Lookup View* tab is basically used as a lookup and sorting tool. Here you find all the issues in the current sort. You can select an issue for editing, deletion, and so on by clicking on the issue within this grid. Once selected you can click on the other tabs to view or edit the contents of that issue.



	Issue No	Date	Line	Machine	Reason	Reported By	Status
1	20	09/16/2008	Contract maintenanc	Area 7 east HVAC un	Burned out compress	Steve Herrick	Needs Attention
2	19	08/28/2008	Facilities	Various space heater	exhaust flue repair/re	Steve Herrick	Needs Attention
3	18	08/28/2008	Facilities	emergency lighting	does not exsist	Steve Herrick	Needs Attention
4	17	08/28/2008	Facilities	Fan, Exhuast old IEC	needs new motor	Steve Herrick	Needs Attention
5	16	08/28/2008	Facilities	Intervac Vacuum Pur	Needs new 15 hp mo	Steve Herrick	Needs Attention
6	15	08/28/2008	Facilities	HVAC A7.1-A split sy	repairs	Steve Herrick	Needs Attention
7	14	08/28/2008	Facilities	HVAC A9.4 RTU	Burned out compress	Steve Herrick	Needs Attention
8	13	08/28/2008	Facilities	HVAC A11.3 RTU	Needs conderser coil	Steve Herrick	Needs Attention
9	12	08/28/2008	Facilities	HVAC A11.2 RTU	Burned out a/c comp	Steve Herrick	Needs Attention
10	10	08/27/2008	Facilities	HVAC Area 2 RTU	needs new heat exch	Steve Herrick	Needs Attention
11	11	08/27/2008	Facilities	area 9.2 hvac	refrigeration leaks	Steve Herrick	Needs Attention
12	9	08/22/2008	Facilities	HVAC S6.5-R	draft inducer and wirir	Steve Herrick	Needs Attention
13	8	08/22/2008	Facilities	HVAC A9.5 RTU	needs new heat exch	Steve Herrick	Needs Attention
14	7	08/21/2008	Facilities	PA system	Voulme control of pag	Steve Herrick	Needs Attention
15	2	09/12/2007	Support Equipment	Forklift Truck	Dead Battery	Mike Sossa	Issue Resolved

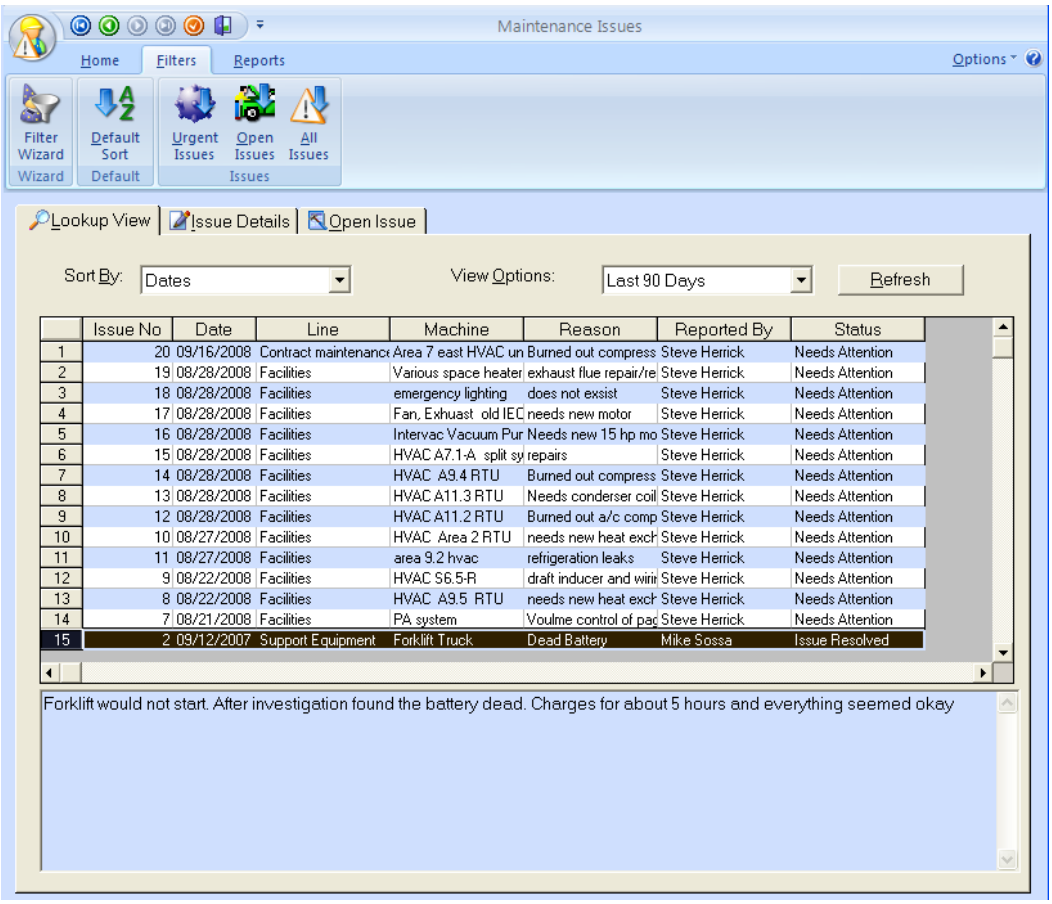
Resorting the Database

To resort the database:

- Click on the *Lookup View* tab to move to that screen.
- Move to the *Sort By* drop down list and select the option that best describes how you want the database sorted.
- Move to the *View Options* drop down and select the appropriate option here.
- Click on the *Refresh* button to have the database resorted by the options you have setup.

Reading Pane

On the *Lookup View* tab, you can turn on and off a reading pane that displays the issues main details. This feature can come in handy when trying to review or locate a particular issue or record.



	Issue No	Date	Line	Machine	Reason	Reported By	Status
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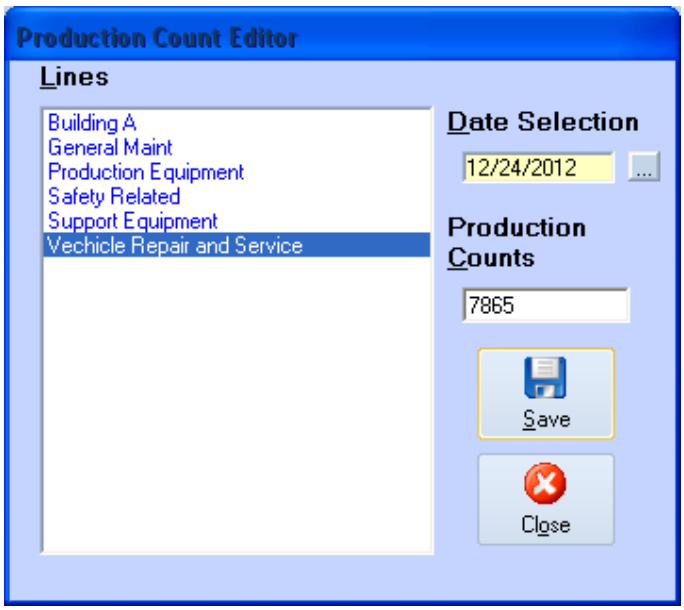
3	18	08/28/2008	Facilities	emergency lighting	does not exsist	Steve Herrick	Needs Attention
4	17	08/28/2008	Facilities	Fan, Exhuast old IEC	needs new motor	Steve Herrick	Needs Attention
5	16	08/28/2008	Facilities	Intervac Vacuum Pur	Needs new 15 hp mo	Steve Herrick	Needs Attention
6	15	08/28/2008	Facilities	HVAC A7.1-A split sy	repairs	Steve Herrick	Needs Attention
7	14	08/28/2008	Facilities	HVAC A9.4 RTU	Burned out compress	Steve Herrick	Needs Attention
8	13	08/28/2008	Facilities	HVAC A11.3 RTU	Needs conderser coil	Steve Herrick	Needs Attention
9	12	08/28/2008	Facilities	HVAC A11.2 RTU	Burned out a/c comp	Steve Herrick	Needs Attention
10	10	08/27/2008	Facilities	HVAC Area 2 RTU	needs new heat exch	Steve Herrick	Needs Attention
11	11	08/27/2008	Facilities	area 9.2 hvac	refrigeration leaks	Steve Herrick	Needs Attention
12	9	08/22/2008	Facilities	HVAC S6.5-R	draft inducer and wirir	Steve Herrick	Needs Attention
13	8	08/22/2008	Facilities	HVAC A9.5 RTU	needs new heat exch	Steve Herrick	Needs Attention
14	7	08/21/2008	Facilities	PA system	Voulme control of pag	Steve Herrick	Needs Attention
15	2	09/12/2007	Support Equipment	Forklift Truck	Dead Battery	Mike Sossa	Issue Resolved

To toggle the display of the *Reading Pane*:

- Click on the *module* button and select the *Show Reading Pane* option.

Production Numbers

Many of the reports used by this module are based on both issues and actual production counts. For this reason we have provided a way of entering production numbers from within this module.



To record production numbers into the database:

- Click on the *Module* button in the ribbon then select the *Enter Production Counts* option.
- After the *Production Count Editor* screen appears, move to the list of *Lines* and select the line you wish to assign numbers to by clicking on it. The line should now be highlighted showing it is indeed selected.
- Move to and click on the … button adjacent to the *Date Selection* field. This date should indicate the date these production numbers should apply to. When the *Calendar* screen appears, move to and select the appropriate production date and then click the *Select* button. This action will input the proper date into the *Date Selection* field.
- Move to the *Production Counts* field and enter the day's total production numbers. If a number was previously entered, it will be changed to this new number, not added to it.

- You must click the *Save* button. If you change the date or line before clicking the *Save* button, your entry will not be recorded. Note we have made the *Save* command a default button, so if you press the *ENTER* key right after entering a production number, that number will be saved.

Printing an Issue

To print an issue record:

- Select the issue you want to print from within the *Lookup View* grid. You make the selection by clicking on the issues with your left mouse button.
- Click on the *Print Record* icon in the ribbon or click on the *module* button and select the *Print -> Print Record* option.

Deleting an Issue

To delete a single issue from the database, please follow these steps:

- Select the issue you want to delete from within the *Lookup View* grid. You make the selection by clicking on the issues with your left mouse button.
- Click on the *Delete Record* option in the ribbon's *Home* tab.
- When the *Delete Record* screen appears click on the *Yes* button to continue the deletion process. If you have changed your mind, select the *No* or *Cancel* options.

Searching the Database

To find an Issue:

- Move to the *Home* tab of the ribbon.
- Click on the *Find First* option in the *Search* group.
- 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.

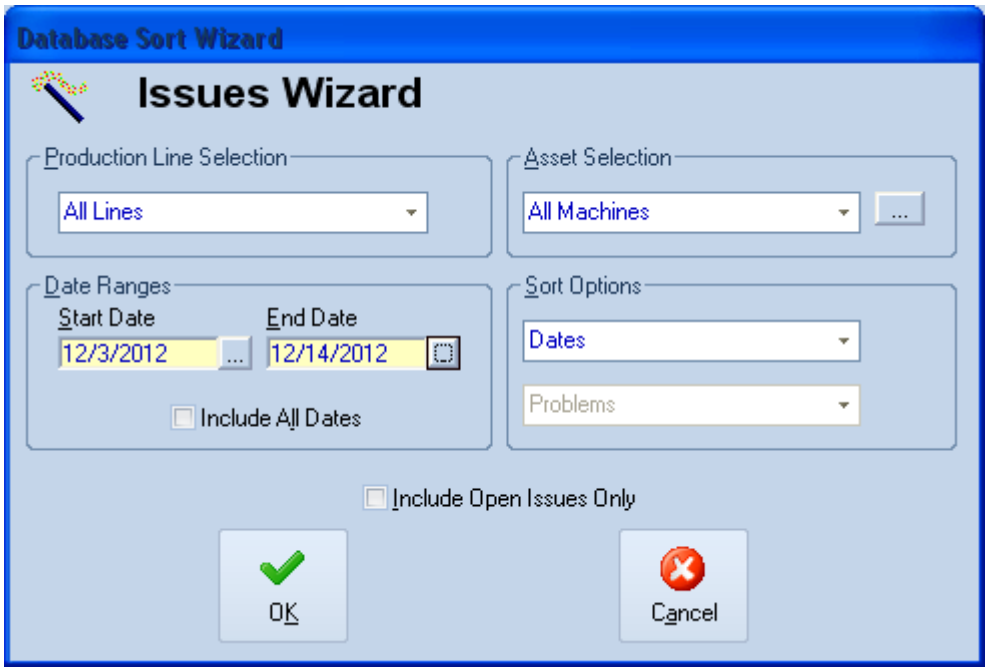
- If you only want to return exact matching records from your search, place a check in the *Exact Match Only* check box. If this box is left blank, the application will automatically insert wild card characters into the search.
- Click *Find First* button.

To find additional matches to your search:

- Click on the *Find Next* option in the ribbon or click F3.

Using the Issue Filtering Wizard

The *Filtering Wizard* is used for sorting and filtering records in the grid found on the *Issues Log* main screen, and is also used with reporting. We'll explain the use of this wizard only once. You will however see it being used multiple times.



Please follow these steps in setting up and using the *Issue Filtering Wizard.*

- First item to setup is the *Production Line Selection*. Use this option to filter out all records except those belonging to a single production line. If you wish to include all production lines then the *All Lines* option should be chosen. To select a specific line, click on the down arrow, and then select the production line of your choice by clicking on it.

- Next you need to move to the *Date Ranges* section, and setup the date range of the issues you wish to access.
- *Start Date* – This field should indicate the start date of the date range for your sort. Change this date by double clicking in this field, and selecting the new date from within the displayed calendar.
- *End Date* – This field should indicate the ending date of the date range of the sort. Change this date by double clicking in this field, and selecting the 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 all dates. Removing the check will allow the program to return only those issues that meet the date range criteria that you have setup in this section.
- Next move to the *Machine Selection* section. Use this option to filter out all records except those belonging to a single machine. If you wish to include all machines then the *All Machines* option should be chosen. To select a specific machine, click on the down arrow, and then select the machine of your choice by clicking on it.
- The last section of this wizard that needs your setup is the *Sort Options* section. Here you can specify two fields to sort the records by. The records will first be sorted by the up most option first and then further sorted by the lower option. To change these sort options click on the arrow and select your new sort field from those listed. Available fields are: Dates, Reasons, Machines, Lines and Reported By.
- If you would like only open issues to be viewed in the sort, place a check mark on the *Include Open Records Only* check box.
- Once all your sorting and filtering options have been setup to your liking move to and click on the OK command button.

Resorting the Database with the Issue Wizard

The *Issues Module* contains a few different options for sorting and viewing your records. The most powerful of these options is found in the use of the built in *Filtering Wizard.*

To use and access the *View Filtering Wizard*:

- Click on the *Filter* tab in the ribbon.
- Click on the *Filter Wizard* option.
- Next the *Issue Filtering Wizard* screen should appear. For more information on using this wizard please refer to the section titled: *Using the Issue Filtering Wizard.*

Save to History

To save a summary of a reported issue to the Equipment History log:

- Select the issue you want to save within the *Lookup View* grid. You make the selection by clicking on the issue with your left mouse button.
- Ensure there is an Equipment record assigned to this issue. This is done by using the *Equip* button adjacent to the *Machine* field on the *Details* tab.
- Click on the *Details* tab.
- Click on the *Save History* button in the lower right hand corner.

Create a New Archive Database

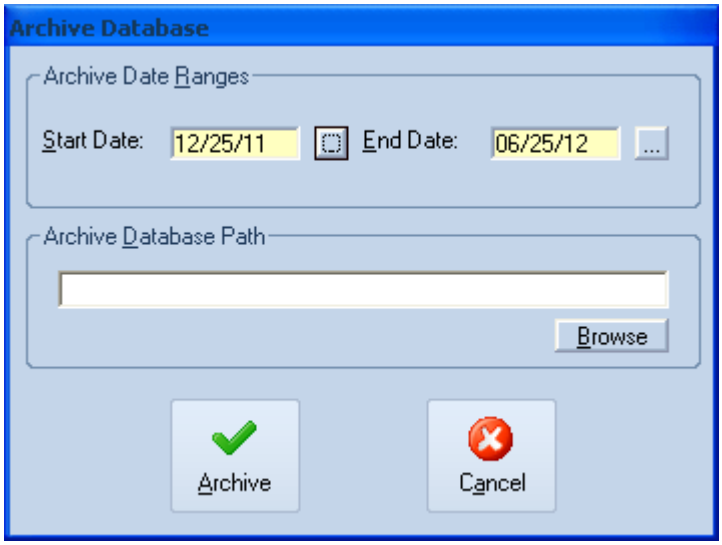
As you continue to use this application your database is sure to grow in size. As a database grows too large there can be performance issues such as speed, and problems with the data itself. For these reasons it is highly recommended that you remove data from the database in regular intervals. Either deleting older records or archiving them to an external database can also do this for you. In order to archive your records, you'll first need to create an archive database.

To create an archive database:

- Click on the *Module* button in the ribbon.
- Move to the *Databases* section and select the *Create Archive Database* option.
- Use this *Save As* type dialog as would any found in Windows, specifying the name and save path of this new database.
- Click the *Save* command button.

Archiving your Database

To archive your database:

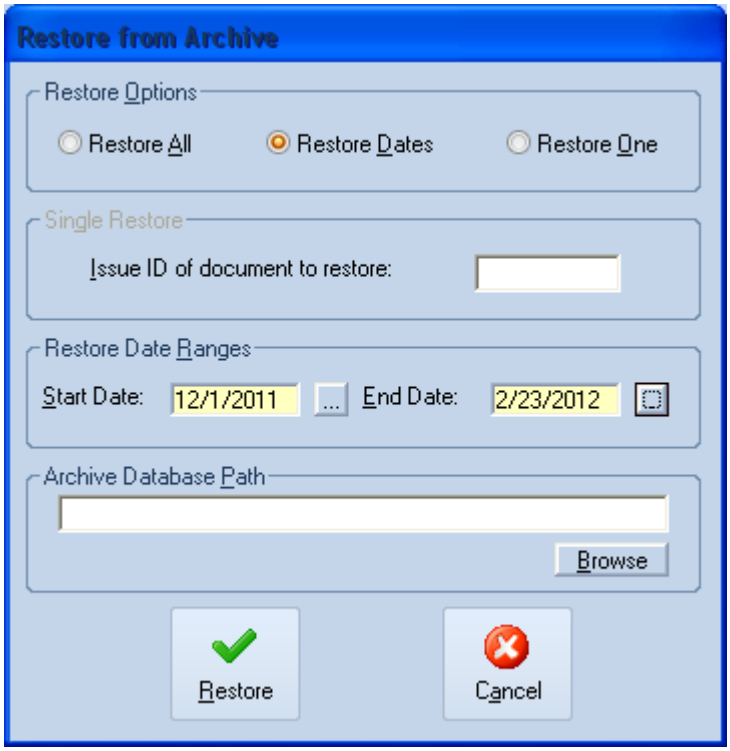


- Click on the *Module* button in the ribbon.
- Move to the *Databases* section and select the *Archive Database* option.
- Move to the *Date Range* section and click on the … command button adjacent to the *Start Date* field.
- Select the start date for your archive from within this calendar. Click on the *Select Date* button.
- Repeat the above step for the *End Date* field. All issues that fall between the two date ranges will be selected for archiving.
- Move to the *Archive Database path* section and click the *Browse* button.
- Locate and select your archive database using this file open type dialog. Click *Open.*
- Click the *Archive* button to remove the files from your main database and place them into the Archive database.

IMPORTANT NOTE: Archiving files frees up valuable database space, but this space will not be fully realized until you also perform a compact on the database. Performing a compact will free up this valuable database space. Please refer to the Database chapter for more details.

Restore Records from Archive

With the Database Restore feature you have three different restore options. You can restore every record found in the archive database, restore a date range of records, or restore a single record. These three options will be outlined next.



To restore all records from archive:

- Click on the *Module* button in the ribbon.
- Move to the *Databases* section and select the *Restore Database* option.
- Move to the *Restore Options* section and click on the *Restore All* radio button.
- Move to the *Archive Database path* section and click the *Browse* button.
- Locate and select your archive database using this file open type dialog. Click *Open.*
- Click *Restore*.

To restore a date range of records from archive:

- Click on the *Module* button in the ribbon.
- Move to the *Databases* section and select the *Restore Database* option.

- Move to the *Restore Options* section and click on the *Restore Dates* radio button.
- Move to the *Restore Date Ranges* section and click on the … command button adjacent to the *Start Date* field.
- Select the start date range for your restore from the calendar and click on the *Select Date* button.
- Repeat the above 2 steps for the *End Date* field to setup the ending date of the restore range.
- Move to the *Archive Database path* section and click the *Browse* button.
- Locate and select your archive database using the file open type dialog. Click *Open.*
- Click *Restore*.

To restore a single record from archive:

- Click on the *Module* button in the ribbon.
- Move to the *Databases* section and select the *Restore Database* option.
- Move to the *Restore Options* section and click on the *Restore One* radio button.
- Move to the *Issue ID or Work Order to Restore* field and type in the Issue ID number.
- Move to the *Archive Database path* section and click the *Browse* button.
- Locate and select your archive database using this file open type dialog. Click *Open.*
- Click *Restore*.

Deleting a Date Range of Issues

To permanently remove a date range of issues from the database:

- Click on the *Module* button in the ribbon.
- Move to the *Databases* section and select the *Delete Date Range* option.
- Select the ending date for this deletion from the calendar, and click the *Select Date* button. All issues that fall on or before this date will be permanently removed from the database.
- Next you'll be notified of how many records will be deleted, and given your last change to back out. To continue with the deletion, click the *Yes* button to the prompt. If you have changed your mind, click any of the other two buttons.

Reports Overview

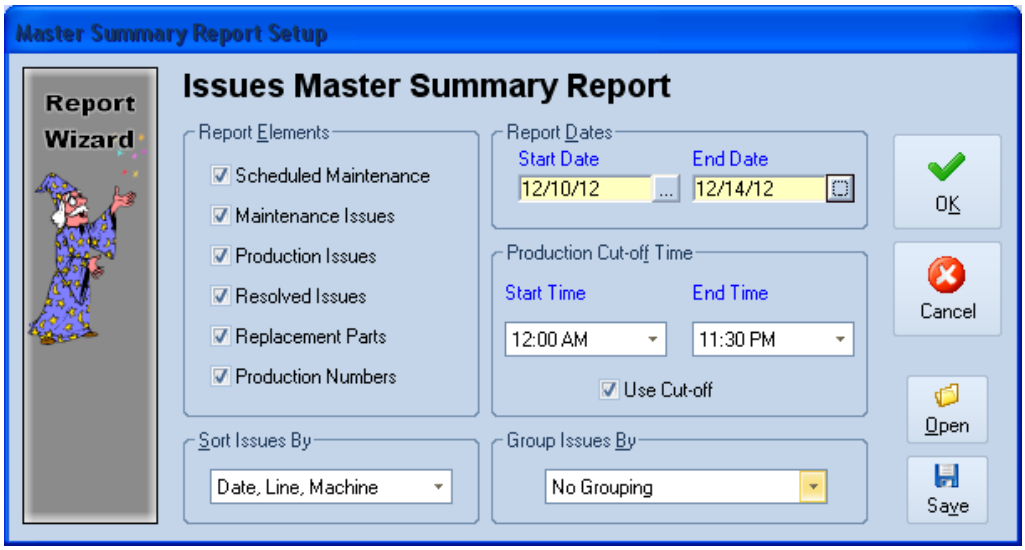
One of the main things that make the *Issues Log* so valuable is the reporting features. With the built in reports it should be an easy task for you to find problem areas and trends that can then be addressed.

One suggestion on the use of these reports is to generate them the day before a PM. What this will help you do is find areas that need attention while the line is down. The program is rich with reports that allow you to report on a single production line.

Another outstanding use of some of these reports is the sharing of information with others. Especially between your maintenance personnel, where one person can easily find out what the other persons done even if these two people never lay eyes on each other. The lack of communication between maintenance personnel can at times lead to a lot of unnecessary down time, where one mechanics duplicates or undoes the actions of another.

Master Summary Report Wizard

We expect that the Master Summary Report will be one of your most used reports and because of this reason we have attached it to the Tasks Panel on left side of your screen



To use the *Master Summary Report Wizard*:

- Click on the *Reports* tab in the ribbon, and then choose the *Summary Report* option in the *Master* group.
- After the report wizard loads, move to the *Report Elements* section of the screen and place a check mark by the elements you want included in the report. The following is a brief description of these elements.
    - *Scheduled Maintenance* - Placing a check mark here will show all the scheduled `Planned Maintenance' that is scheduled for the given date range.
    - *Maintenance Issues* – Placing a check mark here will include all the Maintenance Issues reported for the given date range.
    - *Production Issues* – Placing a check mark here will include all the Production Issues reported for the given date range.
    - *Resolved Issues* – Placing a check mark here will show all the open `maintenance' issues that have been resolved within the given date range.
    - *Replacement Parts* – Placing a check mark here will report on all the parts that were used by the maintenance people for the given date range.
    - *Production Numbers* – Placing a check mark here will report on any reported production for the given date range.
- Next move to the *Sort Issues by* list box and select the way you want the report sorted. Select an option by clicking on it from within the list.
- Next move to the *Report Dates* section and set up the Start and End Dates of the report. Change these dates by clicking on the … command buttons to the right of the date fields to bring up a calendar. Then click on the new date from within the calendar, and then clicking the SELECT command button to accept that date.
- Next move to the *Production Cut-Off Time* section and select the Start and End Time from the two drop down list boxes. These times will filter out all production issues reported that do not fall within the specified date and times. This feature is useful when you want to report for a single shift for example.
- If you would like to ignore the production cut off times, remove the check mark on the *Use Cut-off* check box by clicking on it.
- To group your reports, Lines, Manager or Machine, open the *Group Issues By* drop down and select one of the available options found there.
- Once everything has been setup to your liking, move to and click on the OK command button.

SAVING AND OPENING MASTER SUMMARY REPORT SETUPS

You may wish to save certain setups for later reuse. This could come in handy when you have different shift setups, and you don't want to reselect everything

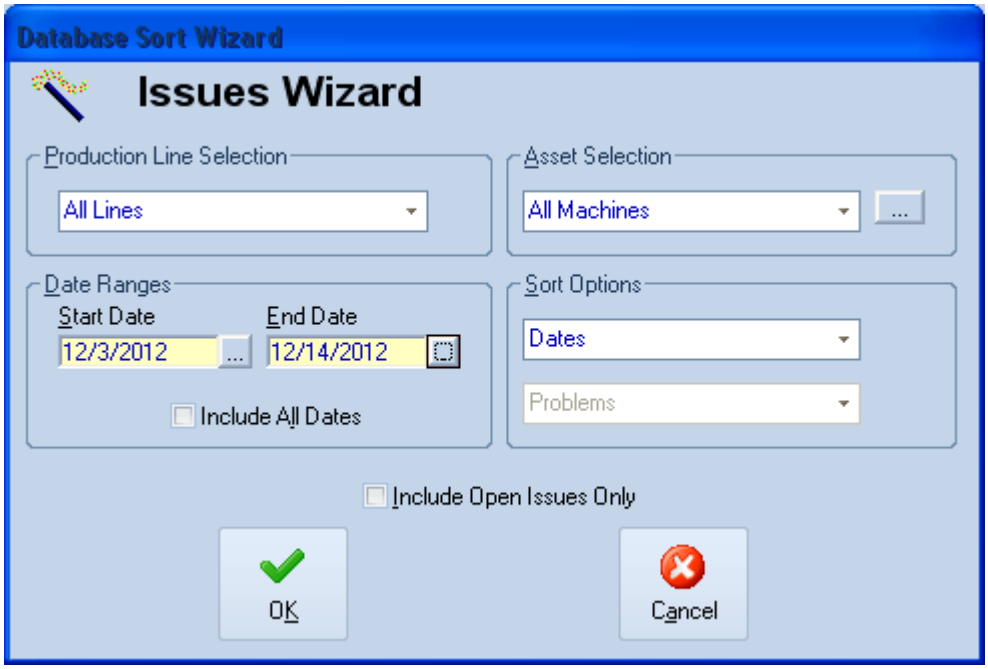
each time. By using the SAVE command you can save the current setup to file for later reuse. All Wizards setting will be saved except for the date ranges.

To save your setup just move to and click on the *Save* command button. Then use the displayed dialog screen as you would with any program running under Windows.

To open a saved setup file, just move to and click on the *Open* command button, and then use this dialog in the same fashion as you would use any Windows file open dialog.

Issues Report Wizard

This is a complete issues report, reporting on all issues within a given date range, and all the other criteria that you setup, such as production lines, machines, and sort options.



To create a report with the *Issues Report Wizard*:

- Click on the *Reports* tab in the ribbon, and then choose the *Issues Wizard* option in the *Issues Reports* group.
- Following the procedure as outlined in the following section: *Using the Issue Filtering Wizard.*

Production Counts and Issues Reports

There are 3 different Production counts and Issues Reports available. All three of these deal with the same basic information, the production counts for a given date period, a specific production line, and all the issues report for the date range and line.

These reports are ideal at pin pointing exactly how a production is performing along with any reported issues. We highly recommend using one of these reports prior to any maintenance days. This way you can see where to assign your resources to get the best results.

To use one of the *Production and Issues Report*:

- Click on the *Reports* tab in the ribbon, and then choose the *Counts and Issues* option in the *Production* group.
- Next click on the report option of your choice.
- Move to the *Date* field and click on the … button adjacent to this field. For the 7 days and 14 days summary reports, select the ending date for your report. For the *Month Summary Report* select and date within the month you want to report on.
- Click the *Select Date* button.
- Next the *Format Report Chart* screen will appear with production count information for the given date range. For information on how to format this chart see the charter titled *Chart Designer.*
- Once done with formatting your chart, click on the *Close* button.

Top 10 Issues Report

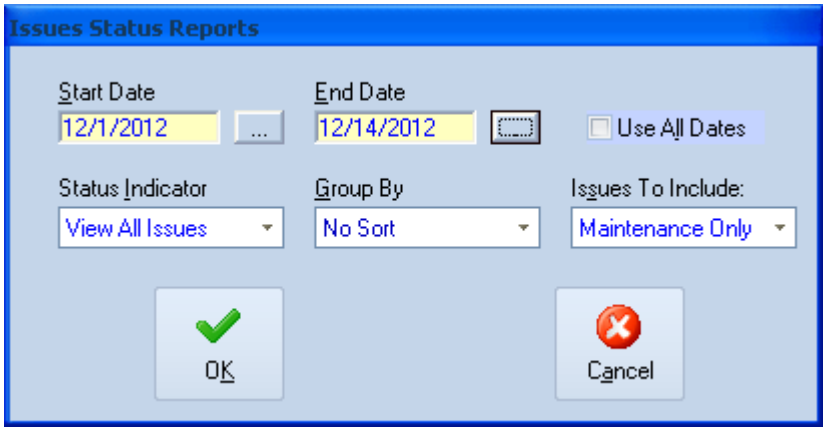
This report returns the frequency of recurring issues for the entire plant, line or machine, and date range you select. This report is ideal for pin pointing the number one problem area, and then breaking down that issue even further. In summary, this report returns the top 10 recurring issues with actual counts, for the criteria that you setup.

To create *Top Ten Issues Report:*

- Click on the *Reports* tab in the ribbon, and then choose the *Top Ten Issues* option in the *Issues Report* group.
- Following the procedure as outlined in the following section: *Using the Issue Filtering Wizard.*

Issues Status Report

The *Issues Status Report* uses a wizard to assist you in creating reports on issues status, and issues that fall within a specified date range. This report will help you stay on top of your open issues.



To create an *Issues Status Report*:

- Click on the *Reports* tab in the ribbon, and then choose the *Status Report* option in the *Issues Report* group.
- Move to and click on the … button adjacent to the *Start Date* field, and select a starting date for the issues you want to report on from the popup calendar.
- Repeat the above step for the *Ending Date* field.
- To report on all issues, regardless of their dates, place a checkmark in the *Use All Dates* checkbox.
- Move to the *Status Indicator* drop down list and select the appropriate option.
- Repeat the above step for the *Group By* and *Issues To Include* drop down list.
- Click on the *Ok* button.

Parts Usage Report

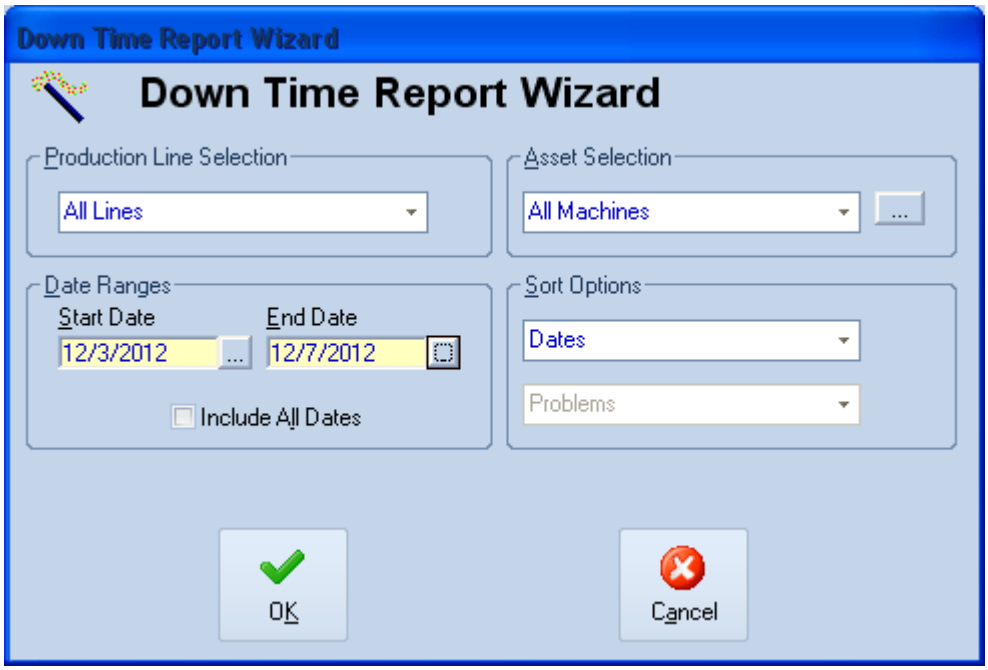
This report will return a list of all parts that were used in the completion of issues, and that fall within a given date range.

To create a *Part Usage Report*:

- Click on the *Reports* tab in the ribbon, and then choose the *Parts Usage* option in the *Issues Report* group.
- Move to and click on the … button adjacent to the *Start Date* field, and select a starting date for the issues you want to report on from the popup calendar.
- Repeat the above step for the *Ending Date* field.
- To report on all issues regardless of dates, place a checkmark in the *Use All Dates* checkbox.
- Click *Ok.*

Downtime Report

The Downtime reports will report on total downtime for criteria that you setup. This information is taken directly from reported issues.



To create a report with the *Issues Report Wizard*:

- Click on the *Reports* tab in the ribbon, and then choose the *Downtime Report* option in the *Issues Reports* group.
- Following the procedure as outlined in the following section: *Using the Issue Filtering Wizard.*

Predictive Maintenance Report

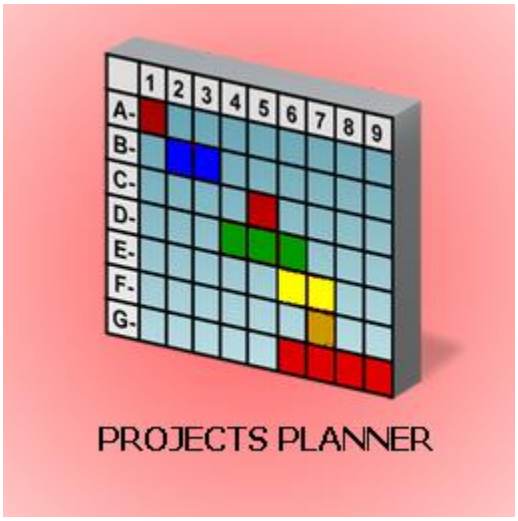
This report provides a worksheet based on part replacement as it applies to Issues Part Usage. The report gives information about the replacement intervals of parts that have been replaced more than once. With this information the user should be able to predictive the failure rate of the reported parts, and schedule maintenance accordingly.

To Predictive Maintenance Report:

- Click on the *Reports* tab in the ribbon, and then choose the *Predictive Maintenance* option in the *Predictive* group.

MAINTENANCE COORDINATOR SYSTEM

Project Planner



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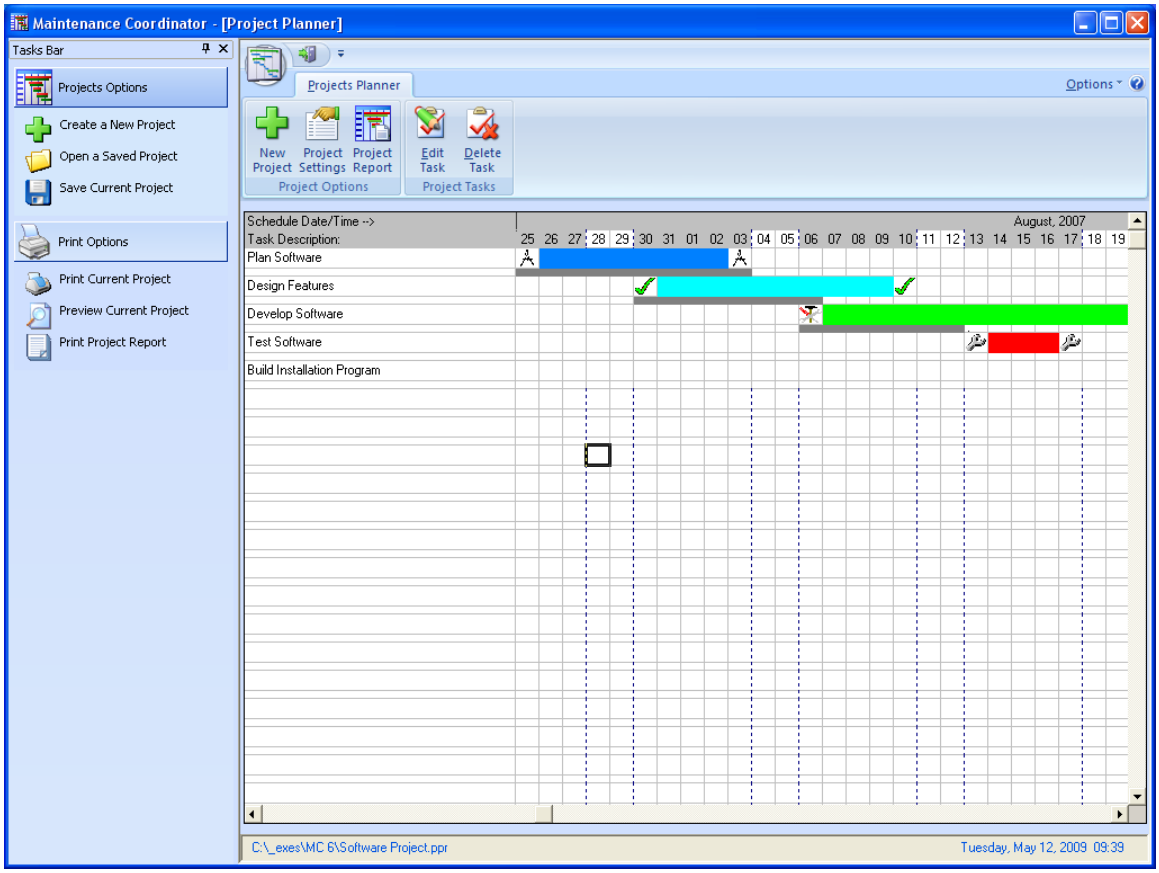
Project Planer Overview

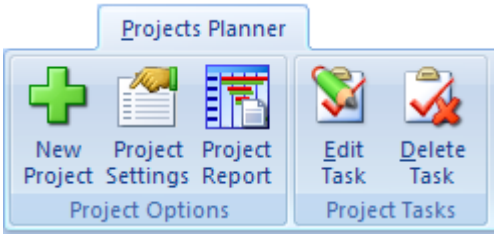
The *Project Planner* module was included with the *Maintenance Coordinator* program to provide you manager types out there with a means of managing your occasional projects. If your normal duties require a great deal of project administration this module will more than likely be too limited for your use. But if you only have occasional projects to manage, such as those a maintenance supervisor might encounter, you may find this module of value, and save you from having to purchase a more costly one.



With this module you can create a single day, divided by half-hour projects, or ones lasting months. An example of a single day project could be maybe laying out duties for a single day plant shutdown. Allowing you to assign tasks to different individuals and making start and end time assignments. Where the other maybe to plan a new production line where you would plan when each phase would commence and end.

Project Planner Ribbon

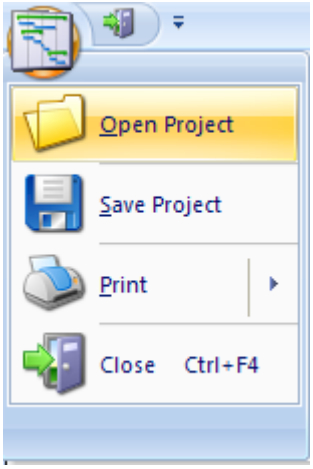
To help ease in the creation and administration of your project and its tasks, we have included a ribbon. The elements of this ribbon are outlined next:



- *New Project* – Creates a new project, replacing the current project.
- *Project Settings* – Opens the project properties dialog.
- *Project Report* – Print preview of the project's report.
- *Edit Task* – Opens the task setup dialog.
- *Delete Task* – Erases the selected task from the project.

Project Planner Module Button

The following is an outline of the elements of the Project Planner's Module button or menu:

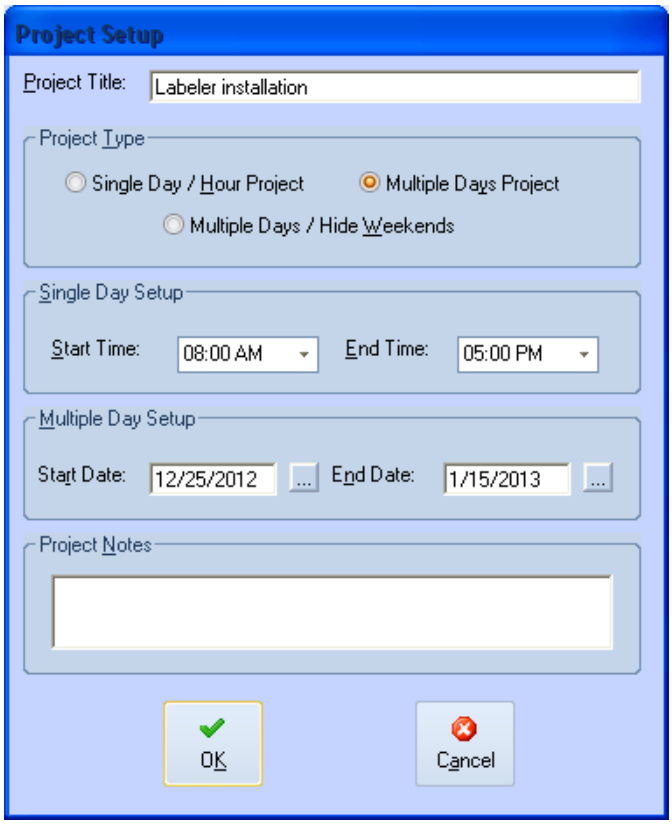


- *Open Project* – Opens a project file saved to disk.
- *Save Project* – Save the current project to file.
- *Print* – Provide printing options
    - *Print Report* – Prints the current project.
    - *Preview Report* – Opens the print preview screen.
- *Close* – Exits this module.

Creating a New Project

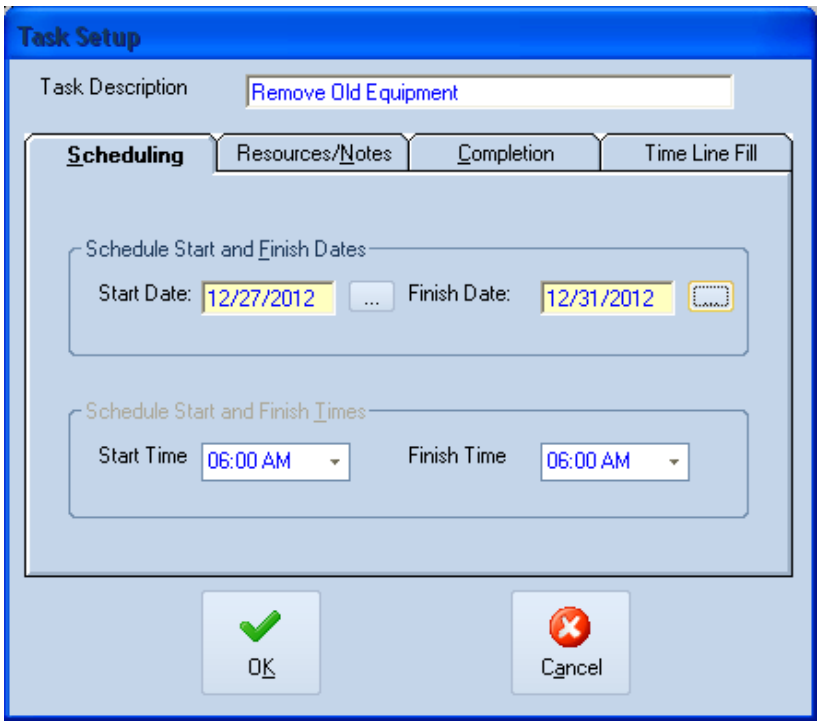
The first task you'll be required to perform in the use of this module will be in the creation of a new project. The steps to perform this task will be outlined next.

- Click on the *New Project* option in the ribbon.
- Move to the *Project Title* text box and type a brief description of the project you are planning.
- Move to the *Project Type* area and select the project type option button that best fits the project you are creating. The following options are available:
    - *Single Day / Hourly Project* – This option allows for a project that will be completed in a single day, and broken into half-hour intervals.
    - *Multiple Days Project* – This option allows for the creation of a multiple days or even months project. The project intervals are broken into days.
    - *Multiple Days / Hide Weekends* – This option is the same as the above option, except weekends are hidden.



- If you choose a *Single Day* type project next move to the *Single Day Setup* area and setup the *Start Time* and *End Time* of the project. Setup these times by clicking on them from within the drop down list boxes.
- If you choose one of the *Multiple Days* project you need to move to the *Multiple Days Setup* area and setup the *Start Date* and *End Date* of your project. Select these dates by clicking on the … command buttons and then selecting the dates from the popup calendar.
- Move to the *Planner Notes* section and record any notes you wish to record about the current project.
- Once everything is setup on this screen to your liking, click on the *OK* command button to create your new blank project.

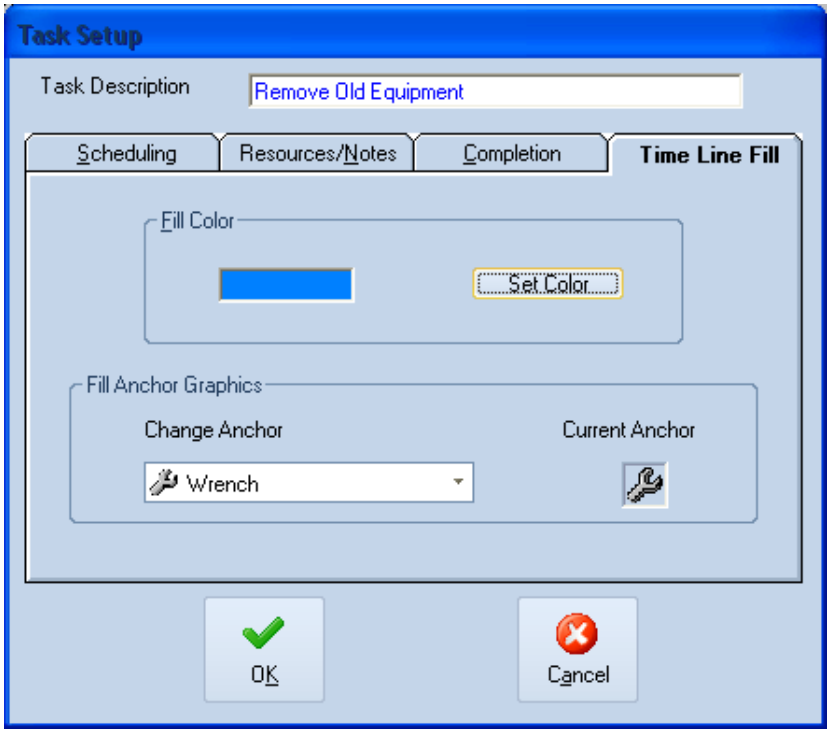
Entering and Editing Tasks



Once a blank project has been setup, its time to add or edit the tasks for that project. To edit tasks please follow these steps:

- Move to the row in the grid that you want to add or edit a task, and double mouse click in the left most column of that row. You can also choose the *Edit* Task option in the ribbon. This action will bring up the *Task Setup* screen.

- Move to the *Task Description* field and type in a brief description of the task to be created. You can enter a somewhat more descriptive description in the *Notes* section on the *Resources / Notes* tab.
- Move to the *Schedule Start and Finish Dates* or *Schedule Start and Finish Times* sections, depending on your project type, and setup the criteria for the current task.
- Move to and click on the *Resources/Notes* tab.
- Move to the *Resource Assignments* section and type in the names that are assigned to the task you are creating.
- Move to the *Task Notes* section and type whatever information here you wish to record about the current task.
- Click on the *Time Line Fill* tab to move to that section.
- Move to the *Fill Color* section and click on the *Set Color* button.
- Select the color you want to use for your time fill and then click *OK*.
- Move to the *Fill Anchor Graphics* section and select the graphic you want to use to anchor the time fill from those listed in the *Change Anchor* dialog box.



- Once everything is setup for the current task to your liking, move to and click on the *OK* button.
- The task should now show up on the main screen filling the time slot range that you have just setup.

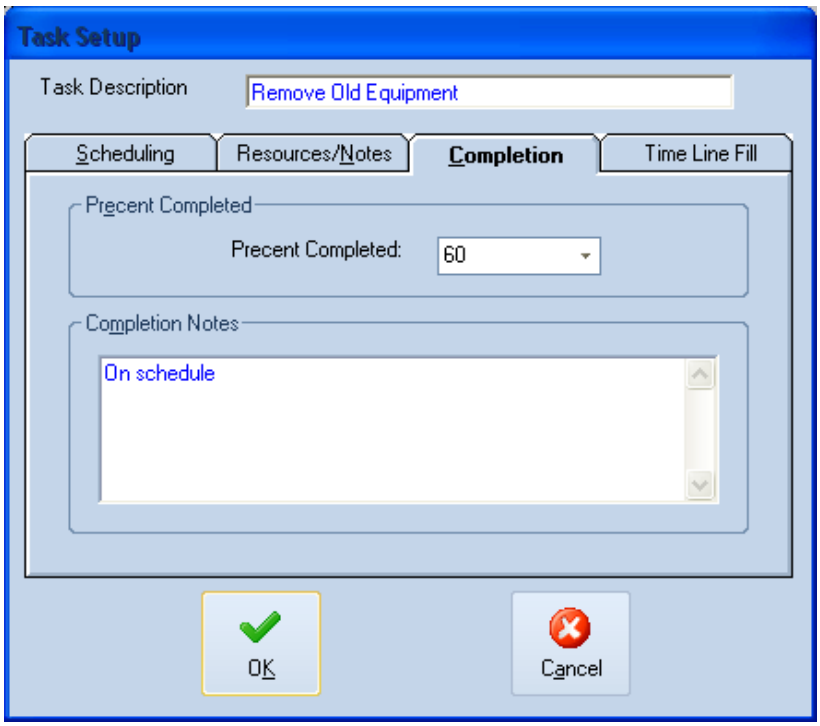
Deleting a Task

To delete a task:

- Click in the row that contains the task you want to delete.
- Click on the *Delete Task* option in the ribbon.
- When prompted about the deletion, click the *Yes* button.

Tracking a Task Completion

To track the completion of a given task:

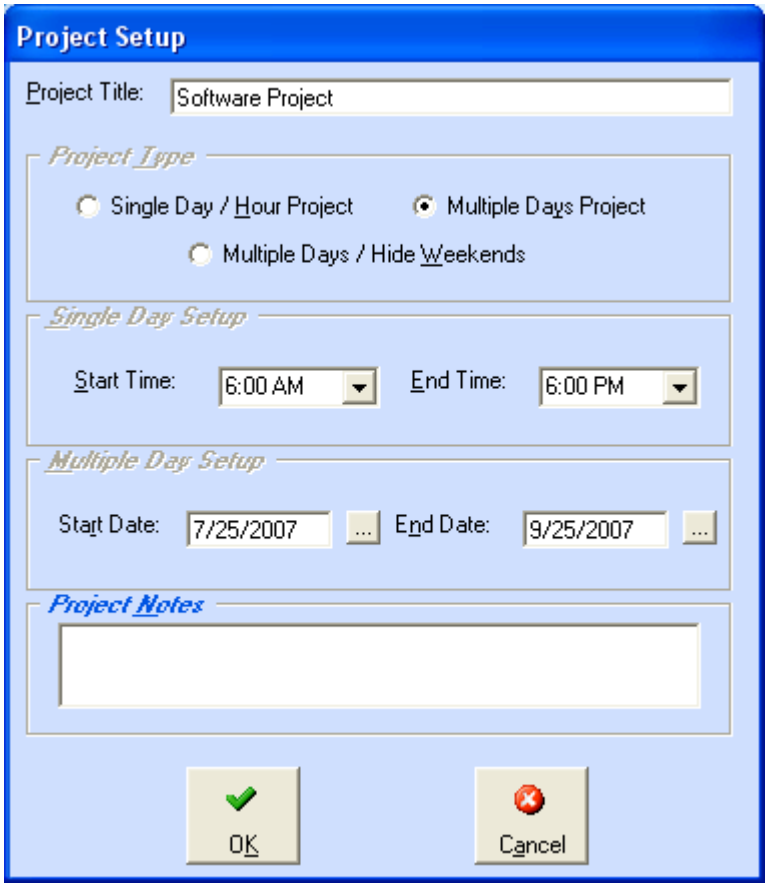


- Move to the row in the grid that contains the task you want to work with and double mouse click in the left most column of that row. This action will bring up the *Task Setup* screen.
- Move to and click on the *Completion* tab.
- Move to the *Percent Completed* section and select at what percent the task has been completed.
- Move to the *Completion Notes* section and record any information here that you feel applies.

- Click on the *OK* button to save your changes.

Edit a Project Setup

Once a project has been setup you are limited as to how much of this setup you can change. Basically, all you're allowed to change is the *Project Title* and the *Planner Notes.* To change these two items please follow these steps.



- Click on the *Project Settings* option in the ribbon.
- Move to the *Project Title* and *Planner Notes* sections and edit these fields to your liking.
- Click on the *OK* button to save your changes.

Sorry, but once created the date range or project type settings cannot be changed.

Print Preview

To receive a print preview of your project:

- Click on the *Module* button.
- Move over the *Print* option and then click on *Print Preview*.

Printing Your Project

To sent a copy of your project to your printer:

- Click on the *Module* button.
- Move over the *Print* option and then click on *Print Project*.
- When the *Print* dialog appears move to and setup the various options on this window, and then click on the *OK* button.

Opening a Saved Project

To open or reload a saved project, you must:

- Click on the *Module* button.
- Click on the *Open Project* option.
- Use this *File Open* dialog screen as you would use any *File Open* dialog found in Windows.

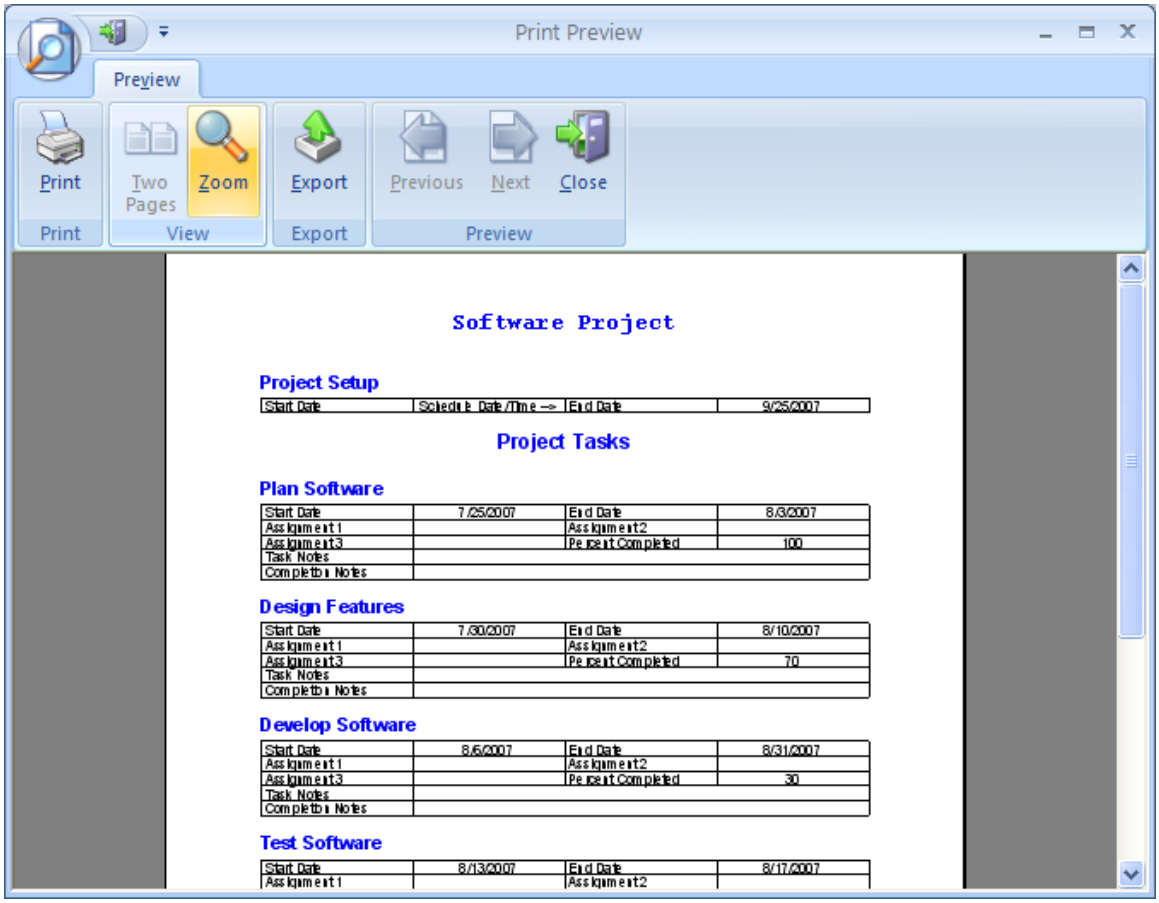
Saving a Project File

To save a project to disk, please follow these steps:

- Click on the *Module* button.
- Click on the *Save Project* option.
- Use this *File Save* dialog screen as you would use any *File Save* dialog found in Windows.

Project Report

The Project Report will supply you with a summary of the project's setup, along with a summary of each of its tasks.



To generate a Project Report:

- Click on the *Project Report* option in the ribbon.

MAINTENANCE COORDINATOR SYSTEM

Mechanics and Employees

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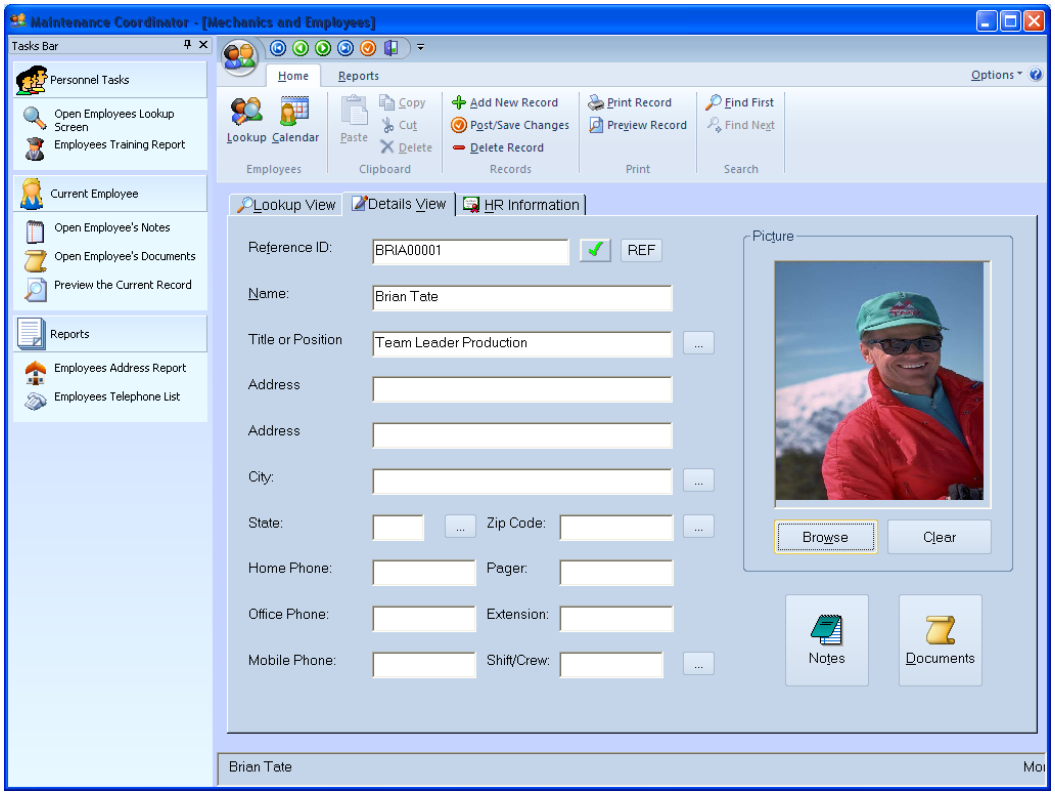
Mechanics Overview

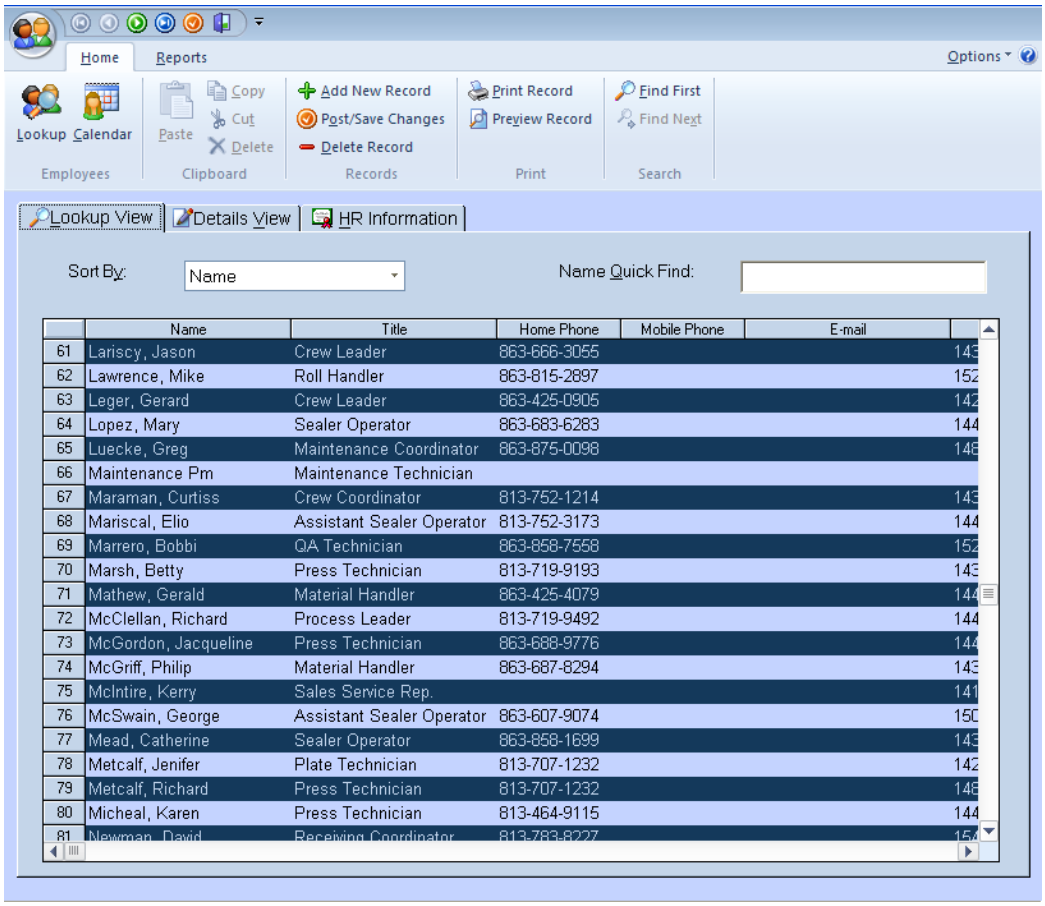
The Mechanics module is used to store important information about your work force. Information found here includes their position, address, telephone numbers, emergency contacts and more.

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



Lookup View

The *Lookup View* shows you the current database and its current sort in table form. This table format helps facilitate 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. Once 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.

Mechanic's Reference Field

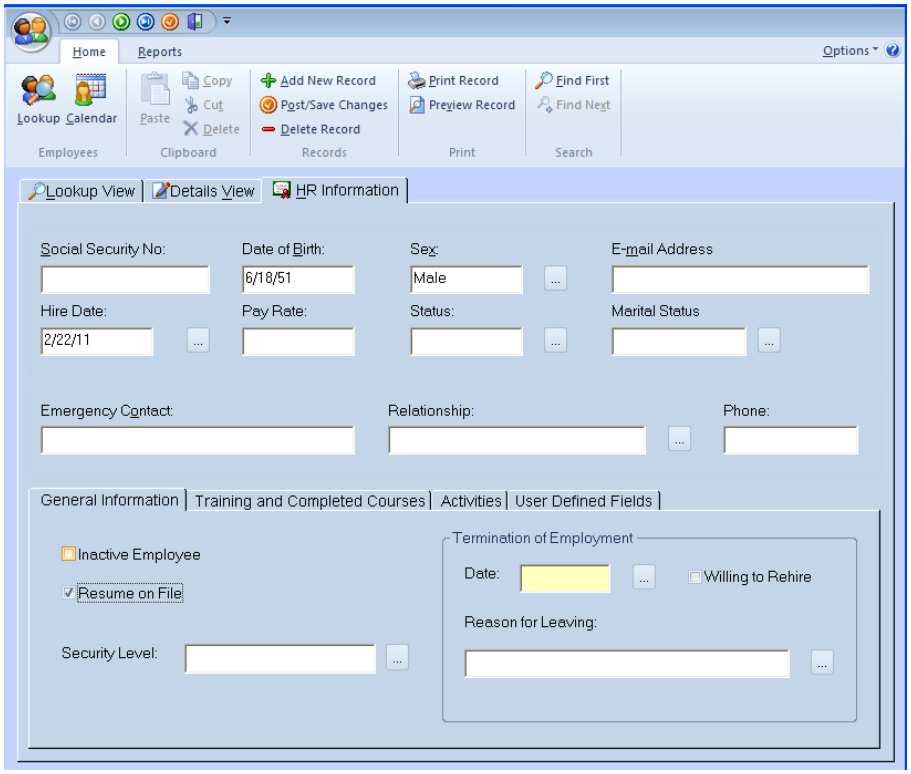
This field, found on the *Details View* tab should contain a unique identifier for each different employee in the database. We did not however make this a mandatory rule as everyone has their own way of doing things. You can however verify if the identifier you've entered is unique to the database.

To test to see if your identifier is unique:

- Enter your *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.
- If you click on the *REF* button also adjacent to the *Reference ID* field, the program will automatically assign a unique ID.

Entering HR Information

Once an employee's record has been created, more detailed information can be recorded for that individual by entering HR type information.



To add HR information to a mechanic's record:

- Locate the mechanic of your choice through one of the lookup routines.
- Click on the *HR Information* tab.
- Move to the various fields found on this tab and record the appropriate information for that field.

Recording Completed Training

You can record and keep track of training that your employees have completed. This information can be useful at promotion time for example, when you want to see just how qualified an employee is for an open position. This is just one example, I'm sure you can think of others.

To record completed training:

- Locate the mechanic of your choice through one of the lookup routines.
- Click on the *HR Information* tab.
- Click on the *Training and Completed Courses* tab near the bottom of the screen
- Click the *New* button.
- When the *Training* screen appears, move to the various fields and record the appropriate information for that field.
- Click the *Ok* button.

Editing Training Information

To edit an employee's training records:

- Locate the mechanic of your choice through one of the lookup routines.
- Click on the *HR Information* tab.
- Move to the *Training and Completed Courses* tab and click on the record you want to edit from within the grid.
- Click the *Edit* button.
- When the *Training* screen appears, move to the various fields and record or edit the information found in that field.
- Click the *Ok* button.

Deleting Training Information

To edit an employee's training record:

- Locate the mechanic of your choice through one of the lookup routines.
- Click on the *HR Information* tab.
- Move to the *Training and Completed Courses* tab and click on the record you want to delete from within the grid.
- Click the *Delete* button.
- Click *Yes* when prompted about the deletion.

Recording Activities

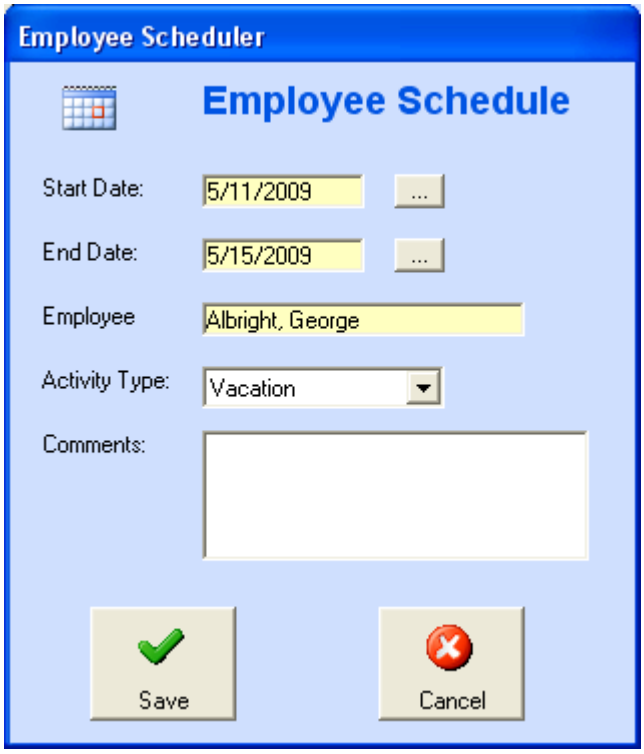
You can record and keep track of activities related to each employee such as leaves, renewals, vacations and other general time related schedules. This information can be valuable to your organization, and you can both run reports on this information along with print calendars of activities.

To create a new activity:

- Locate the mechanic of your choice through one of the lookup routines.
- Click on the *HR Information* tab.
- Click on the *Activities* tab near the bottom of the screen
- Click the *Add Schedule* button.
- When the *Employee Scheduler* screen appears, move to the various fields and record the appropriate information for that field.
- Select the appropriate activity type by clicking on the choices available in the *Activity Type* drop down box.
- Click the *Save* button.

Editing Activity Information

To edit an employee's training records:



- Locate the mechanic of your choice through one of the lookup routines.
- Click on the *HR Information* tab.
- Move to the *Activities* tab and click on the record you want to edit from within the grid.
- Click the *Edit Schedule* button.
- Move to the various fields and record or edit the information related to that field.
- Click the *Save* button.

Deleting Activity Information

To edit an employee's activity schedule:

- Locate the mechanic of your choice through one of the lookup routines.
- Click on the *HR Information* tab.
- Move to the *Activities* tab and click on the record you want to delete from within the grid.
- Click the *Delete Schedule* button.
- Click *Yes* when prompted about the deletion.

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.

Employee's Notes

You can include a complex set of notes to be attached to each one of your employee files. The size of the note files are limited by available disk space, and are saved within the main database. The editor used for the notes section is actually a small word processor, and contains many of the features of commercial word processing programs. To find how to use the features of this word processor please refer to the *Word Processor* chapter.

To access the mechanic's notes:

- Locate and select the mechanic you want to work with.
- Move to the *Details View* tab by clicking on it.
- Click on the *Notes* button.

Documents

You can maintain many other documents and pictures dealing with your mechanics by accessing the *Documents* feature. To learn how to work with this documents feature, please refer to the *Common Features* chapter.

IMPORTANT NOTE: The *Documents Feature* in this module differs from the other modules as these documents are attached to each employee's file or record, whereas with most of the other modules the documents are not attached to any specific record.

To access an employee's documents:

- Locate and select the mechanic you want to work with.
- Move to the *Details View* tab by clicking on it.
- Click on the *Documents* 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.

Searching the Database

To find a mechanic:

- Click on the *Find First* option in *Home* tab's Search group, or click Ctrl - F.
- Move to the *Search Text* field and enter your search criteria.
- Move to the *Search Type* drop down list and select 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 the *Find First* button.

To find additional matches to your search:

- Click on the *Find Next* option in the ribbon or click F3.

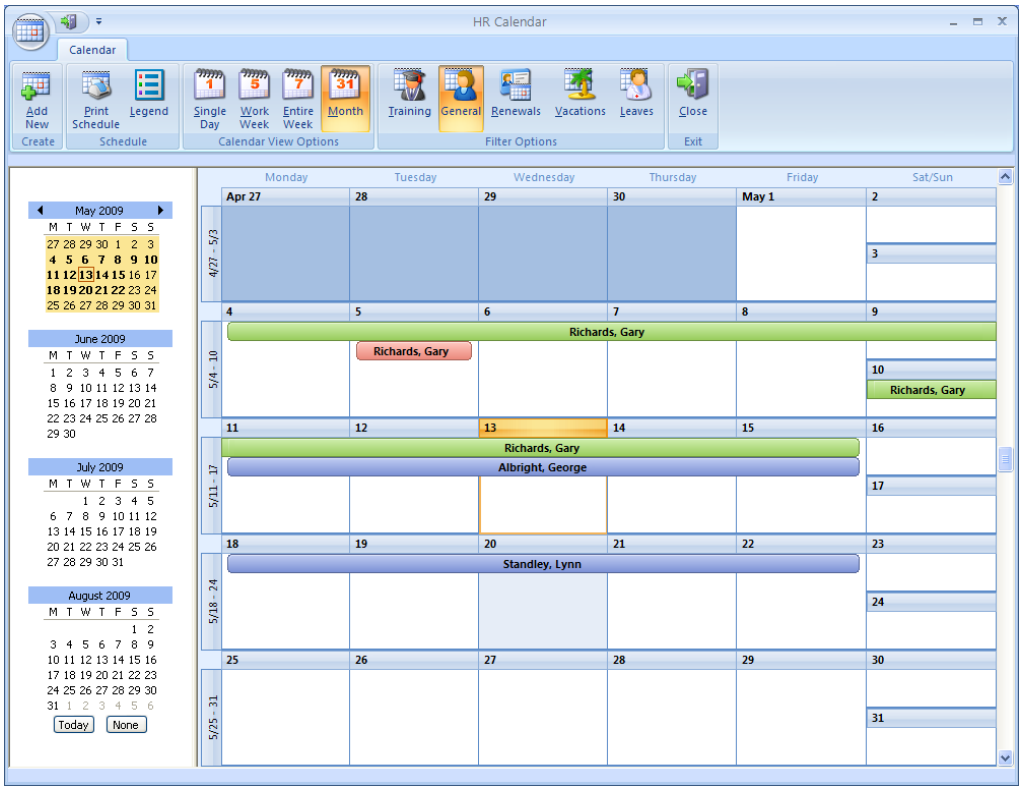
Printing a Mechanic's File

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.

Accessing the HR Calendar

The HR Calendar is used to show scheduled activities as it relates to your employees in calendar form. You can display, print and create new activities in single day, week, work week, and month views. It supports schedules for training, renewals, vacations, leaves and other general types.

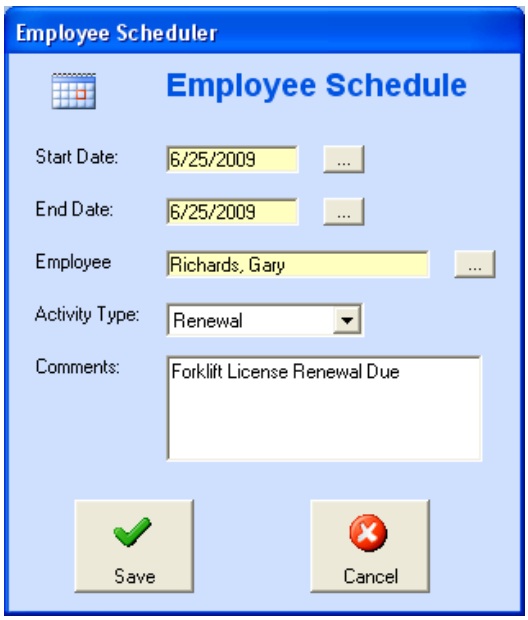


To access the HR Calendar:

- Move to the *Home* tab in the ribbon.
- Move to the *Employees* group and select the *Calendar* option.

Adding a New Schedule

To add a new scheduled activity to the HR Calendar:



- Open the HR Calendar
- Move to the *Create* group in the ribbon and select *Add New*.
- Move to the *Start* and *End Date* fields and click on the … buttons adjacent to these fields to set these dates.
- Click on the … button adjacent to the *Employee* field and select an employee from the lookup, and assign them to this schedule.
- Move to the *Activity Type* drop down and select an activity type that best matches the one you're creating.
- Move to the *Comments* field and add any comments.
- Click in the *Save* button.

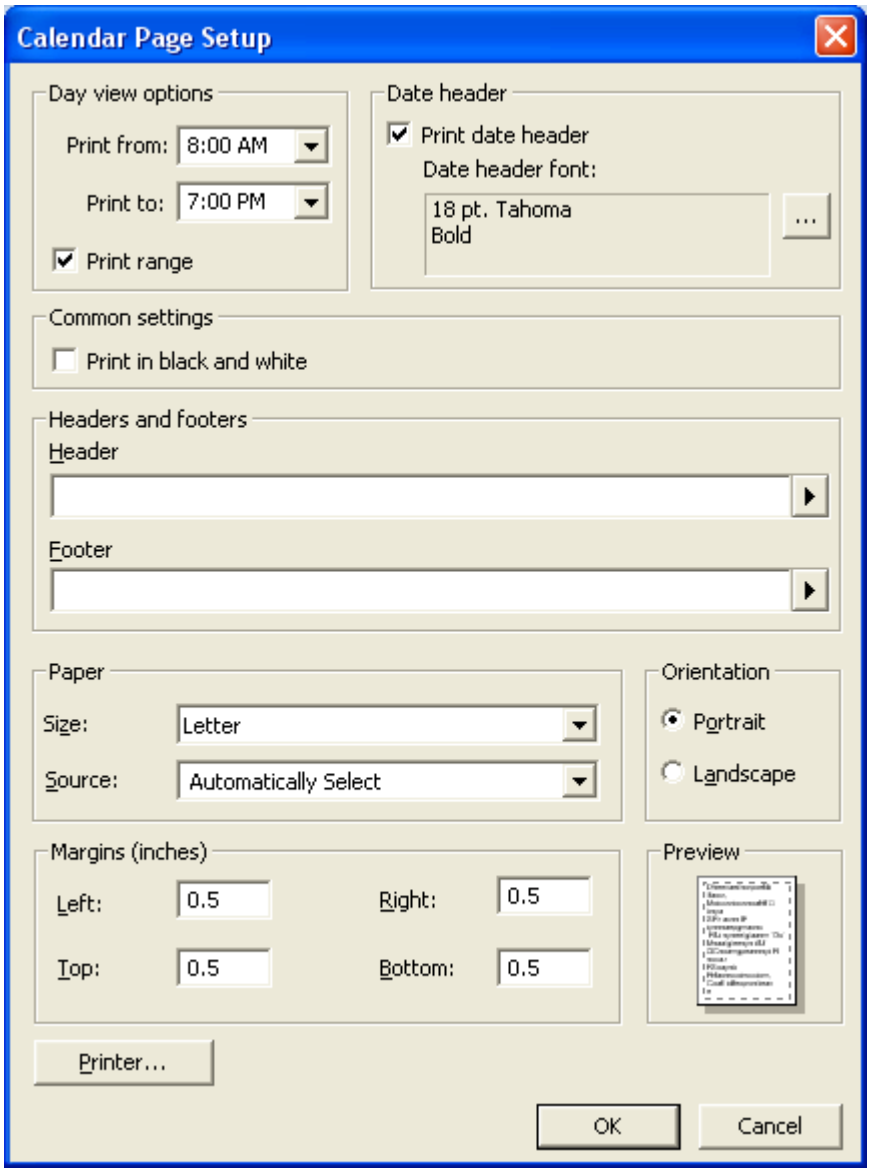
HR Calendar Legend

Each task type in the calendar has a color assigned to it. To view the legend:

- Open the HR Calendar.
- Click on the *Legend* option in the ribbon.

Print the HR Calendar Schedule

To receive a print out of the current HR Calendar view:



- Open the HR Calendar.
- Select the view option of your choice.
- Click on the *Print Schedule* option in the ribbon
- Setup the elements of the *Page Setup* screen to your liking.
- Click on the *OK* button.

- When the *Preview* screen loads, move to and click on the *Print* button to print the calendar.

HR Calendar Views

There are different views available to the HR Calendar, to change these views:

- Open the HR Calendar.
- In the ribbon, move to the *Calendar View Options* group and select click on the view option of your choice.

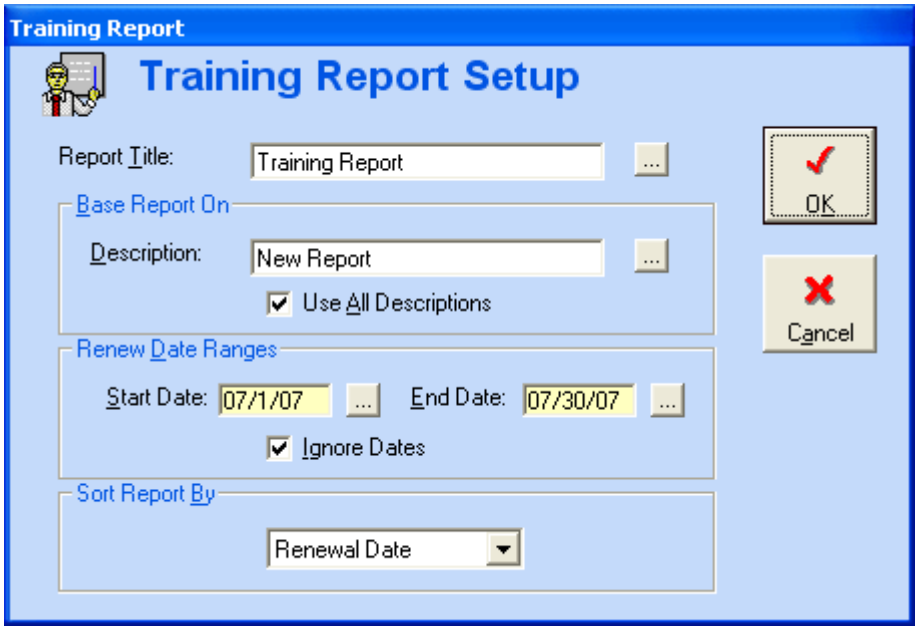
HR Calendar Filter Options

There are a few options as to what information to display on HR Calendar. To change or set the filter options:

- Open the HR Calendar.
- In the ribbon, move to the *Filter Options* group and click on the filter option of your choice.
    - *Training* – This option shows only scheduled training.
    - *General* – This option show schedules in the General types, along with renewals, vacations and leaves.
    - *Renewals* – This option shows all scheduled renewals only.
    - *Vacations* – This option shows all scheduled vacations only.
    - *Leaves* – This option shows all scheduled leaves only.

Training Report

With this report you can see what certifications are coming up for renewal, and also report on a single course description, and find who has completed it.



To create a training report:

- Click on the *Reports* tab in the ribbon and then select the *Training Report* option.
- Move to the *Report Title* field and enter a title for your report.
- Move to the *Base Report On* section and enter the appropriate information in the *Description* field. This field points to the course description fields, such as Forklift Certification, Annual OSHA training, and other related information.
- To ignore a specific course description, and base your report on all courses, place a check in the *Use All Descriptions* checkbox.
- Move to the *Renewal Date Ranges* section and click on the … button adjacent to the *Start Date* field.
- Select a date from the popup calendar and click the *Select Date* button. The dates for this section are renewal, or re-certification dates.
- Repeat the above step for the *End Date* field.
- To use all dates, regardless of any renewal date setups, move to and place a check in the *Ignore Date* checkbox.

- Move to the *Sort Report By* drop down list and select how you want your report sorted.
- Click the *Ok* button.
- 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.

Telephone List Report

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.

Address List Report

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.

Calendar Reports

There are a few reports available as they related to scheduled activities and the built-in HR Calendar. To access these reports:

- Click on the *Reports* tab in the ribbon.
- Move to the *Calendar Reports* group and select the report of your choice.

  - *General Report* – This option show schedules in the General types, along with renewals, vacations and leaves.
  - *Renewal Report* – This option shows all scheduled renewals only.
  - *Vacation Report* – This option shows all scheduled vacations only.
  - *Leaves Report* – This option shows all scheduled leaves only.
- When the *Select Date Range* dialog pops up, move the … button adjacent to the *Start Date* field and setup the starting date of your report range.
- Click the … button adjacent to the *End Date* field and setup the ending date of your report range.
- Click on the *Accept* button to create the report.

MAINTENANCE COORDINATOR SYSTEM

Tools Database

SIMPLICITY
Software Technologies Inc.

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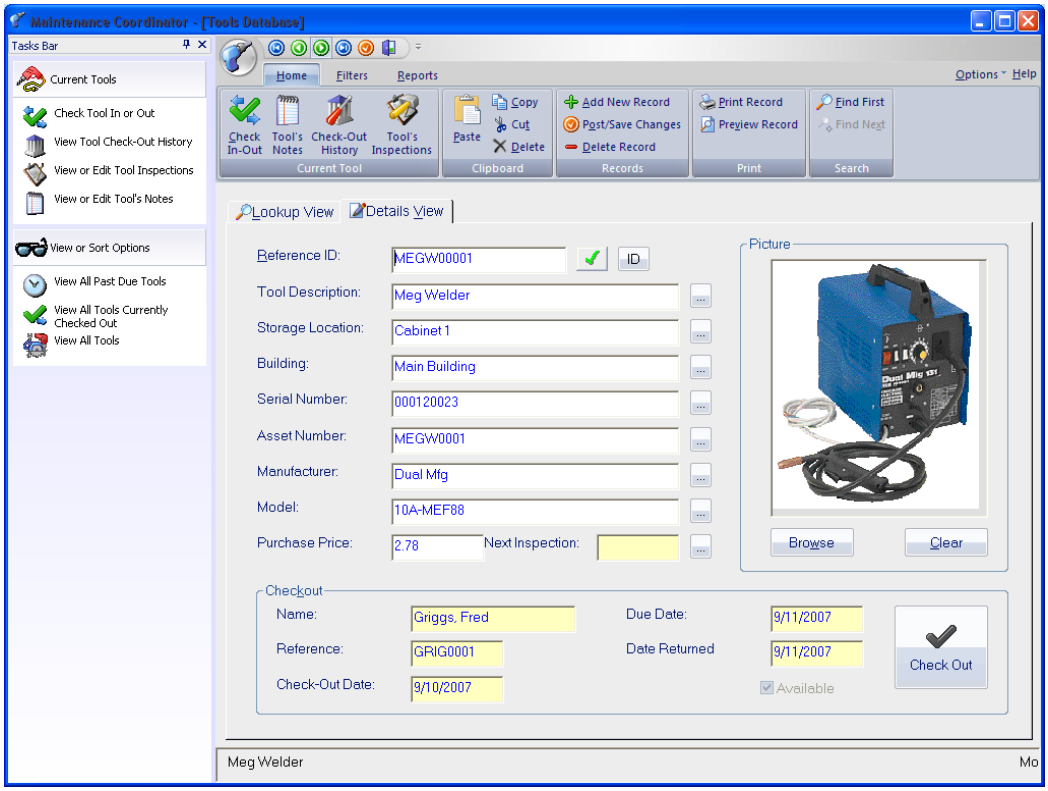
Overview

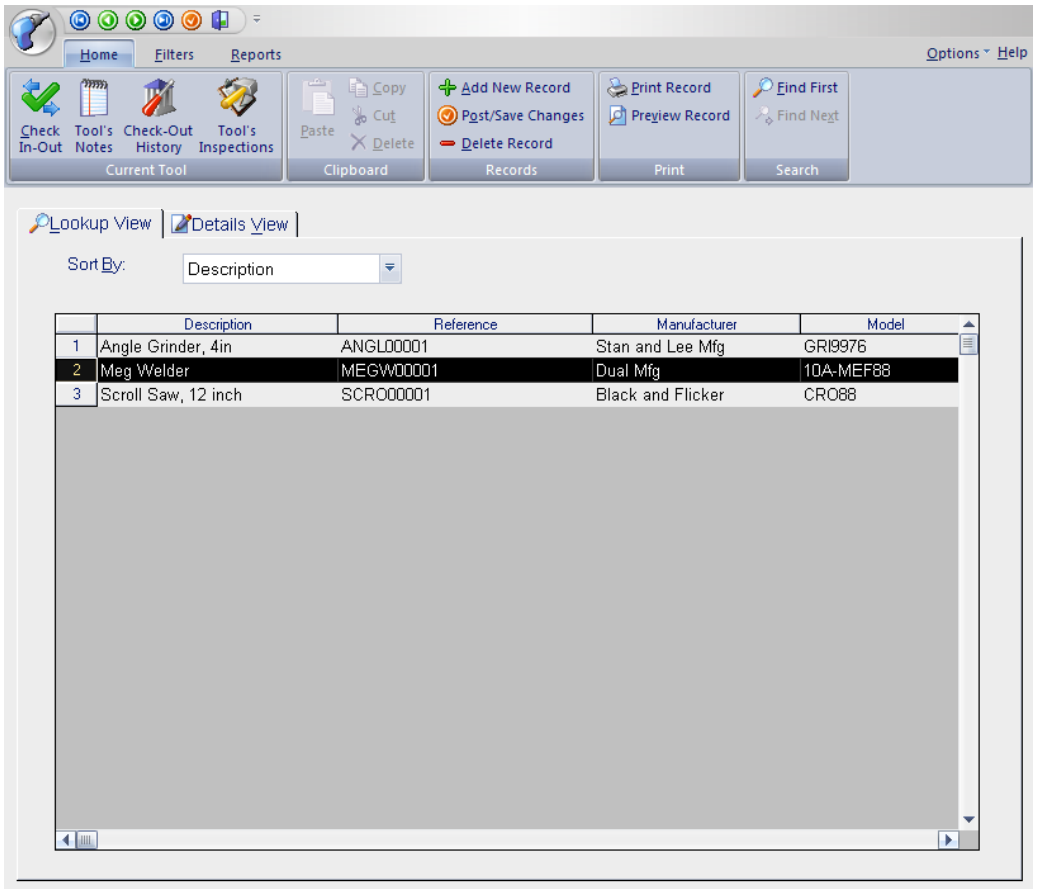
The Tools module was designed to help you keep track of your tools inventory. With this module you can maintain all the important information on each of your tools. This includes the description of the tools, serial numbers, asset numbers, storage locations, a picture of the tool and more. The program tracks the complete check out history of the tool, including when the tool should be returned, and who has it.



This module also tracks the inspection history of your tools. This is valuable, as OSHA requires electrical tools, and such to be inspected at regular intervals. These inspection records can be printed and kept in a safe place to prove compliance to these regulations. By running one of the built in reports the program can flag when these tools are due for re-inspection. Some of the other available reports include tools that are over due for return, all available tools, and all tools currently checked out.

Lookup View

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



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.

Adding a New Tool

To add a new tool:

- Move to the *Home* tab in the and select the *Add New Record* option.
- Move to and click on the *Details View* tab.
- 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.
- Click on the *Post/Save Changes* button in the ribbon to ensure your information is posted back to the database/

Adding a Tool's Picture

To add a picture to your Tool's file:

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

Removing a Tool's Picture

To remove a Tool's picture:

- Locate the Tool's record you want to work with by using one of the lookup routines.
- Move to and click on the *Details View* tab.
- Move to the *Picture* section on the screen and click on the *Clear* button.
- When asked if you are sure that you want to perform this operation, click the *Yes* button.

Deleting a Tool from the Database

To delete a Tool from the database:

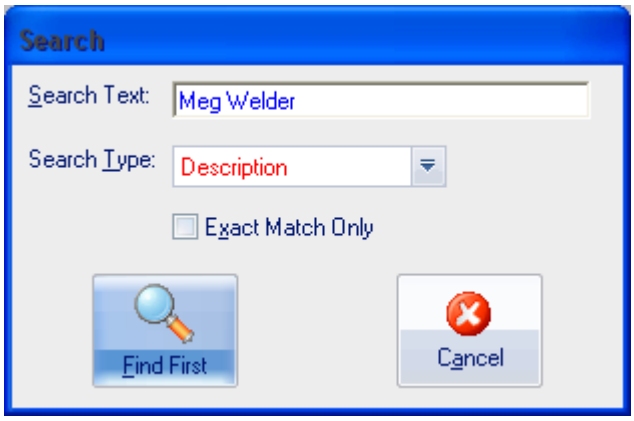
- Locate the Tool's record you want to delete using one of the lookup routines.
- Move to the *Home* tab in the ribbon and click on the *Delete Record* option.
- When asked if you are sure that you want to perform this operation, click the *Yes* button.

Printing a Tool's File

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

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

Searching the Database



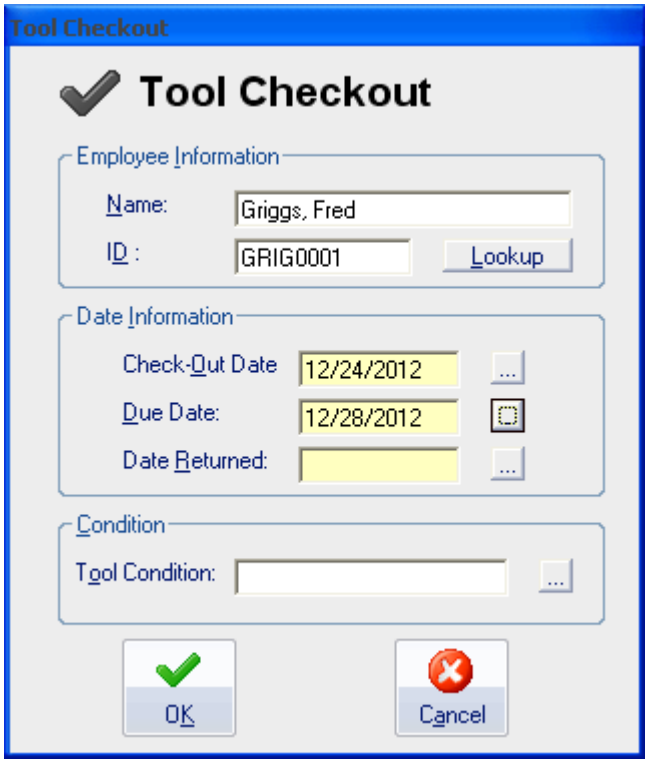
To find a tool:

- Move to the *Home* tab in the ribbon and click on the *Find First* option or click 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* button.

To find additional matches to your search:

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

Checking Out a Tool



To checkout a tool to an employee:

- Locate the Tool's record you want to checkout using one of the lookup routines.
- Move to the *Home* tab in the ribbon and select the *Check In-Out* option.
- In the *Employee* section type in the person's name and reference in the spaces provided, or click on the *Lookup* button.
- Locate and select the person you are checking the tool out to from within the grid. You can also use the *Find* and *Find Next* routines to locate the desired person. This works in the same way as the tools Find function explained earlier. This grid contains all the mechanics as setup in the Mechanics database.
- Click the *Select* button.
- Click the … button next to the *Check-Out Date* field.
- Select the correct date from within this calendar, and then click the Select Date button.
- Repeat the process for the *Due Date* field.
- Move to and click the *OK* button.

Returning a Tool

To check-in a tool:

- Move to the *Home* tab in the ribbon and select the *Check In-Out* option.
- Click the … button next to the *Check-In Date* field.
- Select the correct date from within this calendar, and then click the *Select Date* button.
- Move to the *Tool Condition* field and type in the condition you feel the returned tool is in, such as excellent, good, damaged, etc.
- Move to and click the *OK* button.

Accessing the Notes Section

Each tool in your database can have it's own notes attached to its file. Use these notes to record whatever information you would like at the particular tool. These notes are actually part of an internal word processor with many professional features.

To access notes:

- Click on the *Home* tab in the ribbon and select the *Tool's Notes* option.

For more information on using the editor associated with these notes, please refer to the *Word Processor* chapter.

Checkout History

Each tool maintains a checkout history for that tool. Information recorded in this history database are the dates the tool was checked out, return dates, the person that checked out the tool, their reference ID, and the condition of the tool when it was checked back in. This information can be of value when trying to identify when a tool was missed used, and so on.

To view the checkout log:

- Locate the Tool's record you want to view the history on by using one of the lookup routines.
- Click on the *Home* tab in the ribbon and select the *Check-Out History* option.
- Use the scroll bars or data control to move through the records.

Printing the Check-Out History

To print the complete checkout history for a tool:

- Locate the Tool's record you want to view the history on by using one of the lookup routines.
- Click on the *Home* tab in the ribbon and select the *Check-Out History* option.
- Select the *History Report* option in the ribbon.
- From the *Report Preview* screen click the icon of a printer

Deleting a Check-Out History Entry

To delete a record from the Checkout History log:

- Locate the Tool's record you want to view the history on by using one of the lookup routines.
- Click on the *Home* tab in the ribbon and select the *Check-Out History* option.
- Using the scroll bars or data control locate the record you want to delete from within the grid. Click on this record to select it.
- Select the *Delete Record* option in the ribbon.
- Follow on screen instructions.

Deleting a Date Range from the Check-Out History Log

As you use the database for sometime, your checkout logs may grow to be quite large. For this reason we have provided you with a way of deleting many records at once.

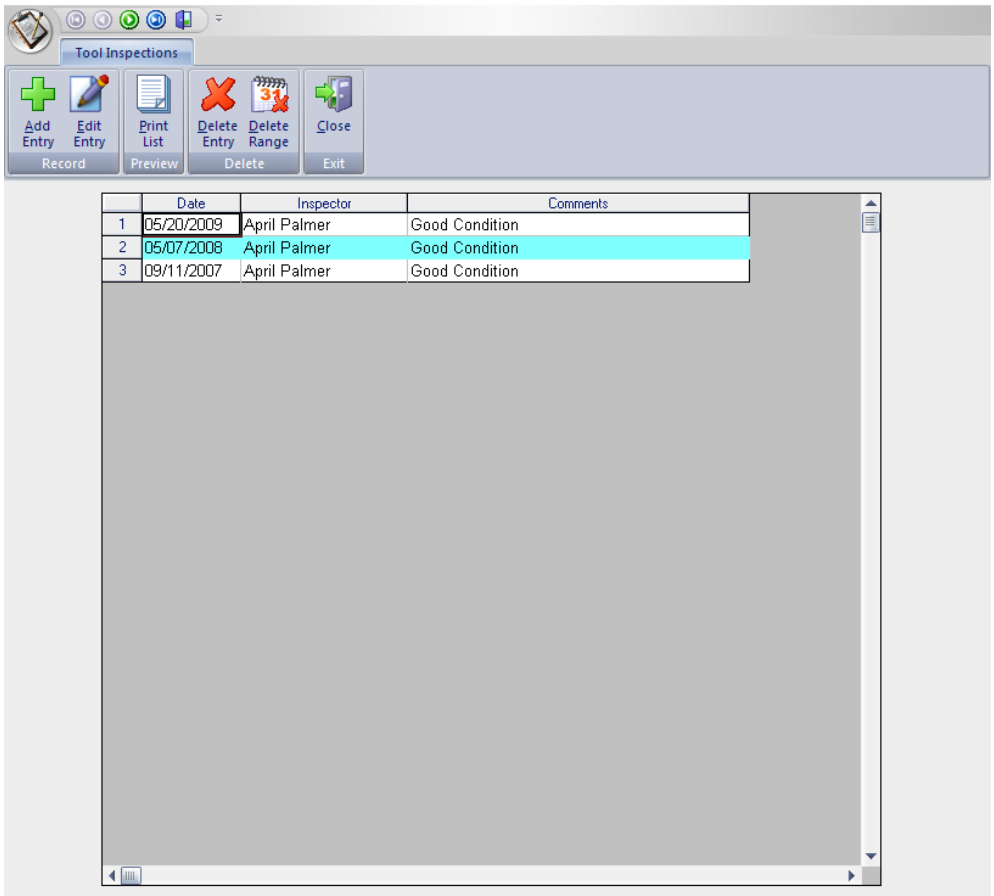
To delete a date range of records:

- Click on the *Home* tab in the ribbon and select the *Check-Out History* option.
- Select the *Delete Range* option in the ribbon.
- Select the ending date for the deletion from the calendar, and then click the *Select Date* button.
- When asked as to whether you want to continue, click the *Yes* button.

Notice: All records on and before the date selected will be deleted from the database.

Inspections

As you know, tools need to be inspected at regular intervals to ensure their safe use. This is especially true when dealing with power tools, etc. I even believe you'll find an OHSA regulation or two dealing with this subject. With the built in inspection handling routines you'll find that keeping these inspections up to date is much easier to do than maybe originally thought.



With the inspections routines contained in this module you'll be able to set at what interval these inspections should take place. Keep a record of all past inspections, and by running one of the available reports, see what inspections are either coming due, or over due.

Setting Up the Default Days between Inspections

To setup the default days between tool inspections:

- Click on the *module* button and select the *Days between Inspections* option.
- Type in the default value you want to setup in the space provided, in days.
- Click the *OK* button.

Recording a New Inspection Record

To record a new inspection record:

- Locate the tool that contains the records you want to record an inspection for by using one of the lookup methods.
- From the *Home* tab of the ribbon select the *Tool's Inspections* option.
- From the *Tool Inspections* tab click on the *Add Entry* option.
- Click the … button adjacent to the *Inspection Date* field.
- Select the inspection date from within the *Calendar* and then click the *Select Date* button.
- Move to by the *Inspected By* and *Comments* fields and type in the appropriate information.
- Click the *OK* command button.

Note: That when a new inspection has been recorded, the next inspection date will be automatically calculated for you. This new inspection date is the date of the inspection plus the default days between inspections that you have setup. This new or *Next Inspection* date is displayed on the *Details* tab.

View or Edit an Inspection Record

To view or edit an existing inspection record:

- Locate the tool that contains the records you want to record an inspection for by using one of the lookup methods.
- From the *Home* tab of the ribbon select the *Tool's Inspections* option.

- Locate the record you want to edit from within the grid, and click on the record to select it.
- From the *Tool Inspections* tab select the *Edit Entry* option or click the *Edit* icon in the toolbar.
- Edit the record by changing the fields to reflect the changes you want to make.
- Click the *OK* button.

Print an Inspection Record

To print a tool's inspection record:

- Locate the tool that contains the records you want to record an inspection for by using one of the lookup methods.
- From the *Home* tab of the ribbon select the *Tool's Inspections* option.
- From the *Tool Inspections* tab click on the *Print List* option.
- Move to and click on the icon of a printer.

Delete an Inspection Record

To delete a record for a tool's log:

- Locate the tool that contains the records you want to record an inspection for by using one of the lookup methods.
- From the *Home* tab of the ribbon select the *Tool's Inspections* option.
- Locate and then click on the record you want to delete from within the grid.
- From the *Tool Inspections* tab select the *Delete Entry*.
- Click on the *Yes* button when prompted as to whether you want to continue or not.

Delete a Date Range of Inspection Records

To delete a date range of records:

- Locate the tool that contains the records you want to record an inspection for by using one of the lookup methods.
- From the *Home* tab of the ribbon select the *Tool's Inspections* option

- From the *Tool Inspections* tab select the *Delete Range* option.
- Select the ending date for the deletion from the calendar, and then click the *Select Date* button.
- When asked as to whether you want to continue, click the *Yes* button.

Notice: All records on and before the date selected will be deleted from the database.

Filtering the Database

There are a few different ways if filtering the database to allow to see just the items you want to view.

To filter the database:

- Move to and click on the *Filters* tab in the ribbon.
- Select the option of your choice that best describes how you filter the records.

All Past Due Tools Report

This report returns all the tools that are currently checked out and over due for return.

To create a All Past Due Tools Report:

- Move to and click on the *Reports* tab in the ribbon.
- Select the *All Past Due* option in the *Checked Out* group.

All Currently Checked Out Tools Reports

This report returns all the tools that are currently checked out.

To create an All Currently Checked Out Tools Report:

- Move to and click on the *Reports* tab in the ribbon.
- Select the *All Checked Out* option in the *Checked Out* group.

All Currently Available Tools

This report returns all the tools that are currently available for checked out.

To create an All Currently Available Tools Report:

- Move to and click on the *Reports* tab in the ribbon.
- Select the *All Available* option in the *General Lists* group.

All Tools Report

This report returns all the tools, checked out, or otherwise.

To create an All Tools Report:

- Move to and click on the *Reports* tab in the ribbon.
- Select the *All Tools* option in the *General Lists* group.

Up Coming Inspections Report

This report will show all inspections that are due to be performed that fall before a date that you specify. The reports can be used to both report on or up coming inspections, and on past due inspections.

To create a Inspections Coming Due report:

- Move to and click on the *Reports* tab in the ribbon.
- Select the *Upcoming Inspections* option in the *Inspections* group
- Select the ending date from within the calendar by clicking on it.
- Click the SELECT DATE command button.

MAINTENANCE COORDINATOR SYSTEM

Procedures and Solutions

SIMPLICITY
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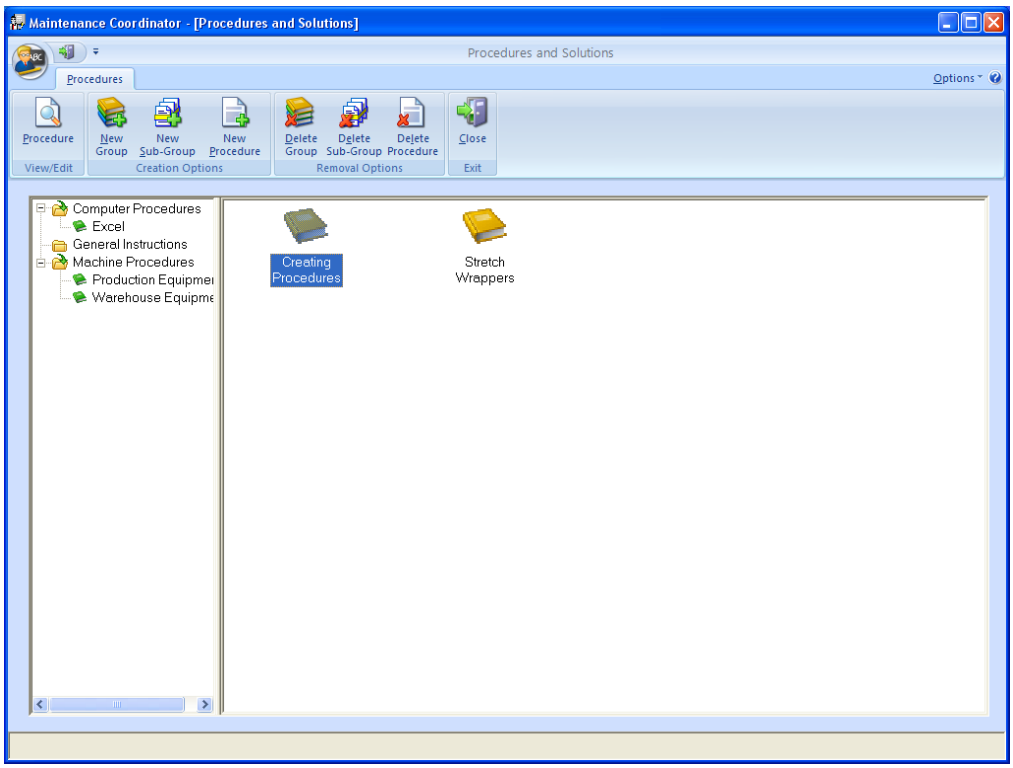
Overview

One thing I'm sure any maintenance department could use is a database full of Troubleshooting procedures and other related information. Well, with the *Maintenance Coordinator's Procedures and Solutions* module we allow you to build just this. With this module you can begin building a complete database full of useful procedures. In this way as mechanics learn new techniques on a machine, they go to this module and enter this information. As other mechanics work on the same machines they return to this module and look up these procedures for their own personal use.



The more information that can be shared between members of you maintenance and production teams the better. If someone has solved a complex problem before, and that problem arises again with a different person, wouldn't it be nice to know what the other person did when they fixed it? Of course it would. Knowing what the other person did could save a lot of down time by already knowing a couple of possible fixes.

This module allows you to breakup your procedures under a couple of different categories for easy identification and retrieval. These categories are first grouped by *Group*, then by *Sub-Groups*, and finally by the procedures themselves. For example, you could have something setup like the following:

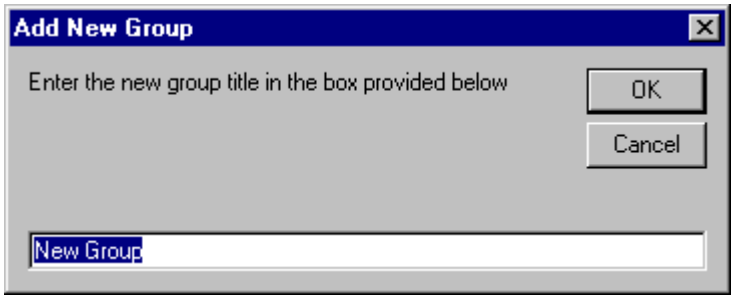
Group:	Forklifts
Sub-Group:	Brakes
Procedure:	How to install new brake shoes

With the above example you could also have a procedure titled, *Testing to See If You Need New Brake Shoes*, or *Rebuilding the Master Cylinder*. As you can see this module could prove to be quite useful once procedures have been entered into the database.

Creating Procedures

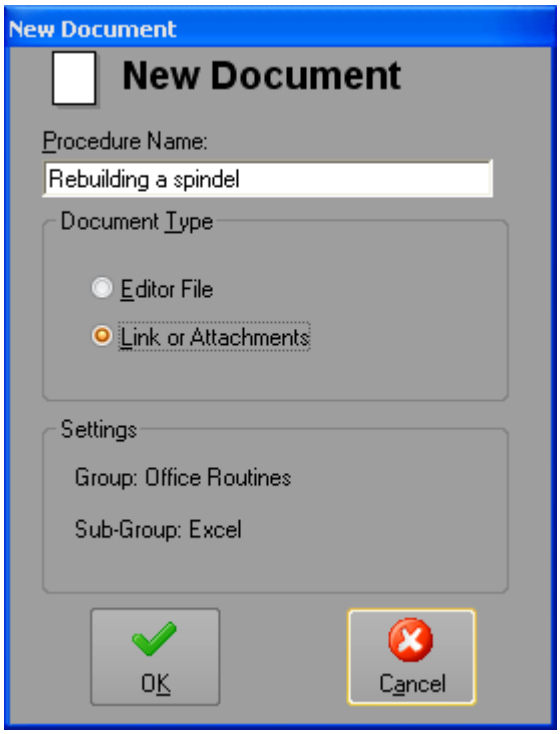
Before your employees can start accessing procedures, you first need to enter them into the database. The following procedure or exercise will explain the steps in entering a new procedure into the database.

To create a new procedure:



- Move to the *Creation Options* group in the ribbon and click on the *New Group* option.
- Now type in the name of your group in the box provided. Examples here could be Chillers, Forklifts, and Palletizers and so on.
- Next we need to add a sub-group. Do this by first clicking on the *Group name* from within the list located to the left of the screen.
- Now move to the *Creation Options* group in the ribbon and click on the *New Sub-Group* option
- Enter the sub group name in the box provided. Examples here could be Main Drive Motor or General Procedures.
- Next we need to add the procedure itself. To do this first select the Group from within the Tree list, and then the sub-group.

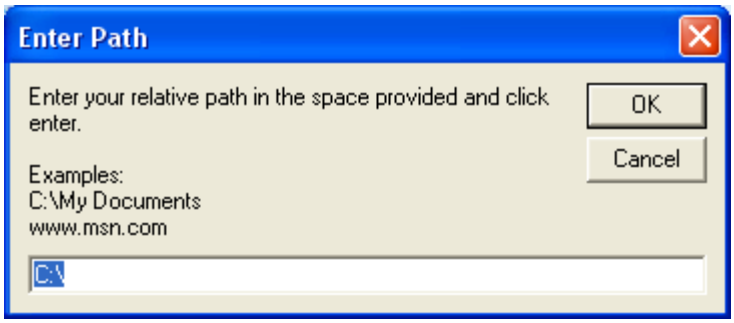
- Move to the *Creation Options* group in the ribbon and click on the *New Procedure* option.



- Type in the new procedure title in the box provided. Examples here could be Troubleshooting the Main Motor, Replacing the Main Circuit Board, or General Troubleshooting Procedures.
- Move to the *Document Type* section and select one of the options available here.
    - *Editor File* – This type of document uses the internal word processor for document creation.
    - *Link or Attachment* – This type of document links itself to almost any type of external document. This can be word processor documents, pictures files, and a web-site and so on.
- Click on the *OK* button.

LINK OR ATTACHMENTS

- If you created a Link type document then you will be shown an Open type dialog screen. Use this dialog to browse to where the document is residing, selecting the file, and clicking on the *Open* button.
- If you want to use a relative path, such as a link to a folder, or web site for example, click on the *Cancel* button,



- Now enter the relative path in the space provided, and click on the *OK* button.

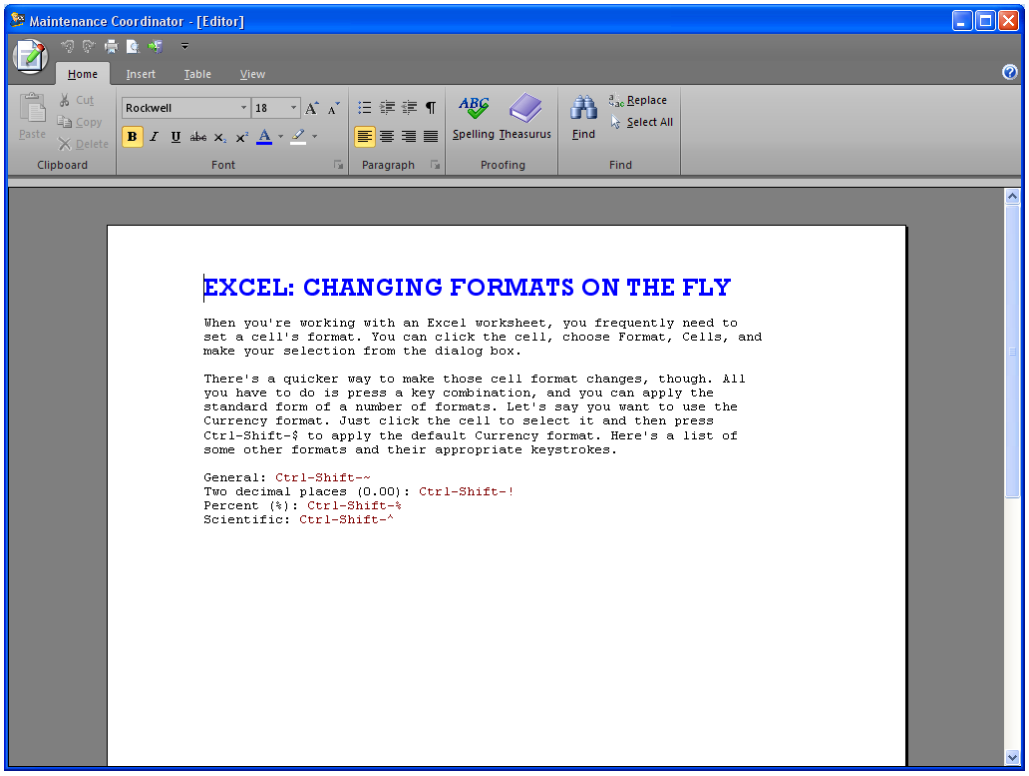
INTERNAL DOCUMENTS

- If you created an internal or Editor type document move to the list view to the left of the screen and click on the *Procedure* title you've just created.
- Now either double click on this icon or click on the *Procedure* button in the ribbon's *View/Edit* group.
- Now you should be placed into the Procedure editor where you can edit your procedure. To find how to use the features of this word processor please refer to the *Word Processor* chapter.

NOTE ABOUT ATTACHMENTS

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

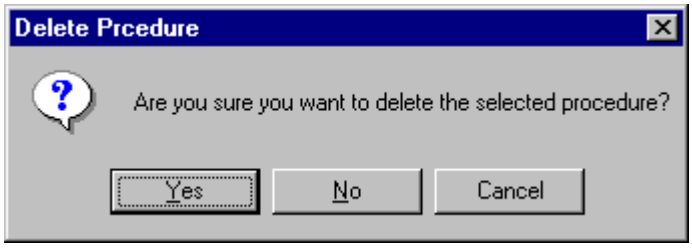
Viewing Procedures



To view or edit a stored procedure:

- From the *Procedures* main screen move to the *Tree View* located to the left of your screen and then click on appropriate group name.
- Move to and click on the sub-group of your choice from under this group.
- Move to the *Procedures List* and click on the procedure title of your choice.
- Click on the *Procedure* option in the *View/Edit* group of the ribbon.

Deleting Procedures



To delete procedures from within the database:

- Select the procedure you wish to remove from the database from those listed in the *Procedures* list.
- Move to the *Removal* group in the ribbon and select the *Delete Procedure* option.

Deleting Sub-Groups

To delete a sub-group category:

- Before a sub-group can be deleted all procedures assigned to that sub-group must first be deleted. Please refer to the *Deleting Procedures* section for the proper method on doing this.
- Next select the sub-group that you wish to remove from the database from within the *Tree View* list.
- Move to the *Removal* group in the ribbon and select the *Delete Sub-Group* option.

Deleting Groups

To delete a group:

- Delete all *Procedures* associated with the desired Group.
- Delete all *Sub-Groups* associated with the Group.
- Select the Group title from those found in the *Tree View* list.
- Move to the *Removal* group in the ribbon and select the *Delete Group* option.

Using the Procedures Editor

The editor used for the procedures is actually a small word processor, and contains many of the features of commercial word processing programs. To find how to use the features of this word processor please refer to the *Word Processor* chapter.

MAINTENANCE COORDINATOR SYSTEM

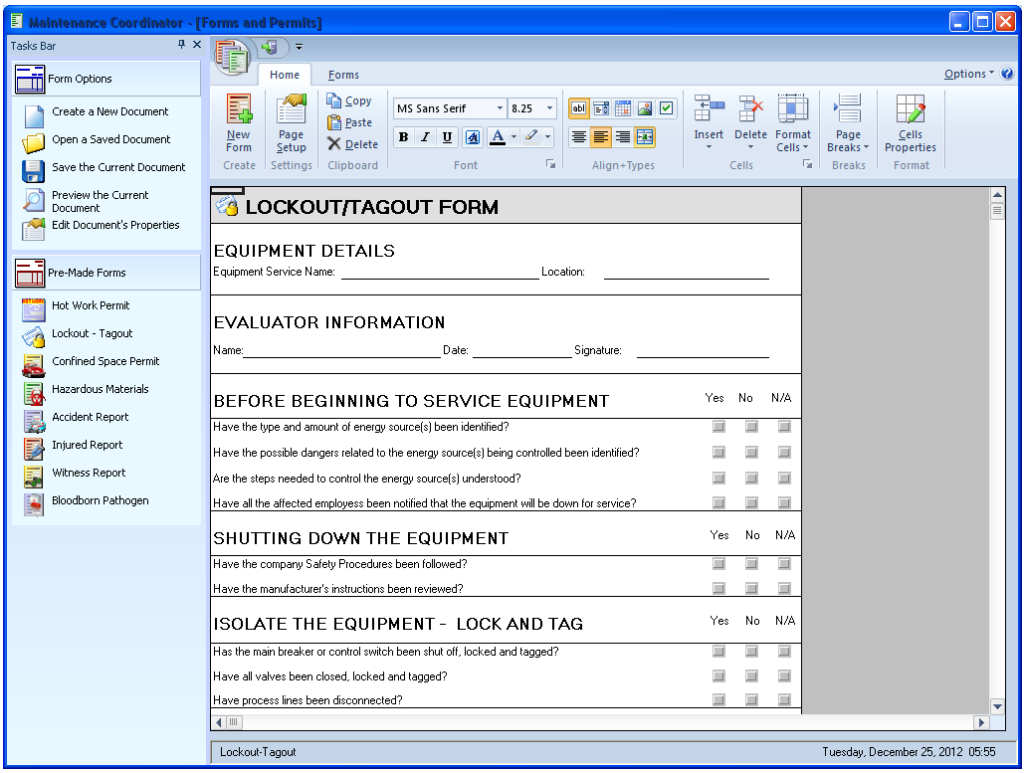
Forms and Permits

SIMPLICITY
Software Technologies Inc.

Table of Contents

Overview

We are aware that many organizations require certain Forms and Permits to be used in their day-to-day operations. We have included what we would consider the most popular of these documents with this module. We also know that many of you may have other requirements, and for this reason we give you the ability to create your own Forms and Permits.

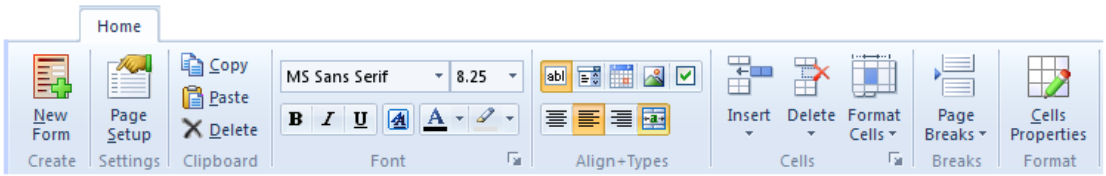


The forms included with this module were created using this module, and should give you a pretty good idea of what can be done. This module uses a spreadsheet type control as its base. The cells of this control can be setup to use different cell types, which makes it ideal for creating forms. Cells can be set as normal text or edit cells, date cells with popup calendars, combo box cells where you can setup choices, and picture cells where you can use bitmaps and icons.

Besides the ability of setting up and using different cell types, you also have many formatting options at the cell level. You can specify the fonts, fore and back ground colors, text overflow, and more. So if your organization can use a form tool, we are happy to be able to supply you with simple to use, yet powerful tool.

Understanding the Ribbon's Home Tab

The following elements are found in the ribbon, reading left to right, top to bottom:



- *New Form* – Clears the current document in preparation of creating a new one.
- *Page Setup* – Calls the *Page Setup* dialog.
- *Copy* – Sets the selected cells to be copied.
- *Pastes* – Pastes the information set for copy into new cells.
- *Delete* – Deletes a cell's contents.
- *Font Combo* – Sets and displays selected font name or types.
- *Size Combo* – Sets and displays selected font point sizes.
- *Bold* – Sets and displays selected font text bold characteristics.
- *Italic* – Sets and displays selected font text italic characteristics
- *Underline* – Sets and displays selected text underline characteristics.
- *Font* – Allows you to set various font characteristics.
- *Foreground Color* – Specifies the foreground color of selected text.
- *Background Color* – Specifies the background color of selected text.
- *Edit Cells* – Set the selected cells as text or edit cells.
- *Combo Cells* – Allows you to insert a combo or drop down list into the selected cell.
- *Date Cells* – Set the selected cells as *Date Cells.*
- *Picture Cells* – Allows you to insert a picture into the selected cell.
- *Checkmark Cells* – Allows to insert a checkbox into the selected cell.
- *Center* – Makes the text in selected cells, center aligned.
- *Left Align* – Makes the text in selected cells, left aligned.
- *Right Align* – Makes the text in selected cells, right aligned.
- *Cell Overflow* – Allows selected cells to overflow into adjacent cells.
- *Properties* – Opens the *Page / Document* setup screen.
- *Cells Insert* – Displays options of inserting a new row or column into the document.
- *Cells Delete* – Displays options of deleting rows or columns from the document
- *Format Cells* – Displays options for column width, row height, and column header text.
- *Page Breaks* – Allows adding and removing document page breaks.

- *Cells Properties* – Allows you to set various cell properties such as borders, colors and more.

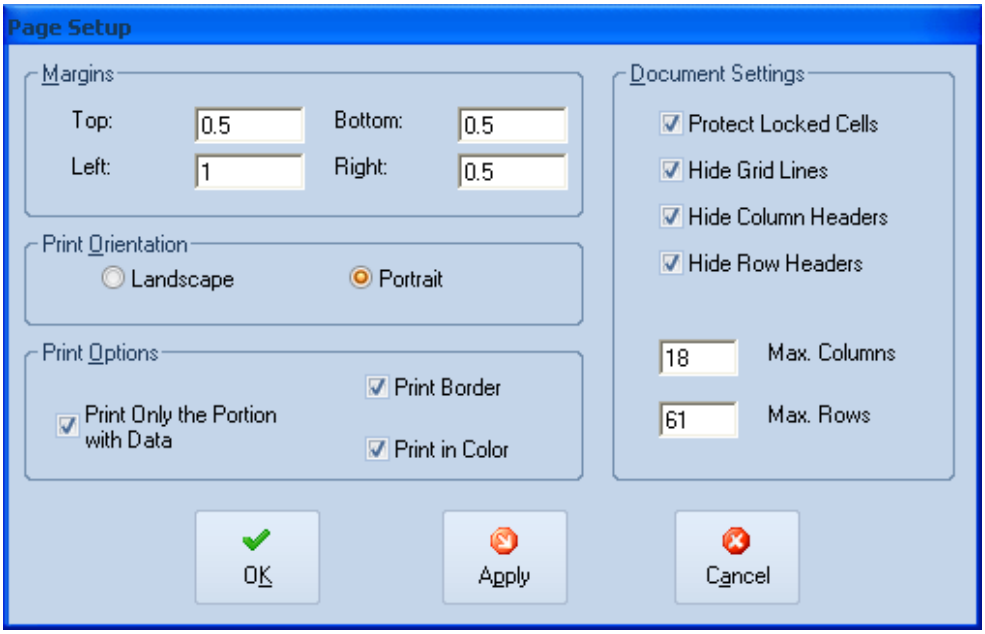
Creating a New Form

To clear the current document in preparation of creating a new one:

- Click on the *New Form* option in the ribbon.
- When prompted about proceeding, click the *Yes* button.

Setting the Page or Document Properties

To setup the page or document properties:



- Click on the *Page Setup* option in the ribbon.
- Move to the *Margins* section and setup the 4 page margins located here. These margins are setup in inch values. Where .5 would be the same as half an inch.
- Move to the *Print Orientation* section and select how you want the document printed, *Landscape* or *Portrait* modes.
- Move to the *Print Options* section.
- To have the program print only the portion of the document with data, place a checkmark in the *Print Only the Portion with Data* checkbox.

Leaving this unchecked will print the entire document regardless if the cells contain any data or not.

- To have the program print a border around the entire document, place a checkmark in the *Print Border* field.
- To have the program print the document in color, place a checkmark in the *Print in Color* checkbox. Leaving this unchecked, the document will be printed using gray scales.
- Move to the *Documents Settings* section.
- To protect cells that have been set as protected or locked, move to and place a checkmark in the *Protect Locked Cells* checkbox.
- To hide the grid lines within the document, move to and place a checkmark in the *Hide Grid Lines* checkbox.
- To hide the column headers within the document, move to and place a checkmark in the *Hide Column Headers* checkbox.
- To hide the row headers within the document, move to and place a checkmark in the *Hide Row Headers* checkbox.
- To specify the number of columns available in the document, move to and change the amount in the *Max. Columns* field.
- To specify the number of rows available in the document, move to and change the amount in the *Max. Rows* field.
- To see your changes without closing this screen, click the *Apply* button.
- To apply your changes and at the same time close this screen, click the *Ok* button.

Print Preview

To receive a print preview of your document:

- Click on the *Module* button then move over the *Print* option.
- Click on the *Print Preview* option.
- For more information on this print preview please refer to the *Common Features* chapter.

Print the Document

To print the document:

- Click on the *Module* button then move over the *Print* option.
- Click on the *Print Document* option.

Opening a Saved Form or Permit

To open a saved document:

- Click on the *Module* button and select the *Open* option.
- Use the *File Open* dialog to locate the file, and select it. Click *Open*.

Saving a Document

To save a form or permit:

- Click on the *Module* button and select the *Save* option.
- Move to the *Save as File Type* list box and select how you want the file saved. Available options here are the default style or SS, Excel 5 style or XLS, HTM or Internet documents, or tab delimited text files or TXT.
- Move to the directory you want to save your file to, type in the file name, and click *Save.*

Exiting this Module

To exit this module:

- Click on the *Module* button and select the *Close Forms and Permits* option.

Selecting Cells to be Copied

This application does not copy cells into the clipboard, but rather marks cells to be copied. When a paste operation is used, a copy of the marked cells is copied into the new cells.

To copy cells:

- Select the cells that will be affected.
- Click on the *Copy* option in the ribbon. These cells will then be set for a paste operation, and will remain set until a new range has been selected.

Pasting Cells

To paste cells that has been marked.

- Select the cell or cells you want to paste to.
- Click on the *Paste* option in the ribbon.

Clearing Cells

To clear a cell or range of cells of all contents and formatting:

- Select the cell or cells to be affected.
- Click on the *Delete* option in the ribbon.

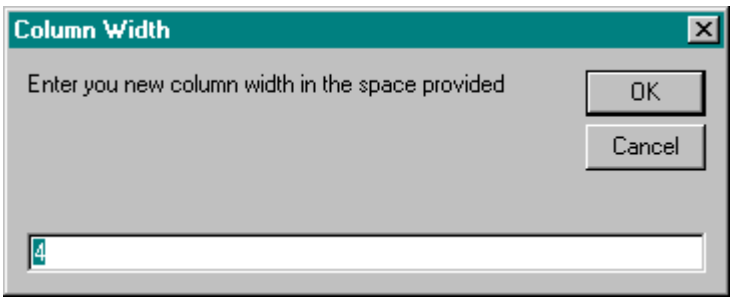
Setting Cells Width

To change the width of a cell or cells:

Method One

- With the column headers showing, place your mouse over the header where it separates two columns, and the mouse cursor changes to resizing handles (double lines and two sided arrows).
- Left mouse click and hold the mouse button down, at the same time moving the mouse in the direction you want the cell to grow or shrink.

Method Two



- Select the column or columns you want to resize.
- Click on the *Format Cells* option in the ribbon followed by the *Set Cell(s) Width* option.
- Types in your new value in the space provided and click the *Ok* button.

Setting a Row's Height

To change the height of a cell or cells:

Method One

- With the row headers showing, place your mouse over the header where it separates two rows, and the mouse cursor changes to resizing handles (double lines and two sided arrows).
- Left mouse click and hold the mouse button down, at the same time moving the mouse in the direction you want the cell to grow or shrink.

Method Two

- Select the row or rows you want to resize.
- Click on the *Format Cells* option in the ribbon followed by the *Set Row(s) Height* option.
- Types in your new value in the space provided and click the *Ok* button.

Inserting a New Column

To insert a new column in your document:

- Select the column just to the right of where you want the insertion to occur by clicking in a cell.
- Click on the *Insert* button in the ribbon followed by *Insert Column to the Left* option**,** and a new column will be inserted for you.

Inserting a New Row

To insert a new row in your document:

- Select the row just below where you want the insertion to occur by clicking in a cell.
- Open the *Format* menu and select the *Insert Row Above* option and a new row will be inserted for you.

Deleting a Column

To delete a column from your document:

- Select the column you want to delete by clicking in any cell in that column.
- Open the *Format* menu and select the *Delete Column* option.

Deleting a Row

To delete a row in your document:

- Select the row you want to delete by clicking in a cell belonging to the row.
- Open the *Format* menu and select the *Delete Row* option.

Inserting a Row Page Break

To insert a page break into your document:

- Select the row you want to insert a page break into by clicking any of the cells belonging to that row.
- Click on the *Page Breaks* icon in the ribbon followed by the *Insert Page Break* option.

Clear All Page Breaks

To clear all page breaks in your document:

- Click on the *Page Breaks* icon in the ribbon followed by the *Clear All Breaks* option.

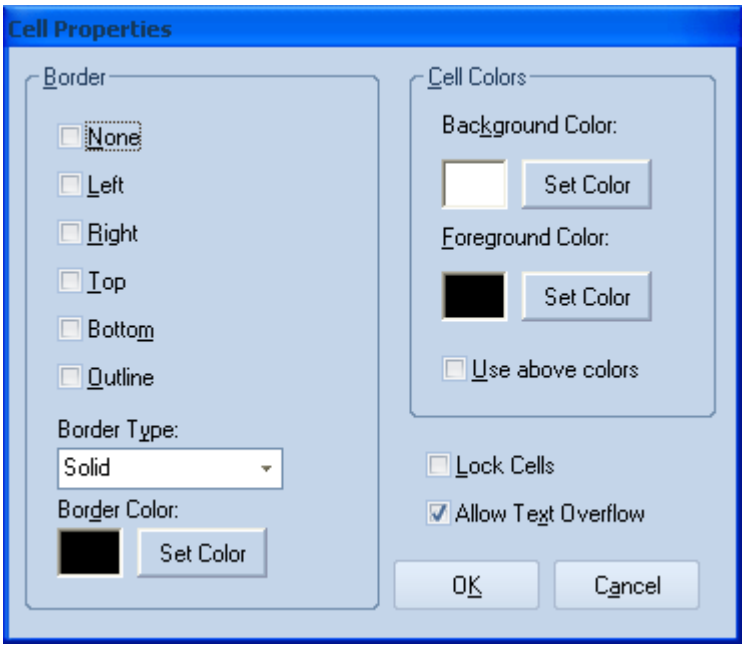
Renaming a Column Header

To rename a column header:

- Select any cell within the column you want to rename by clicking on it.
- Click on the *Format Cells* icon in the ribbon followed by the *Rename Column Header* option.
- Type in the new header information in the space provided, click the *Ok* button.

Changing a Cell's Properties

To change the properties of a cell or a group of cells:



- Select the cell or cells you want to work with.
- Click on the *Cell Properties* option in the ribbon.
- Move to the *Border* section and setup the border you want to apply to the selected cell(s). The options are:
- *None* – Removes any border properties currently assigned to the cell(s).
- *Left* – Places a border to the left side of the selected cell(s).
- *Right* - Places a border to the right side of the selected cell(s).
- *Top* - Places a border to the top of the selected cell(s).
- *Bottom* - Places a border to the bottom of the selected cell(s).
- *Outline* – Places a border along the outside edge of all selected cells.
- Move to *Border Type* drop down box and select the type of *Border* you want to use by clicking on an option found there.
- To specify the color of the borders, move to and click on the *Set Color* button. Select the color of your choice by clicking on it, and then click the *Ok* button.
- Move to the *Cell Colors* section.
- To set the background color of the selected cells move to the *Background* field and click the *Set Color* button.
- Select the color of your choice by clicking on it, and then click the *Ok* button.
- Repeat the above two steps for the foreground or font color.
- To allow the application to use these colors, place a checkmark in the *Use Above Colors* checkbox.
- To allow Text overflow into adjacent fields, place a checkmark in the *Allow Text Overflow* checkbox.
- Click the *Ok* button.

NOTE ABOUT TEXT OVERFLOW
When applied text overflow applies to the whole document, not just a single cell. If a cell is aligned as left aligned, text will overflow into the left adjacent cell or cells. If it's set as right aligned, text will overflow to the right. If a cell's text alignment is set as center aligned, text will overflow to adjacent cells in both directions.

Edit Cell Text

You can edit the contents of a text cell directly on the form, or you can call up an edit screen to help you do this. For long text we recommend the use of the *Edit Cell Editor*.

To open and use the edit cell editor:

- Click on the *Edit Cell* icon in the ribbon, or click on the hot key assignment of the *Ctrl* key and the *T* key at the same time.
- Type or edit the cell's text in the space provided.
- Click the *Accept* button.

Font Characteristics

To setup the Font characteristics:

- Select the cell or cells you want the formatting to effect.
- Open the *Cells* menu and select the *Characters (Font)* option.
- Setup the *Font* to use and the other characteristics to your liking.
- Click the *Ok* button.

Setting the Cell Types

To specify a cell type:

- Select the cell you want to work with by clicking it.
- Open the *Cells* menu. Select the *Cell Types* option and then select the type of cell you want to use. The following cell types are available:
    - *Date Cell* – Set the cell as a date cell, where the user can select a new date from a popup calendar.
    - *Edit (Text) Cell* – This is the default type cell, and would be used for text entry.
    - *Combo Box Cell* – This is a drop down list box, where the user can select from a list of items that you setup.
    - *Picture Box Cell* – This allows you to supply a picture in the cell.

Using a Date Type Cell

Once set, you can change the date of a date cell by:

Method One

- Clicking in that cell.
- Clicking the various parts of the date, and then clicking on the little scroll keys to change the date.

Method Two

- Double clicking in that cell to bring up a calendar.
- Select a date from within this calendar by clicking on it.
- Click the *Ok* button.

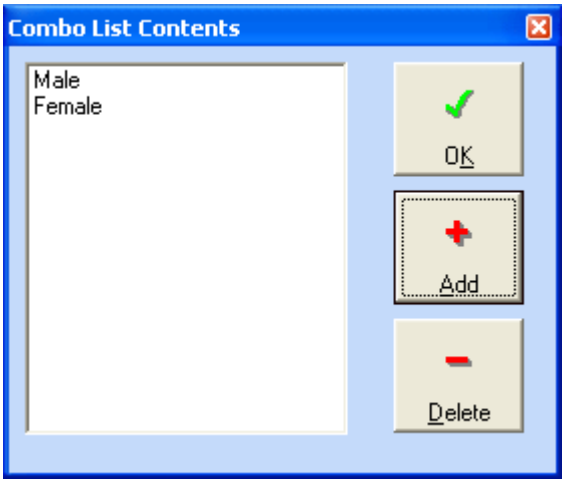
Using an Edit (Text) Cell

Once setup, you can change the text in an edit cell by:

- Typing directly in the cell or by first clicking on that cell, then clicking on the Edit Cell icon in the toolbar.
- Edit the text in the box provided and then click on the *Accept* command button.

Using the Combo Box Cell

Once setup, you can add list item to the combo box by:



- Clicking the combo box cell to select it, then move to the toolbar and click on the Combo Box icon.
- Click the *Add* button to add items to the list. Typing in the item in the space provided and then clicking the *Ok* button.
- Repeat the above step for every item you want to include.
- To remove an item, click on the item from within the list to select it.
- Move to and click on the *Delete* button.
- Once you're done setting up the contents of the combo box, move to and click on the *OK* button.

Picture Cells

When you setup a picture cell you will be given the chance to assign that cell a picture. These cells support bitmaps (bmp) and icon (ico) type images.

To set or change the image of a picture cell:

- Click on the cell you want to work with.
- Move to the toolbar and click on the Picture Cell icon.
- Locate the image you want to use with this *File Open* type dialog.
- Click the *Open* button.

Accessing the Built-in Forms

There are four built in forms that you can use. These include a Hot Work Permit, Confined Space Permit, Hazardous Materials Form and an Accident Report Form.

To access and load the built-in reports:

- Open the *Forms* menu and select the form of your choice by clicking on that option.

MAINTENANCE COORDINATOR SYSTEM

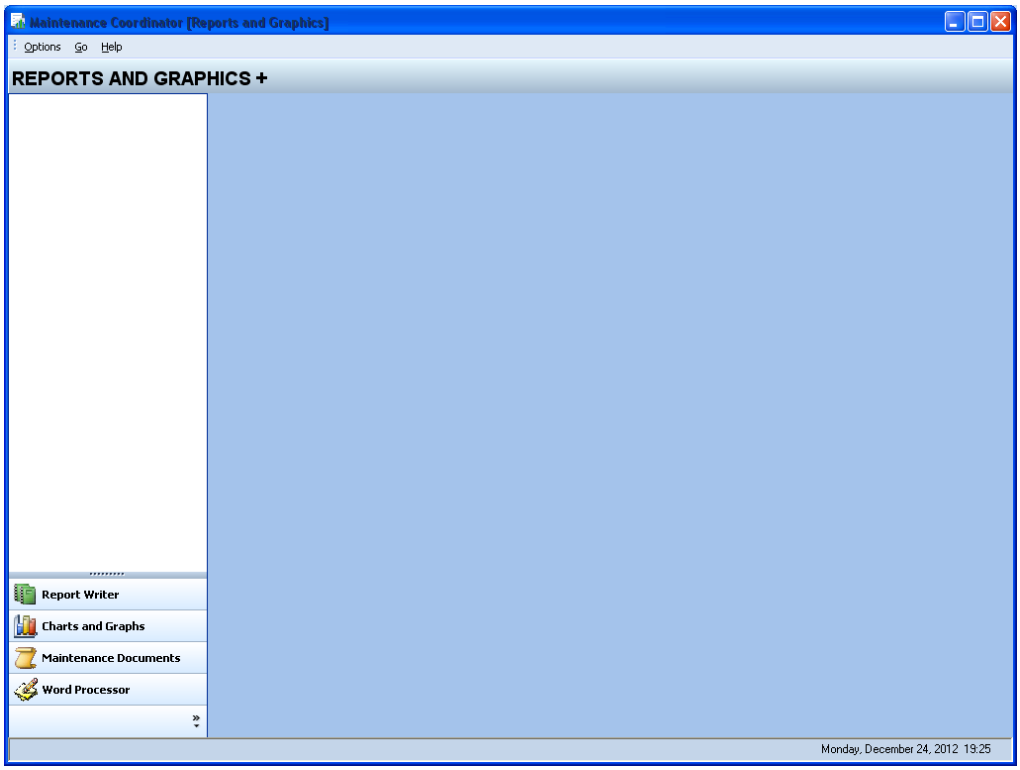
Reports and Presentation Graphics

SIMPLICITY
Software Technologies Inc.

Table of Contents

Overview

This module could actually be considered as four modules in one. The first would be the *Report Writer*. This feature allows you to open an Access database, select a table from that database, select fields from that table, and setup sorting and selection criteria, and then generate a report. This report can then be even further customized with fonts, colors and more. This feature was added to allow users to create their own ad-hoc reports, as I'm sure someone would like a report or two we didn't include.



The second part of this module contains a *Presentation Graphics* designer. This control was supplied to us by and outside vendor, and contains numerous formatting options. You can select from 12 different 3D type charts, and 14 different 2D types. Each chart type then has their own styles associated with them and more. This feature rich control also uses a chart wizard, and most if not all elements of a chart can be used defined. Many people compare this control to the chart control in Excel, but I believe this one has many more features.

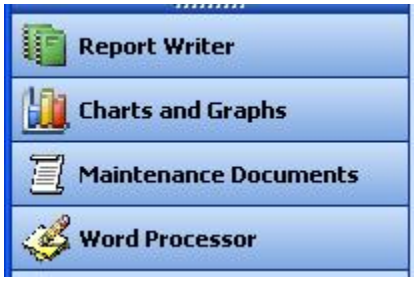
The third part of this module is our *Document Feature*. With this feature you can record and maintain an almost endless amount of editor styled, and picture

styled documents. The editor used here is Microsoft Word compatible and contains many formatting features. This *Document Feature* is also 100 percent compatible with the one found in our *PM Coordinator* application.

The last or fourth module would be the Word Processor. Here you use the same word processor and in the Document Feature, but the documents are not stored to a database. You would use this editor as with most editors, saving the documents to file.

Note: Excel and Word are registered trademarks of the Microsoft Corporation.

Navigating between the Screens



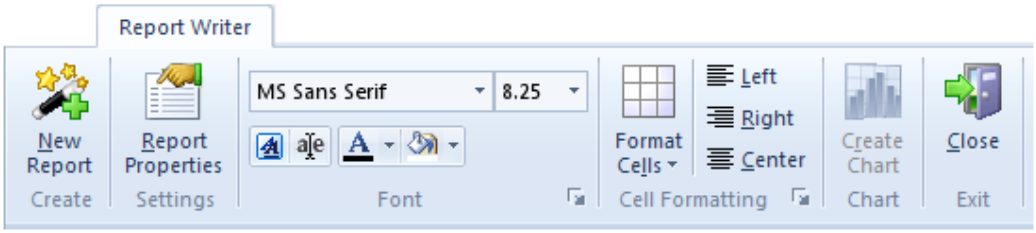
To move from screen to screen, just click the appropriate button in the shortcut bar located on the left hand side of the screen or open the *Go* menu and select the appropriate option.

The following options are on this shortcut bar, reading top to bottom:

- *Report Writer*- Clicking this button moves you to the Report Writer screen
- *Charts / Graphics* – Clicking this button moves you to the Presentation Graphics designer.
- *Documents* – Clicking this button moves you to the Document screen.
- *Word Processor* – This is a stand alone work processor for the creation and reading of rich text documents.

Understanding the Report Writer's Ribbon

The following elements are found on the ribbon reading left to right, up to down:



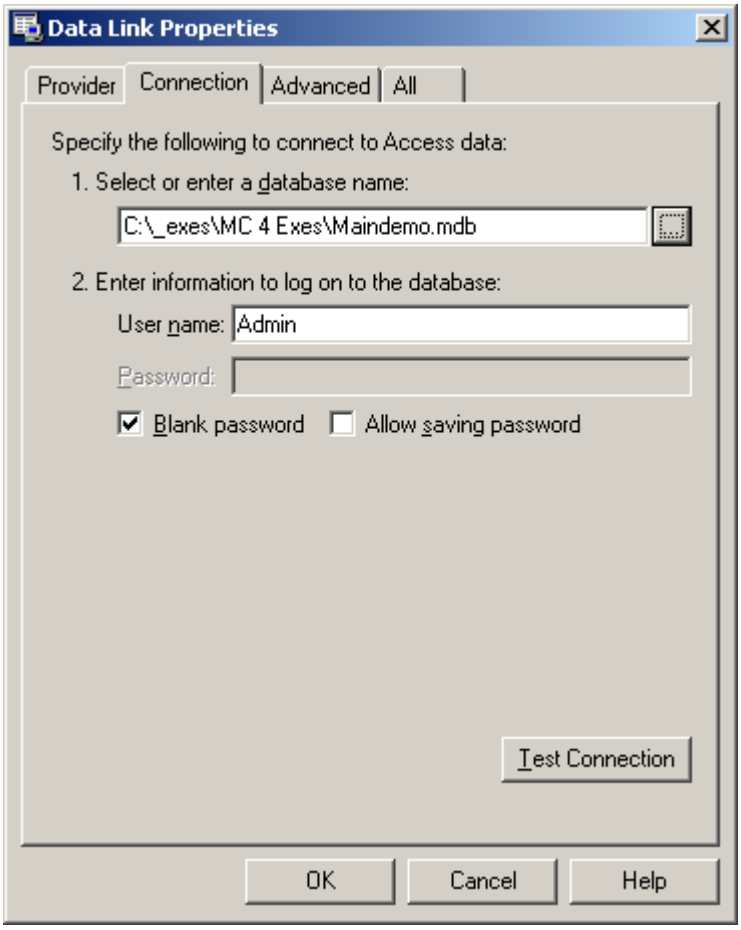
- *New Report* - Calls the *Report Creation Wizard* in preparation of creating a new report.
- *Report Properties* – Opens the report properties dialog screen.
- *Font Combo* – Sets and displays selected font name or types.
- *Size Combo* – Sets and displays selected font point sizes.
- *Font* – Allows you to set various font characteristics.
- *Rename Header* – Allows you to rename the header information of the selected column.
- *Foreground Color* – Specifies the foreground color of selected text.
- *Background Color* – Specifies the background color of selected text.
- *Format Cells* – Allows you to setup cell properties, such as borders and colors.
- *Left Align* – Set selected text as left aligned.
- *Right Align* – Set selected text as right aligned.
- *Center Align* – Set selected text as centered aligned.
- *Create Chart* – Allows you to create a chart or graphic from selected cells.
- *Close* – *Exits* this screen.

Creating a New Report

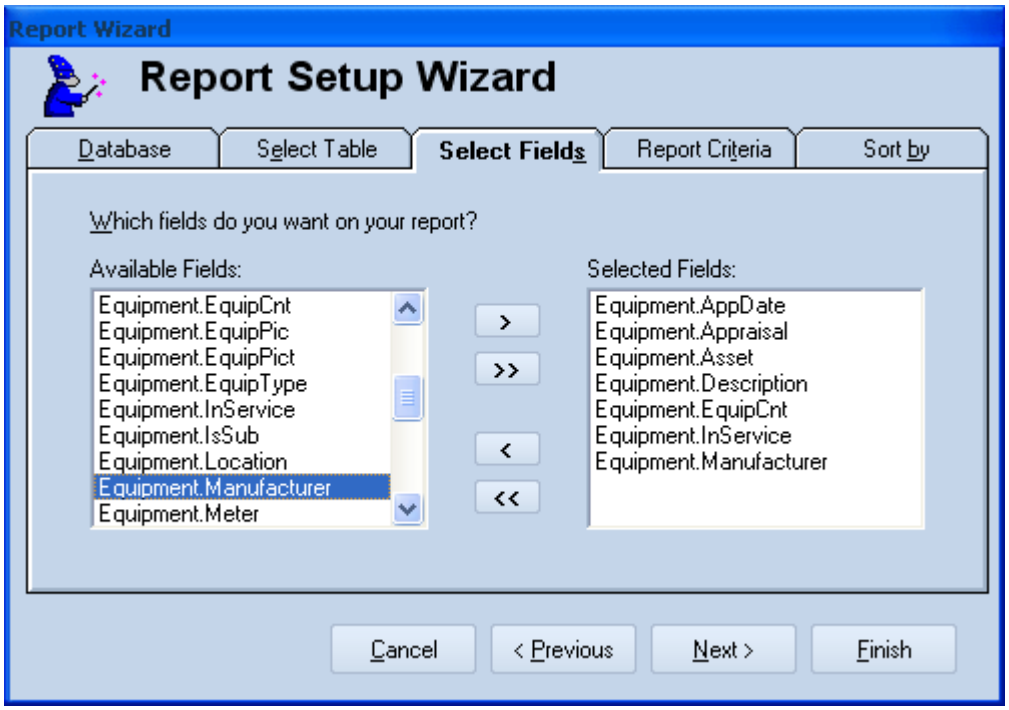
To create a new report:

- Open the *Go* menu and select the *Report Writer* option.
- Click on the *New Report* icon in the ribbon
- From the *Database* tab, click on the *Database Connection* button.

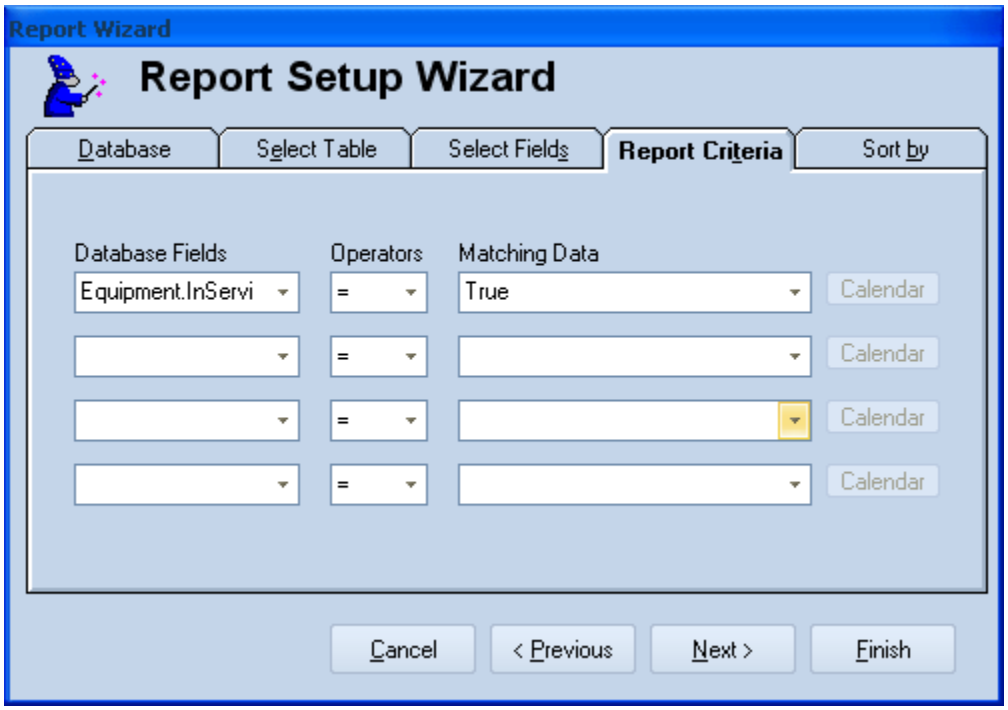
- From the *Data Link Properties* dialog, move to the *Provider* tab by clicking on it.
- From the list click on *Microsoft Jet 4.0 OLE DB Provider* option.
- Click the *Next* button.



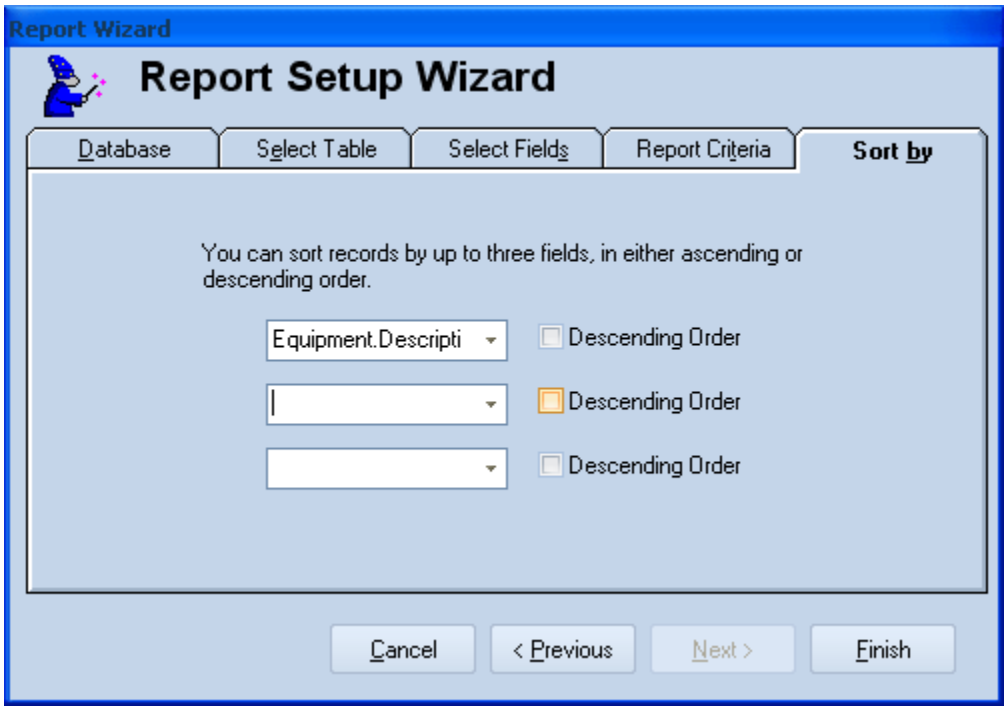
- Click on the … button adjacent to the *Select or enter a database name* text box.
- Use this file open type dialog to select the database that you want to base your report on. Click *Open*.
- Click either *Next* or the *Select Table* tab.
- The drop down list here will contain all tables found within the selected database. Move to this list and select the table you want to base your report on by clicking on it.
- Click either the *Next* button or the *Select Fields* tab.
- All the database fields from the selected table will be displayed on the left. You now need to select the fields to include in your report.



- To select one field at a time, move to the list and click on the field title of your choice, next move to and click on the > button to move the field to the right list. Double clicking on a field will also move it to the right list.
- To move all the fields to the right list (*Selected Fields)*, and have them all included in the list, click on the >> button.
- To remove selected fields from the report, reverse the selection process using the < and << buttons.



- Click either *Next* or the *Report Criteria* tab. Information setup on this tab is optional.
- Move to the top most *Database Fields* drop down and select a field to use as a selection filter.
- Move to the *Operator* drop down and select an operator to use with the selection criteria you are setting up.
- Move to the *Matching Data* field and setup the filtering criteria. Sample data is included in the drop down list. If the field is a date field, you can select a date by clicking on the … button adjacent to that field.
- If you want, you can repeat the above 3 steps for the remaining 3 setups.
- Click either *Next* or the *Sort By* tab.



- Move to the top most drop down and select a field in which to sort your report by. If you want the report to be sorted in descending order place a checkmark in the *Descending Order* checkbox. No checkmark, ascending is assumed.
- If you want you can repeat the above step for total of three fields to sort the report by.
- Click *Finish*.

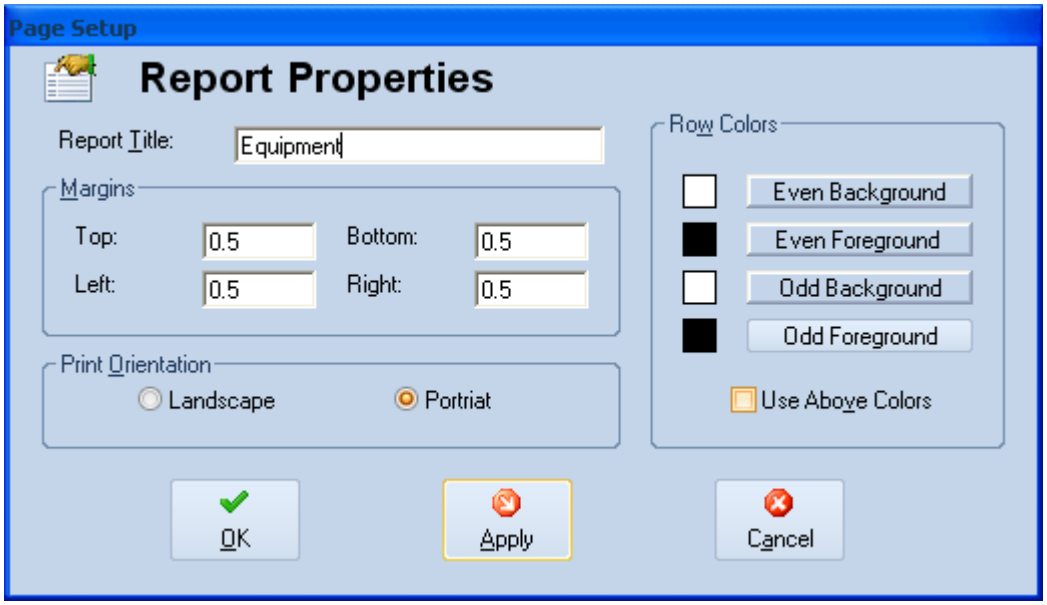
Joining Tables

In many times you may want to report on information from more than one table within the database. To do this you will need to join tables, and setup matching criteria to do this. The procedure for using two tables in your report will be outlined next.

- Start the creation of your report as outlined in the previous section.
- After selecting your database click the *Select Table* tab.
- The drop down list here will contain all tables found within the selected database. Move to this list and select the table you want to base your report on by clicking on it.
- Click and check the *Select and Join Second Table* checkbox
- Move to the second table drop down list, and select the second table.
- Move to the *Joining Tables – Fields Matching Criteria* and setup the criteria for joining these tables. These fields will normally have the same field name, and be of the same data types as shown in the example.
- Finish the report setup process as previously outlined.

Report Page Setup

You can setup the print orientation, page margins, and report color using the *Report Page Setup* option.



To use the report page setup:

- Click on the *Report Properties* icon in the *Settings* group of the ribbon.
- To change or edit the reports title, move to the *Report Title* text box and edit the information found there.
- To specify the page margins to use move the *Margins* area as type in your new values. The margins are setup in inch values, where .5 would be the same as ½ inch.
- To specify the orientation of the printed document, move to the *Print Orientation* section and select the option of your choice.
- To specify the background color for even rows within your report, move to and click on the *Even Background* button.
- Select the color of your choice from the color picker dialog and then click the *OK* button.
- Repeat the above two steps for the other colors.
- To actually use the specified colors, ensure there is a checkmark placed in the *Use Above Colors* checkbox.
- To apply your changes without closing the screen, click on the *Apply* button.
- To apply your change and exit this screen, click on the *OK* button.

Print Preview

To obtain a print preview of the current report:

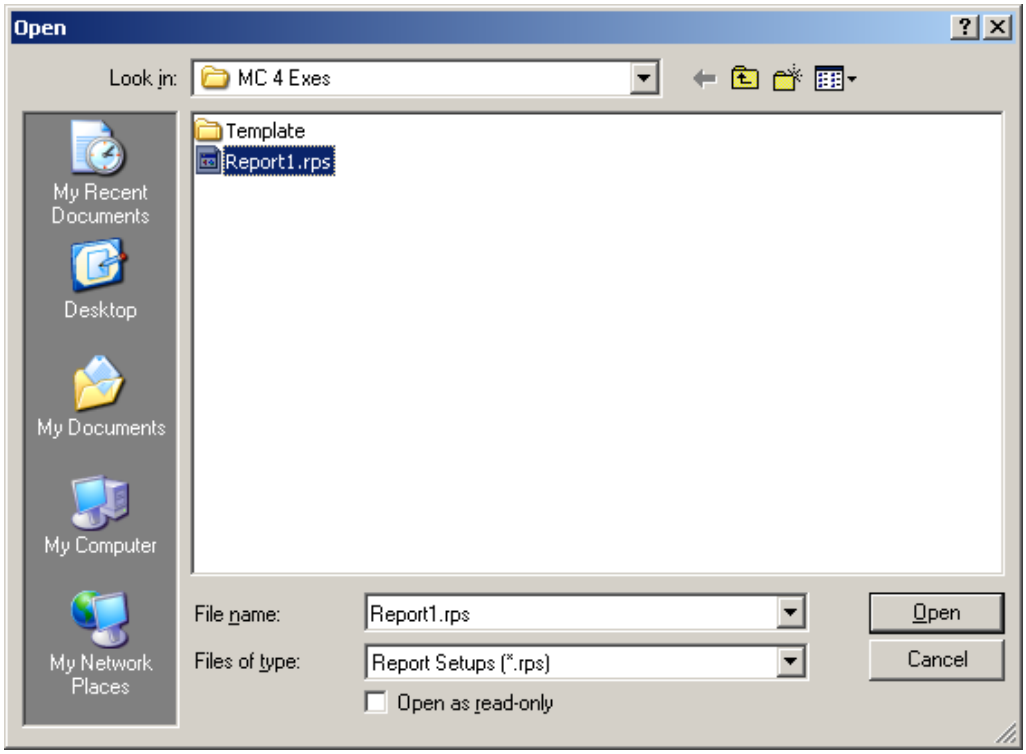
- Click on the *Module* button in the ribbon.
- Move over the *Print* option and then click on the *Print Preview* option.

Printing the Reports

To print the current report:

- Click on the *Module* button in the ribbon.
- Move over the *Print* option and then click on the *Print Record* option.
- When the *Print* dialog appears, click on the *Print* button.

Opening a Saved Report Setup



To open a saved setup:

- Click on the *Module* button in the ribbon.
- Move over the *Save* button and select the *Save Report Setup* option.
- Use the *File Open* dialog to locate the file, and select it. Click *Open*.
- Edit the report setup to your liking, clicking the *Finish* button when done.

Saving a Report Setup

You can save a report setup to file, thereby eliminating the need to recreate everything from scratch. Once re-opened, you will only need to change some of the report criteria to you new specifications.

To save a report:

- Click on the *Module* button in the ribbon.
- Move over the *Open* button and select the *Open Report Setup* option.
- Move to the directory you want to save your file to, type in the file name, and click *Save.*

Opening a Saved Report Document

To open a saved document:

- Click on the *Module* button in the ribbon.
- Move over the *Open* button and select the *Open Document* option.
- Use the *File Open* dialog to locate the file, and select it. Click *Open*.

Saving a Report Document

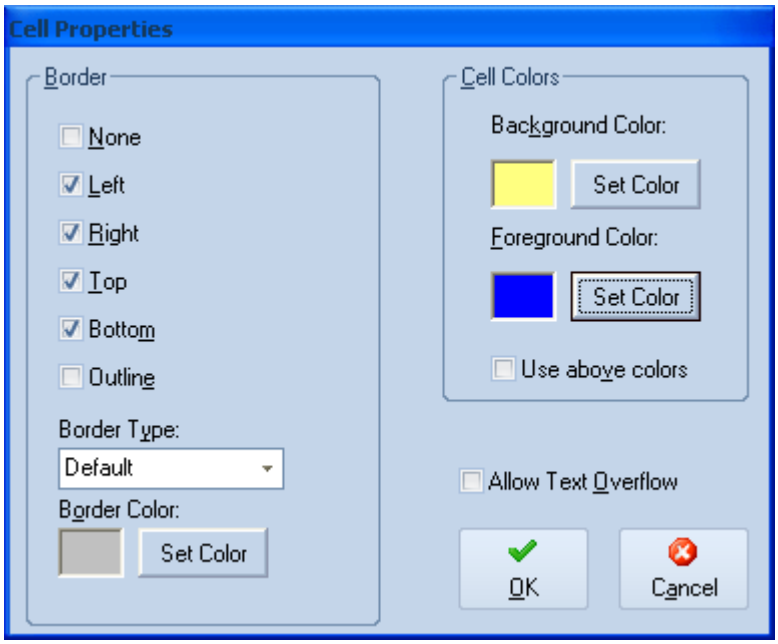
To save a report:

- Click on the *Module* button in the ribbon.
- Move over the *Save* button and select the *Save Document* option.
- Move to the *Save as File Type* list box and select how you want the file saved. Available options here are the default style or SS, Excel 5 style or XLS, HTM or Internet documents, or tab delimited text files or TXT.

- Move to the directory you want to save your file to, type in the file name, and click *Save.*

Changing a Cell's Properties

To change the properties of a cell or a group of cells:



- Select the cell or cells you want to work with.
- Click on the *Format Cells* option in the ribbon.
- Move to the *Border* section and setup the border you want to apply to the selected cell(s). The options are:
    - *None* – Removes any border properties currently assigned to the cell(s).
    - *Left* – Places a border to the left side of the selected cell(s).
    - *Right* - Places a border to the left right of the selected cell(s).
    - *Top* - Places a border to the top of the selected cell(s).
    - *Bottom* - Places a border to the bottom of the selected cell(s).
    - *Outline* – Places a border along the outside edge of all selected cells.
- Move to *Border Type* drop down box and select the type of *Border* you want to use by clicking on an option found there.

- To specify the color of the borders, move to and click on the *Set Color* button. Select the color of your choice by clicking on it, and then click the *Ok* button.
- Move to the *Cell Colors* section.
- To set the background color of the selected cells, move to the *Background* field and click the *Set Color* button.
- Select the color of your choice by clicking on it, and then click the *Ok* button.
- Repeat the above two steps for the foreground or font color.
- To allow the application to use these colors, place a checkmark in the *Use Above Colors* checkbox.
- To allow Text overflow into adjacent fields, place a checkmark in the *Allow Text Overflow* checkbox.
- Click the *Ok* button.

NOTE ABOUT TEXT OVERFLOW
When set, *text overflow* applies to the whole document, and not just to a single cell. If a cell is aligned as left aligned, text will overflow into the left adjacent cell or cells. If it's set as right aligned, text will overflow to the right. If a cell's text alignment is set as center aligned, text will overflow to adjacent cells in both directions.

Font Characteristics

To setup the Font characteristics:

- Select the cell or cells you want the formatting to effect.
- Move to the *Font* group in the ribbon and select the *Format Fonts* icon.
- Setup the *Font* to use and the other characteristics to your liking.
- Click the *Ok* button.

Renaming a Column Header

To rename a column header:

- Select any cell within the column you want to rename by clicking in it.
- Move to the *Font* group in the ribbon and select the *Rename Header* icon.
- Type in the new header information in the space provided, click the *Ok* button.

Aligning Text

To change the alignment of text with a cell or cells of your report:

- Select the cell or cells you want to work with.
- Move to the *Cell Formatting* group and select the option of your choice. Available options include: left, right and center align.

Creating a Chart from Report Data

You can create charts and graphs directly from report data, to use this feature:

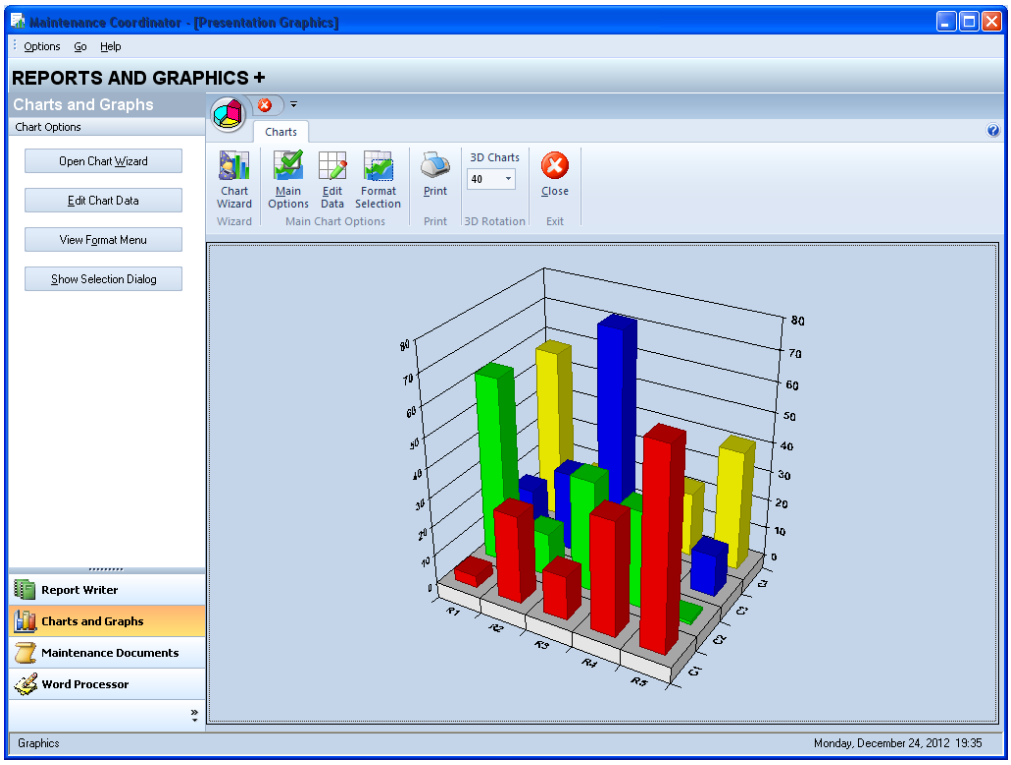
- Create your report as outlined previously in this chapter. Try to select you report fields so that one column will hold the labels for your chart, and the next adjacent field(s) contain report numeric data.

000031	
0709-1	$87.44
0709-10	$28.68
0709-2	$9.00
0709-5	$174.88
0709-9	$233.42
0801-14	

- Select the rows and columns that you want to create a chart on from within the report grid.
- Click on the *Create Chart* option in the ribbon.

Charts and Graphics

Another section of the reports module is the *Charts and Graphics* feature, and with this feature you can create some pretty outstanding charts and presentation styled graphics. This designer is also used by some of our reports, and for this reason we only discuss it once in the *Common Features* chapter. Please refer to this chapter for details on using this feature. Also explore the help file for even more insight on all the options available to the feature.



To access the chart and graphics designer:

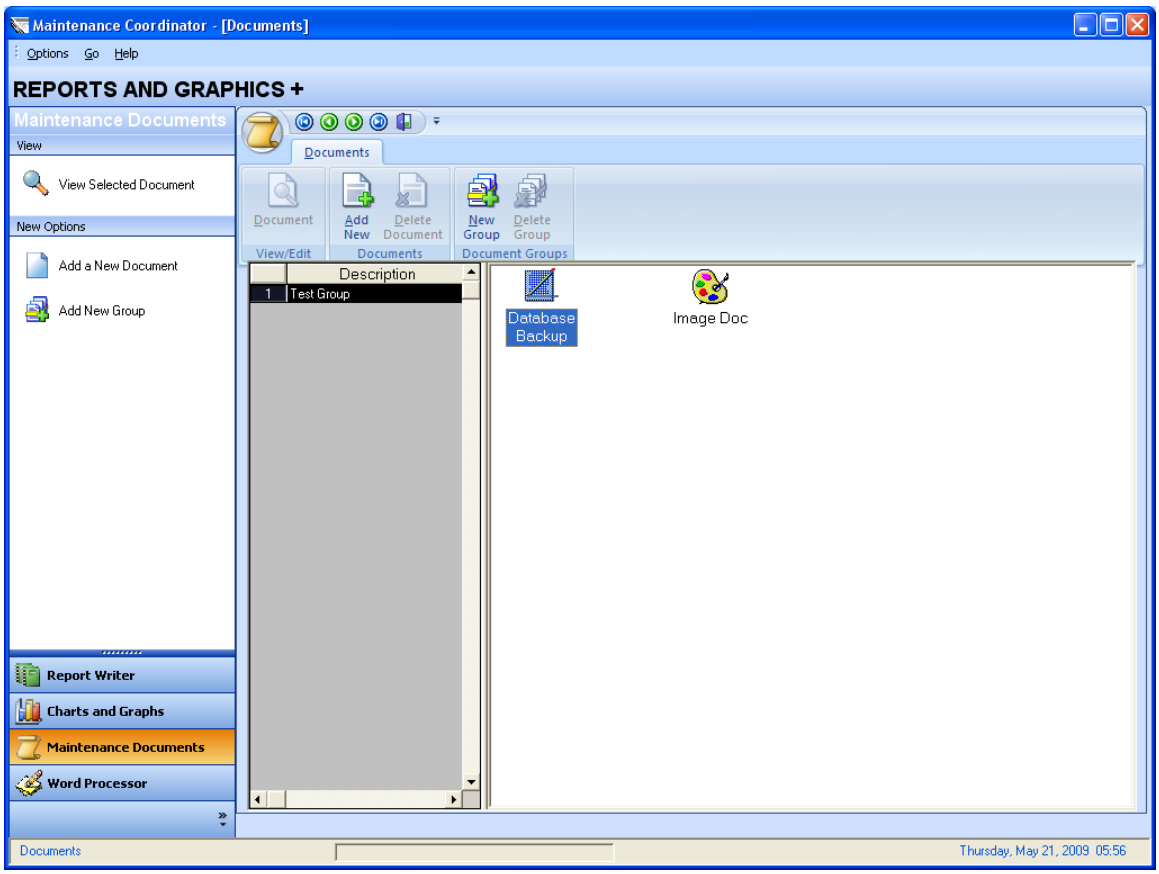
- Click on the *Graphics* option in the shortcut bar.

To access most features of this designer:

- Right mouse click on the element of the chart you want to work with. This can include the chart itself, or any of its elements.

Documents Feature

Yet another section of the Reports module is the Documents feature. Here we provide you with a means to record and maintain a countless number of different documents that are grouped by categories. These documents can either be word processor type documents, images, or links to external files.



This feature is used in various places throughout the Maintenance Coordinator system, and the one here is completely compatible with the same feature found in our PM Coordinator application. For more information on using this feature, please refer to the chapter titled: *Common Features.*

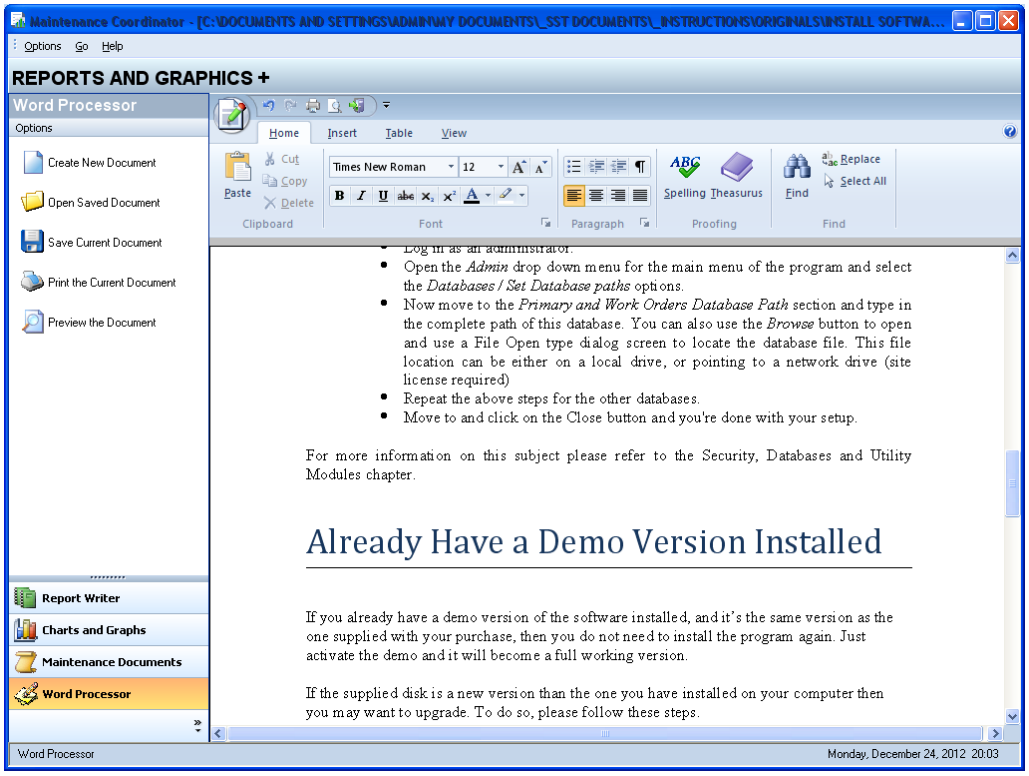
To access the *Documents* feature:

- Click on the *Documents* option in the shortcut bar.

Word Processor

We use the built in word processor all over the Maintenance Coordinator system and you should learn how to use it quite well. For this reason we have decided to allow you to use this powerful feature all by itself. Create and read documents with this feature rich text editor.

For more information on how to use this word processor please refer to the *Word Processor* chapter.



To access the word processor:

- Click on the *Word Processor* option in the shortcut bar.

MAINTENANCE COORDINATOR SYSTEM

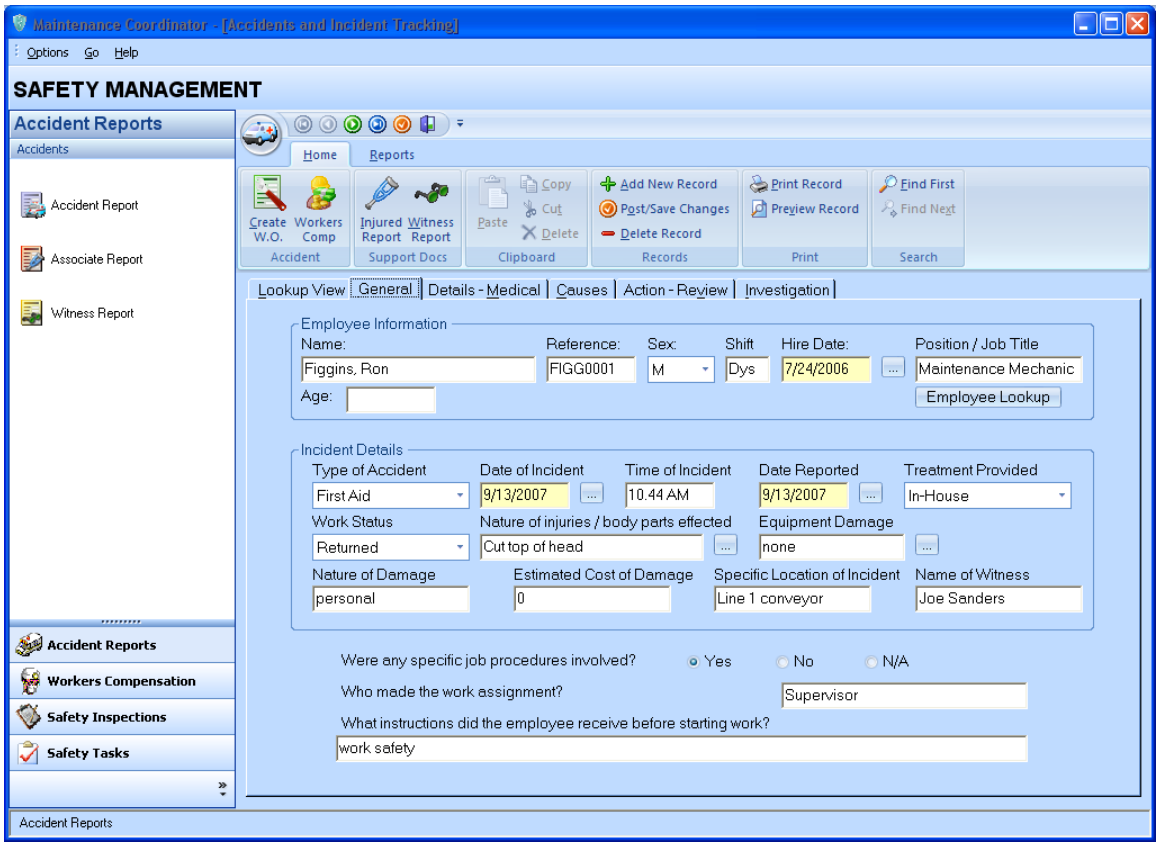
Safety Management

SIMPLICITY
Software Technologies Inc.

Table of Contents

Overview

We know that many times you'll find that the person responsible for maintenance is often responsible to over see safety performance as well. With the Safety Management module we give you the tools to track accidents, do complete investigations on incidents, and make analyzes of incidents to prevent further occurrences, and more.



This module also allows you to track workmen compensation claims and costs, create and track safety inspections and create a safety punch list. It's also an easy task to turn incidents or punch list items into work orders. These work orders can also be tracked from within this module. So if you need safety management in your workplace, this module should provide you with the resources to get the job done.

This module is basically made up of four different internal modules or sections. You have Accidents, Workers Compensation, Safety Inspections and a Punch list section. Our discussion on this module will be broken down into these sections.

Moving Around in the Module

This module is divided into sections. To move from one section to another:

- Open the *Go* menu and make your selection or click on a choice in the shortcut bar.

Accidents and Incidents

The Accident and Incidents section is where you can track incidents in your workplace, and analyze these incidents with the built in reports. By analyzing this information problem areas can be identified and corrective action can be taken. Accidents can cost a company a lot of money as employees miss work, payment of workers compensation costs, and property damage.

One area this section shines is in record keeping. You can keep detailed record on every incident within the database, and the documents can also be printed to provide for hard copy type records. The advantage of keeping the incidents in a database, as opposed to just hard copies, is that the information can be more readily analyzed and reported on

Accidents Lookup View

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

Resorting the Accidents Database

To resort the Accidents database:

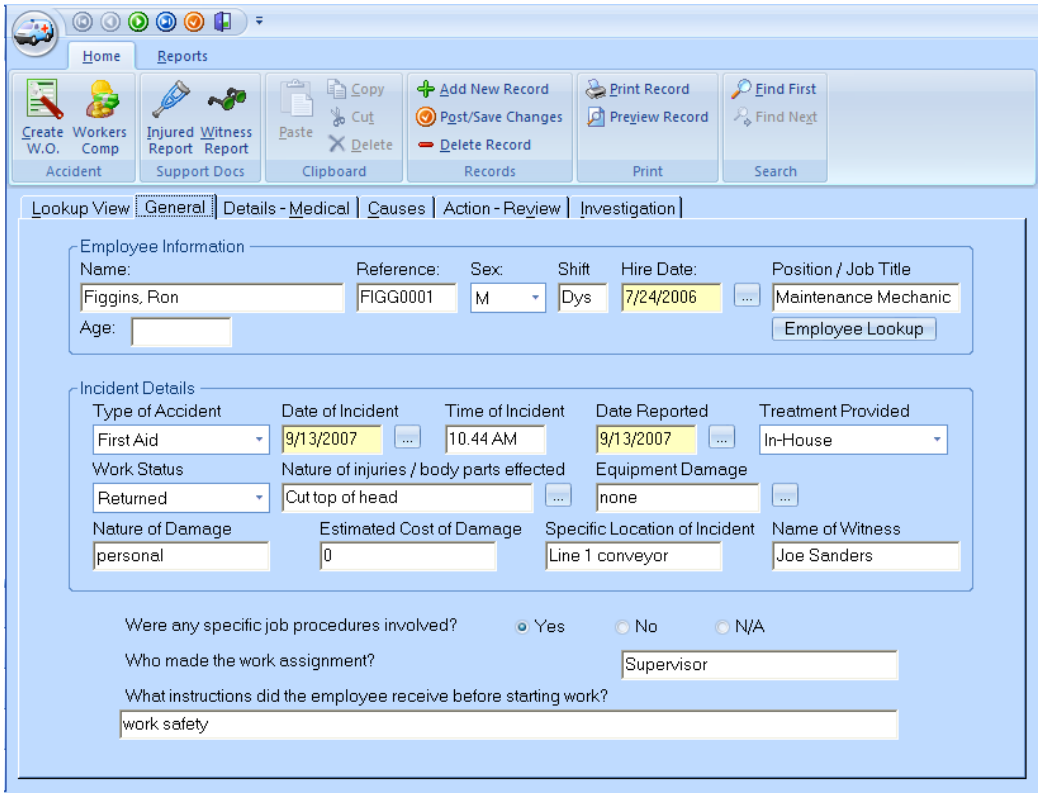
- Move to the *Accidents* section by accessing the *Go* menu and selecting the *Accident Reports* option.

- Move to the *Table 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.

Creating a New Incident / Accident Record

This is the main incident investigation report that would be filled out from interviews with the main parties involved, and any witnesses you may have. Depending on how your operation is setup, the information would be recorded by your safety team, or perhaps the immediate supervisor.

To create a new incident report:



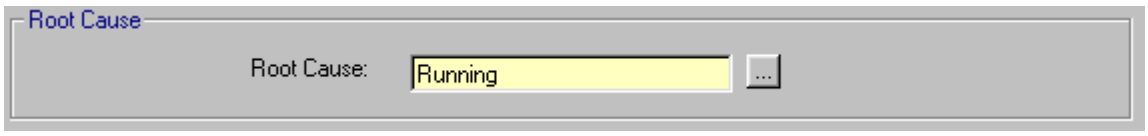
- Gather all the necessary information needed.
- Move to the *Accidents* section by accessing the *Go* menu and selecting the *Accident Reports* option.
- From the *Home* tab of the ribbon, click the *Add New Record* option.
- Move to and click on the *General* tab.
- Move to the various fields found on this screen and input the appropriate information.

- Repeat the above step for the *Details – Medical*, *Causes*, *Action – Review*, and *Investigation* tabs.
- Click on the *Post/Save Changes* icon in the ribbon to save your information.

Root Cause Field

The *Root Cause* field of the Incident document is somewhat different from the remainder of the fields. This field does not show up on any of the printed documents but is used exclusively for reporting. This field let's you group like incidents on reports, and you should try to reuse the same description as often as possible. Good descriptions for this field maybe ducking under, machine malfunctions, running, horseplay, and so on. Hopefully, you can see how this may come in handy for grouping like causes on reports.

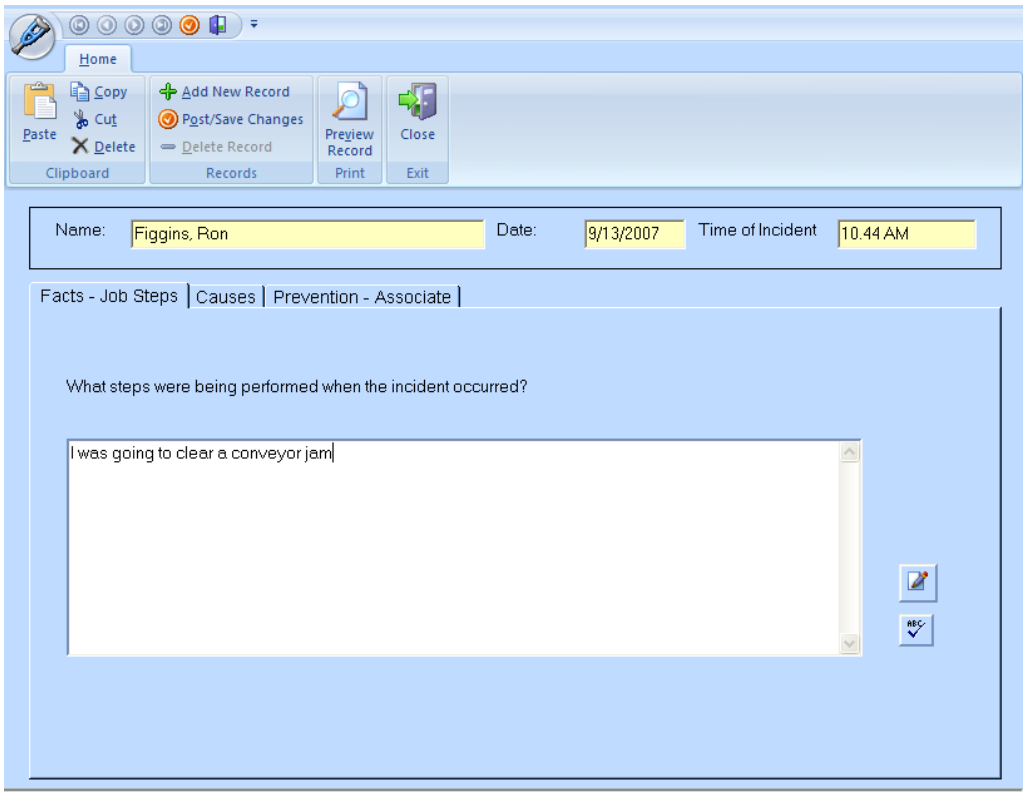
To set the root cause field:



- Create your incident reports as previous stated.
  - Move to the *Causes* tab by clicking on it.
  - Move to and click on the … button adjacent to the *Root Cause* field.
- Use the dialog as would use the *Quick Entry* dialog explained in the *Common Features* chapter.

Associate Report

This report is the facts of the incident as described by the employee or employees involved. You can create more than one Associate report per main incident.

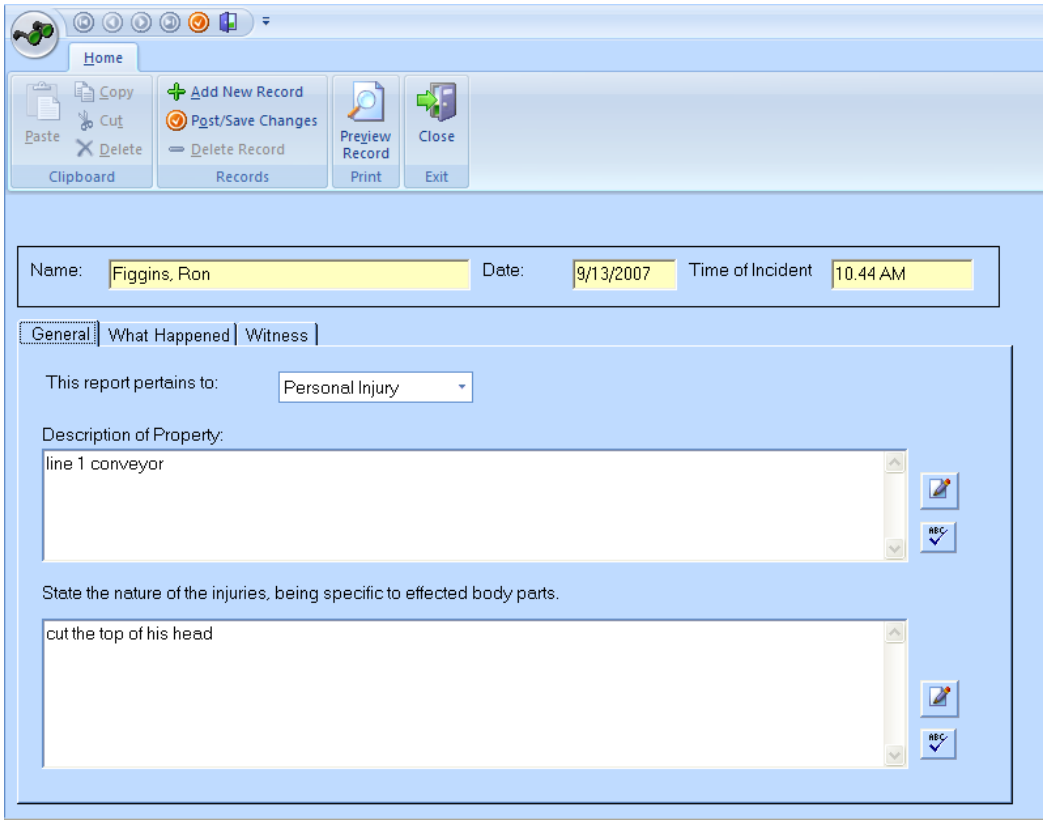


To create an Associate Report:

- First create and the select the Main Accident / Incident record this document will be associated with.
- Click on the *Injured Report* in the ribbon.
- Click on the *Add New Record* button in the ribbon.
- Move to and click on the *Facts – Job Steps* tab.
- Move to the various fields found on this screen and input the appropriate information.
- Repeat the above step for the *Causes*, and *Prevention – Associate* tabs.
- The information entered will be saved for you automatically.

Witness Report

Any witness you have to an incident or accident should fill out this report. You can create as many witness reports as you would like



To create a Witness Report:

- First create and the select the Main Accident / Incident record this report will be associated with.
- Select the *Witness Report* option in the ribbon.
- Click on the *Add New Record* button.
- Move to and click on the *General* tab.
- Move to the various fields found on this screen and input the appropriate information.
- Repeat the above step for the *What Happened*, and *Witness* tabs.
- The information entered will be saved for you automatically.

Delete an Accident Record

To delete an Accident Record, including all Associate (Injured) and Witness reports attached to that incident:

- Locate and select the Accident / Incident report that you want to delete.
- Click on the *Delete Record* option in the ribbon.

Delete an Associate Report

To delete an Associate report record:

- Locate and select the Accident / Incident report that's associated with the report you want to delete.
- Select the *Injured Report* option in the ribbon.
- Use the data control and display the report you want to delete.
- Click on the *Delete Record* button in the ribbon.

Delete a Witness Report

To delete a Witness report record:

- Locate and select the Accident / Incident report that's associated with the report you want to delete.
- Select the *Witness Report* option in the ribbon.
- Use the data control and display the report you want to delete.
- Click on the *Delete Record* button in the ribbon.

Printing an Investigation Report

To print one of the investigation reports:

- Locate and select the document that you want to print.
- Click on the *Print Record* option in the ribbon.

Printing Blank Investigation Forms

To assist you in gathering information on incidents, we have included blank investigation forms that can be printed. Once printed, these forms can be filled out and then later transferred to the database.

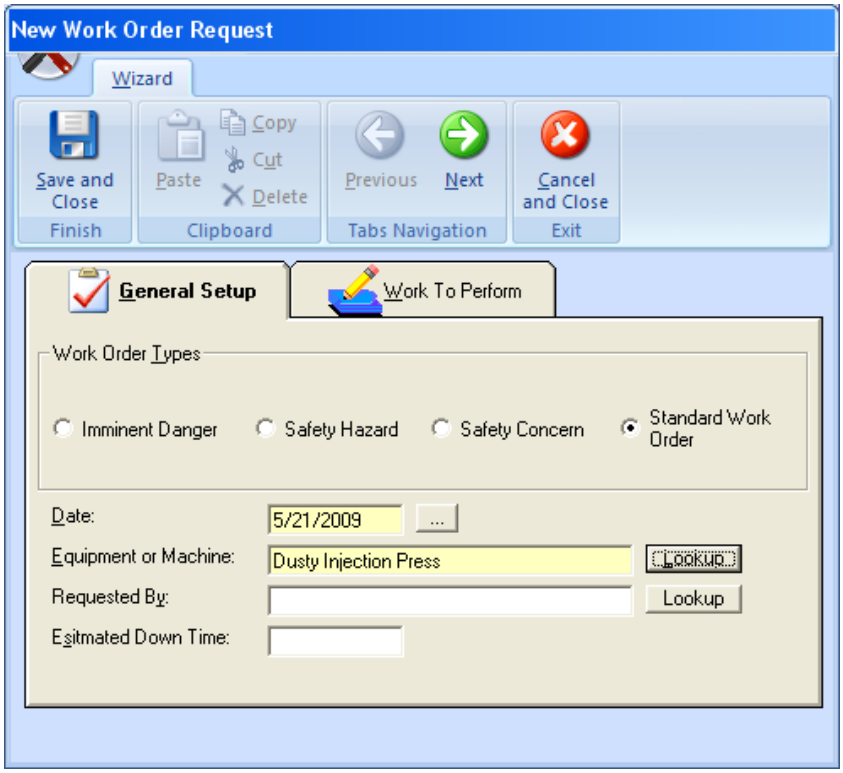
To print a blank investigation form:

- Click on the *Reports* tab in the ribbon and move to the *Blank Investigation Forms* section.
- Select the investigation form of your choice.

Creating a Work Order from an Incident

Many accidents and incidents result in some form of corrective action to be done to prevent further incidents. For this very reason we have provided the means to create a work order from an incident. The resulting work order will be available in the work orders module, awaiting assignment and completion.

To create an Incident work orders:

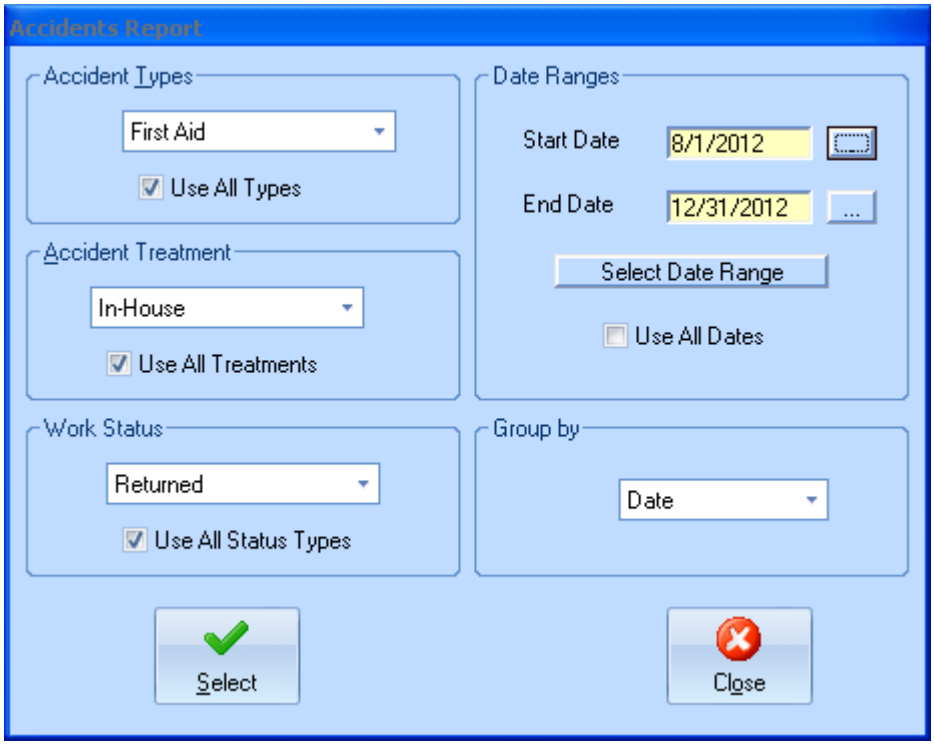


- Locate and select the incident that you want to create a work order for from within the *Accidents* section.
- Click on the *Create W.O.* option in the ribbon.
- When asked if you want to create a work order, click *Yes*.
- Move to the *Work Order Types* area and click on the option here that best describes the type of work order you're creating.
- Move to and click on the … button adjacent to the *Equipment or Machine* field. Select the name of the equipment you want to assign to this work order from within the grid.
- Click the *Select* button.
- Move to the other fields and enter the appropriate information.
- When you're done with this tab, click the *Next* button to move to the next.
- Edit the fields on the *Work to Perform* tab to your liking.
- Click the *Save and Close* button in the ribbon.

Accident Report Wizard

With the Accident Report Wizard you can start analyzing your incident information to help understand it better. With the knowledge you gain, you can begin your prevention strategies.

To create a report using the Accident Report Wizard:

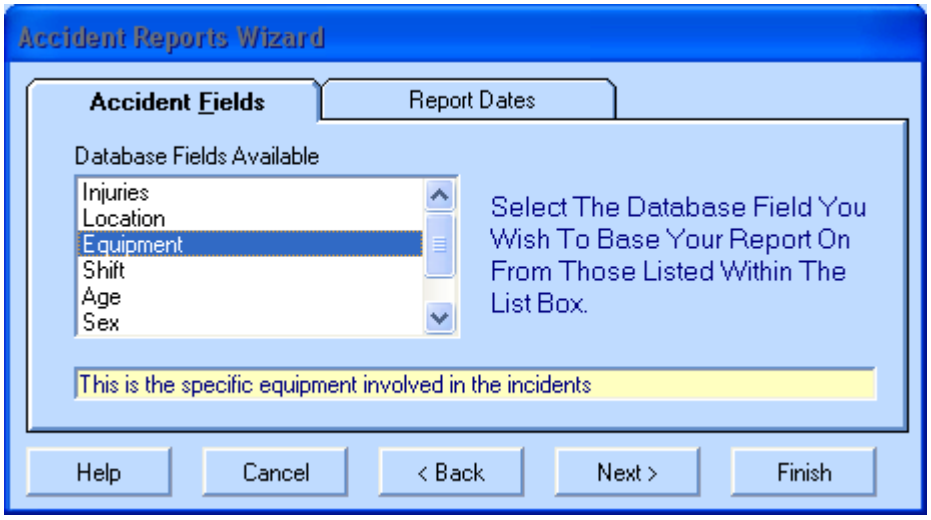


- From the *Accidents* section, click the *Reports* tab and select the *Report Wizard* option.
- Move to the *Accident Types* drop down and select the type of incident you want to base your report on. To use all types, place a checkmark in the *Use All Types* checkbox.
- Repeat the above step for the *Accident Treatment* and *Work Status* sections.
- Move to *Date Range* section and click on the … buttons adjacent to the *Start Date* and *End Date* fields and select the appropriate dates from the pop up calendar.
- To use all dates, place a checkmark in the *Use All Dates* check box.
- Move to the *Group By* drop down, and select how you want to group your report.
- Click the *Select* button.
- When the chart loads, you can format this chart to your liking. Please refer to the *Chart Designer* chapter for more information.
- Click the *Close* button.

Accident Report by Fields

This report allows you to breakdown incidents by individual fields. This helps you gain much insight to what's happening in your work place.

To create an Accident Report by Fields report:



- From the *Accidents* section, click the *Reports* tab and select the *Accident Field* option.

- Move to the *Database Fields Available* and select the field you want to base your report on.
- Click the next button.
- Move to and click on the … buttons adjacent to the *Start Date* and *End Date* fields and select the appropriate dates from the pop up calendar.
- Click the *Finish* button.
- When the chart loads, you can format this chart to your liking. Please refer to the *Chart Designer* chapter for more information.
- Click the *Close* button.

Creating a Workers Compensation Claim

With the Safety Module you can keep a summary of Workers Compensation Claims as they relate to your Accident Reports, in fact each accident record can have a Workers Compensation Summary attached to it.

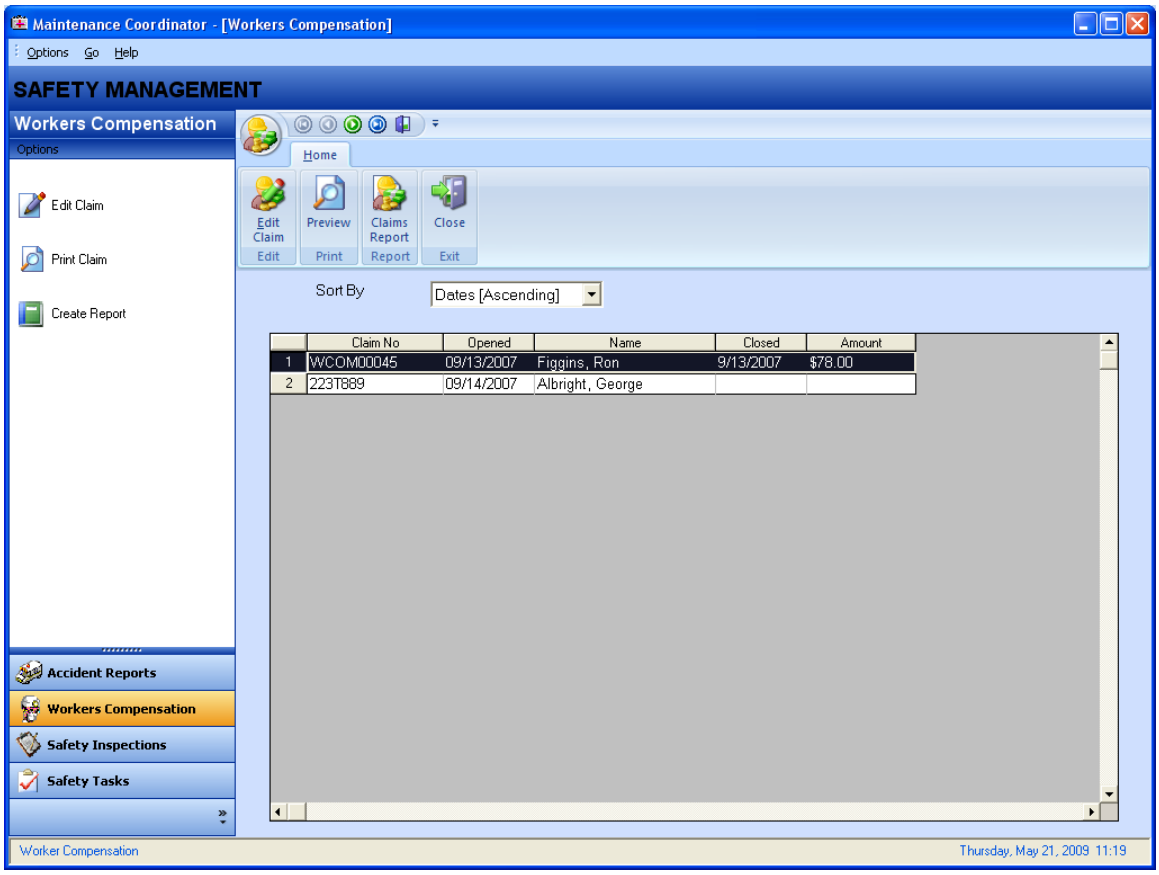
To create a Workers compensation claim:

- Locate and select the incident that you want to create a claim on, from within the *Accidents* section.
- Select the *Workers Compensation* option in the ribbon.
- When asked if you want to create a claim, click *Yes*.

More information on the *Workers Compensation* form will be explained in the *Workers Compensation* section of this chapter.

Workers Compensation Section

The Workers Compensation section allows for the quick lookup, and editing of workers compensations claims and documents. Claims are created from Accidents and Incidents.



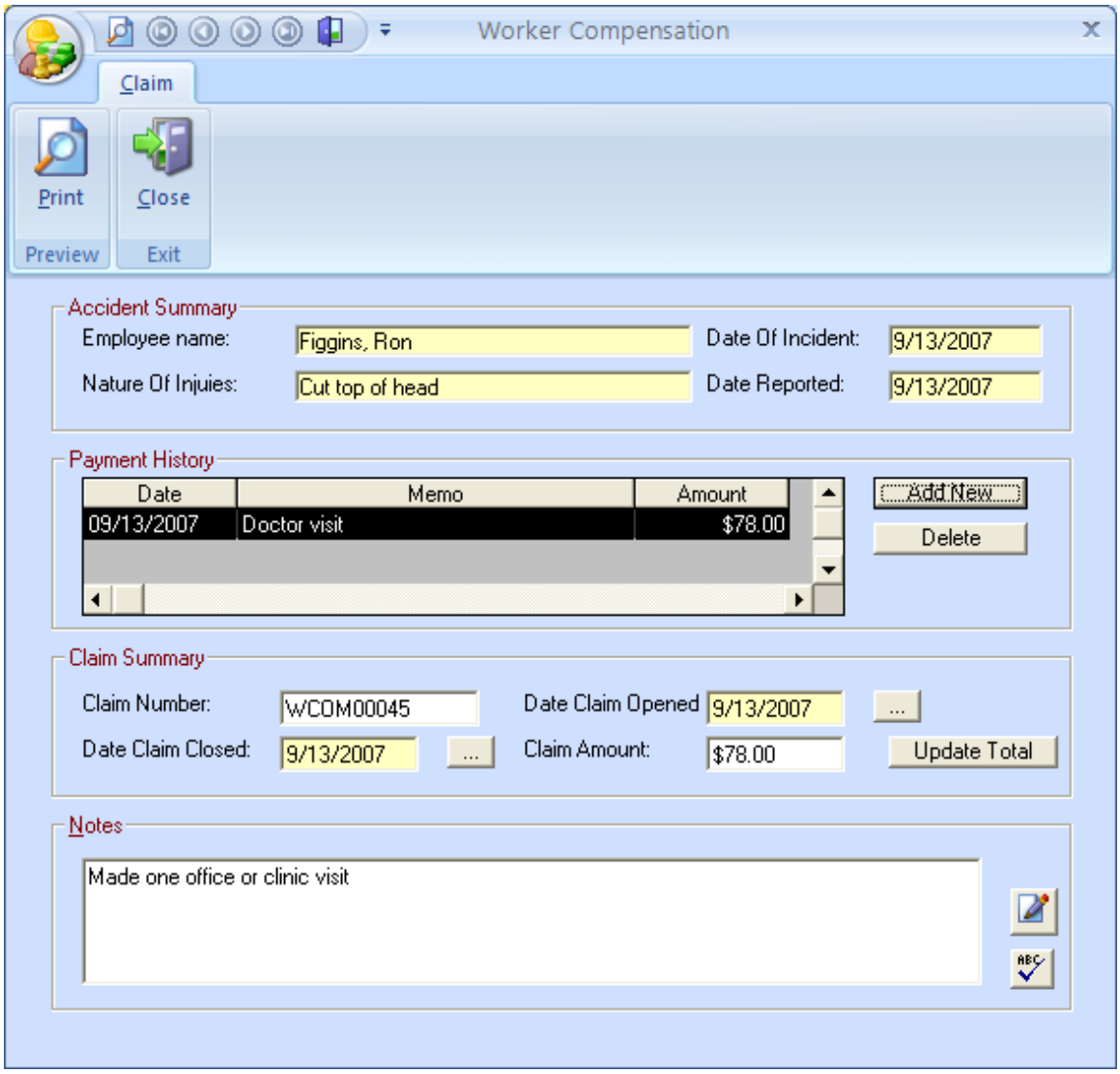
Resorting the Workers Compensation Database

To resort the database:

- Move to the *Workers Compensation* section by clicking on the *Workers Compensation* option in the shortcut bar.
- Select a sort option from the *Sort By* drop down list. The database will be sorted by whatever option you have selected from this list.

Using the Workers Compensation Form / Editor

With the Safety Module you can keep a summary of Workers Compensation Claims as they relate to your Accident Reports, in fact each accident record can have a Workers Compensation Summary attached to it.



The top section of the Workers Compensation dialog screen contains summary information from the accident report. The second section allows you to keep a complete history of your payments.

The third section contains Claim Summary information such as the Claim number, Date claim closed, and the dollar amount associated with the claim.

The lower section is a notes section for this claim. This note section can contain any information that you feel relates to this specific claim. You can put around three pages of text in this notes section, or 32,000 characters.

To add or view information on the Workers Compensation for an incident:

- Display the related accident / incident report within the Accident section.
- Select the *Workers Comp* option in the ribbon.
- Move to the various text fields and add or edit the information as you see fit.
- Click on the *Close* button to exit this screen when ready, any changes you have made will be automatically saved.

To add information into the Payment History section:

- Move to and click the *Add New* button.
- Click in the various fields of the grid and type in your information.

To remove information from within the Payment History section:

- Move and click within the row that contains the information you wish to remove.
- Move to and click on the *Delete* button.

NOTE: You can edit the contents of the payment history at any time by double clicking within a grid cell, and typing or editing its contents.

To print the claim:

- Move to and click on the *Print* option in the ribbon.

To Edit a Workers Compensation Claim

- Move to and click on the *Workers Compensation* button in the shortcut bar.
- Select the claim you want to edit from within the grid.
- Click the *Edit Claim* button in the ribbon.
- Refer to the *Using the Workers Compensation Form / Editor.*

To Print a Workers Compensation Claim

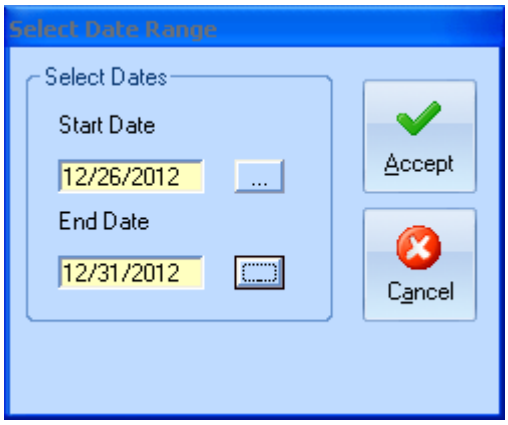
- Move to and click on the *Workers Compensation* button in the shortcut bar.
- Select the claim you want to print from within the grid.
- Click the *Preview* button in the ribbon.

To Delete a Workers Compensation Claim

- Move to and click on the *Workers Compensation* button in the main toolbar.
- Select the claim you want to delete from within the grid.
- Click on the *Module* button and select the *Delete Claim* option.

Workers Compensation Report

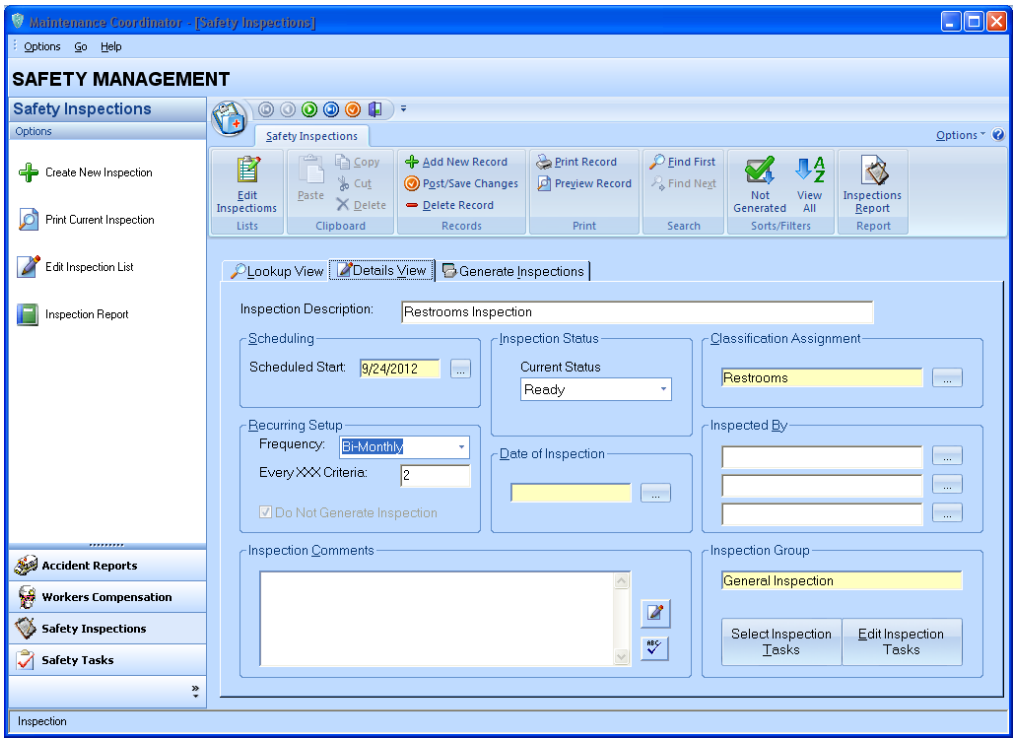
To create a Workers Compensation Report.



- Move to and click on the *Workers Compensation* button in the shortcut bar.
- Click on the *Claims Report* option in the ribbon.
- Move to and click on the … buttons adjacent to the *Start Date* and *End Date* fields and select the appropriate dates from the pop up calendar.
- Click the *Accept* button.

Safety Inspections

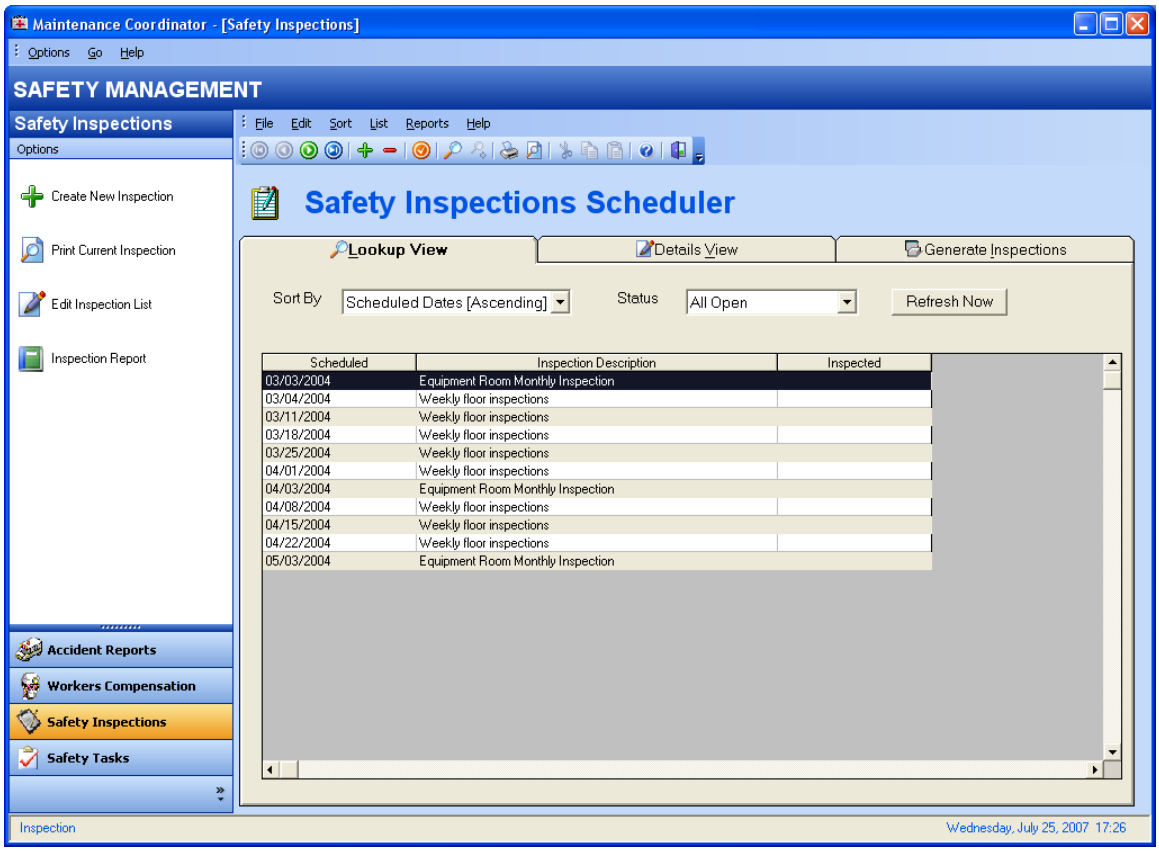
As you know regular safety inspections are essential in keeping your plant safe, clean, and in compliance with various regulations. With the safety inspections feature it's an easy task to create and administer regular safety inspections. This feature incorporates its own scheduler, in which to automatically generate future inspections.



Inspections Lookup View

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

Resorting the Inspections Database



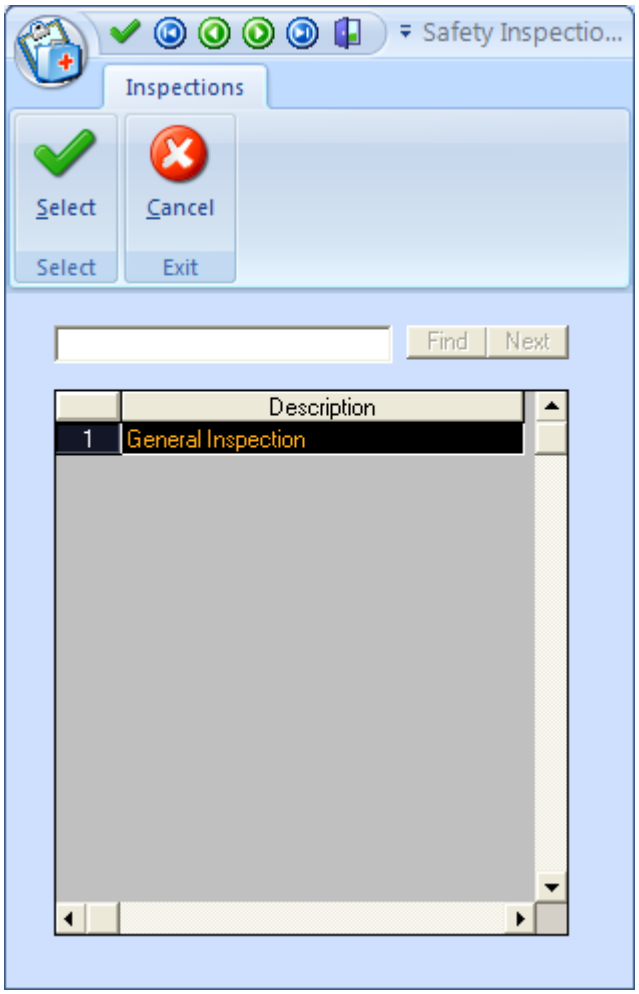
To resort the Inspections database:

- Move to the *Inspections* section by clicking on the *Inspections* option in the shortcut bar.
- Move to the *Lookup View* tab.
- Select a sort option from the *Sort By* drop down list.
- Repeat the above step for the *Status* drop down.
- Click the *Refresh Now* button.

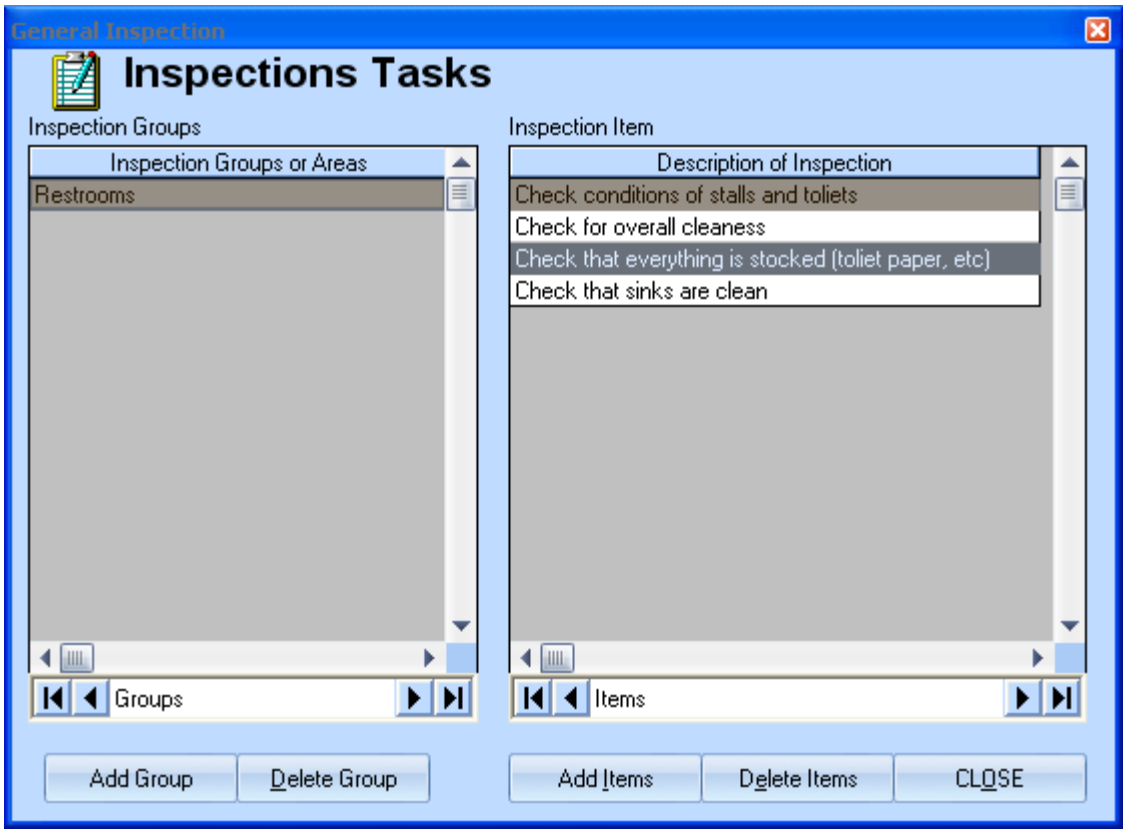
Creating Inspections Checklists

Before you can create inspection documents, you need to create the actual inspection checklists. These are the lists that the inspectors will be working from, and allow these lists to be arranged in groups.

To create an Inspection checklist:



- Move to the *Inspections* section by clicking on the *Inspections* option in the shortcut bar.
- Click on the *Edit Inspection* option in the ribbon's *Lists* group.
- Click on the *Module* button and select the *Add New* option.
- Type in a title for your new inspection in the space provided. Click *OK*.
- Click on the inspection title you just created from within the grid.
- Click *Select*.



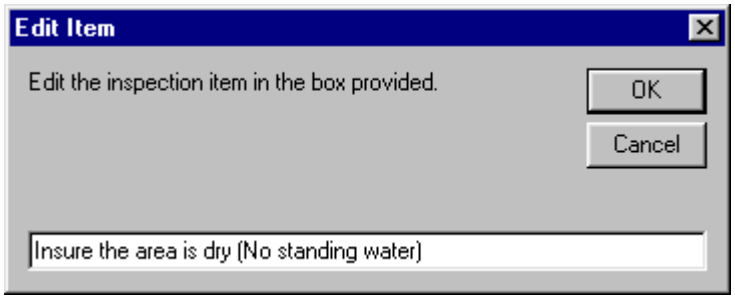
- Move to and click on *Add Group*. Types in a group name in the space provided and then click the *OK* button. This group title could be an area that needs inspection. Examples here could be electrical room, break room, main production area, and so on.
- Repeat the above step for all the groups you want to setup.
- Now you need to include inspection items for each of your groups. Select the group you want to add inspection items to.
- Click the *Add Item* button.
- Types in the inspection item or task in the space provided and then click *OK*. Example here could be, check for missing guards and covers, check for trip hazards, check for open electrical cabinets, and so on.
- Repeat the above step for all items you want to add to a group, and then repeat it for all the groups you want to set up.
- Click the *Close* button when done.

Editing Inspection Checklists

To edit an inspection checklist, adding or removing items:

- Move to the *Inspections* section by clicking on the *Inspections* option in the shortcut bar.
- Click on the *Edit Inspection* option in the ribbon's *Lists* group.
- Click on the inspection title you want to edit from within the grid.
- Click *Select.*
- Edit the list in the same fashion it was created.

To edit the title of an inspection group or item:



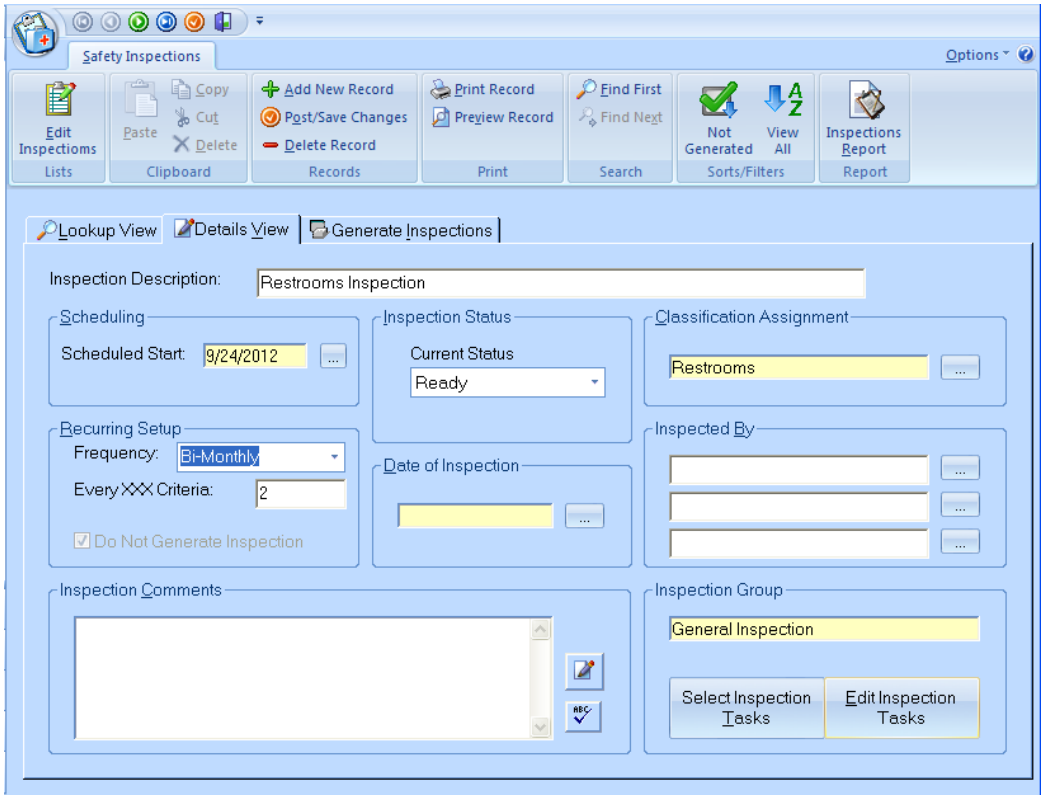
- Double click on the item you wish to edit.
- Modify or type in the new description in the space provided, and click *OK*.

Deleting items:

- Select the item you want to delete
- Move to and click on the appropriate *Delete* button for the group or item you want to remove.

Creating New Inspections

To create a new inspection:



- Move to the *Inspections* section by opening the *Go* menu and selecting the *Safety Inspections* option.
- Click on the *Add New* Record option in the ribbon.
- Click on the *Details View* tab.
- Move to the *Inspection Description* field and type in a description for this inspection.
- Move to the *Recurring Setup* area and select how often you want the inspection to repeat itself by selecting an option from the *Frequency* drop down list.
- Move to the *Every XX Criteria* text box and type if the number that represents the interval to repeat this inspection. This works with frequencies that have the XX criteria in their descriptions.
- Move to the *Inspection Status* section and select the status you would like to assign to this inspection.
- Move to the *Classification Assignment* section and click on the … button adjacent to this field.
- Select a classification form within the list, and then click on the *Select* button.

- Move to and click on the *Select Inspection Tasks* button.
- Select the inspection instructions you want to assign to this inspection from those listed in the grid.
- Click on the *Select* command button.
- Click on the *Post/Save Changes* option in the ribbon to ensure the inspection is saved.

Completing an Inspection

Once an inspection has been completed, information about that inspection should be recorded into the database.

To record inspection completion information:

- Move to the *Inspections* section by opening the *Go* menu and selecting the *Safety Inspections* option.
- Locate the inspection record you want to record information.
- Click on the *Details View* tab.
- Move to the *Inspection Status* area and update the current status by making a choice from the *Current Status* drop down.
- Move to the *Date of Inspection* area and click on the … button. Select the date of the inspection from the calendar, and click the *Select* button.
- Move to the *Inspected By* area, and record the names of the people that conducted the inspection.
- Move to the *Inspection Comments* section and record any information about the inspection that you would like to save. Such as any action items that may need correction.

Delete Inspection

To delete an inspection record:

- Move to the *Inspections* section by opening the *Go* menu and selecting the *Safety Inspections* option.
- Locate and select the inspection record you want to delete.
- Choose the *Delete Record* option in the ribbon.

Do Not Generate Inspection

The *Do Not Generate Inspection* flag prevents the program from generating new inspections. The program itself places a checkmark right after a new inspection has been created. This is done to prevent the program from repeatedly generating the same inspection over and over again.

To toggle the *Do Not Generate Inspection* flag:

- Click on the *Module* button and select the *Change Do Not Generate Value* option.

Sort Options

Besides from the sort options available on the Table View tab, you have other sort options found under the *Sort* menu. These become useful when you want to see all the inspections in the database, or want to see all the inspections that are set to regenerate themselves.

To use one of the above sort options:

- Move to the *Sorts/Filters* group in the ribbon and select the sort option of your choice.

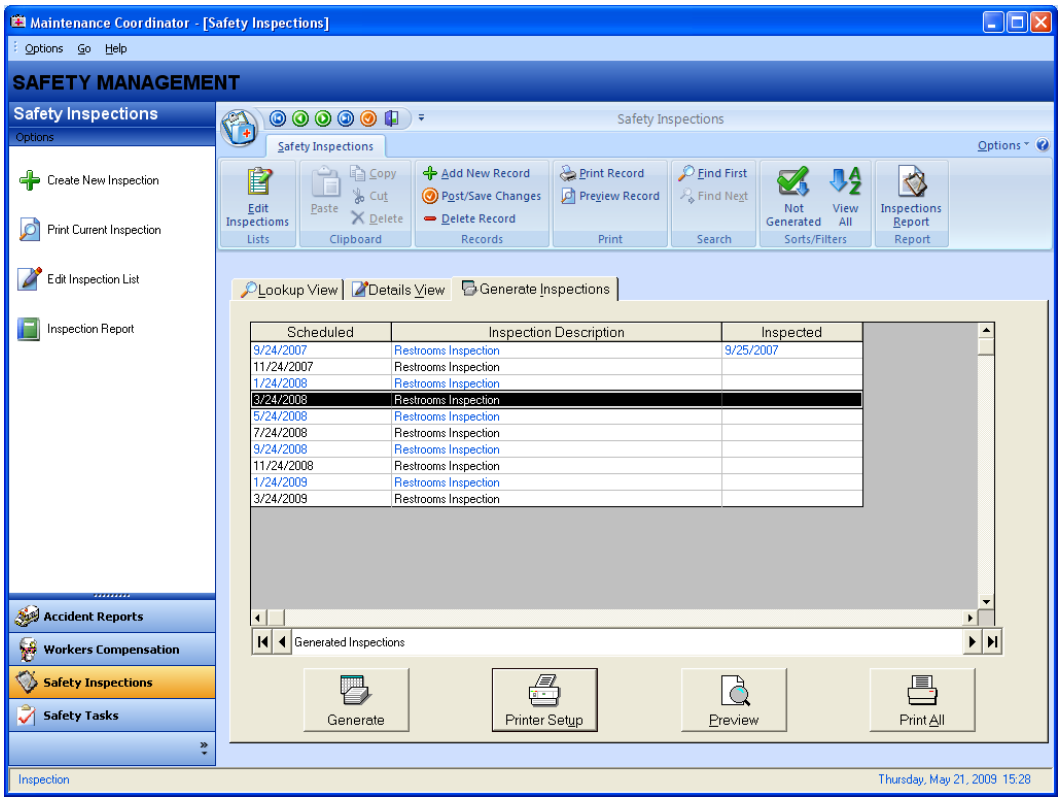
Printing and Generating Inspections

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

To generate a range of inspections to be printed, please follow these steps:
.

- Click on the *Generate Inspections* tab.
- Click on the *Generate* button.
- 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 and the program will generate all inspections that fall within the date range you have just setup.



- Now you have a couple of options in the printing of inspections. To print all the inspections generated just move to and click on the *Print All* command button.
- To print selected inspections from the list, click on the inspections you wish to print to select it, and then click the *Preview* command button.
- From the *Preview* screen, click the *Print* command button to print the document.

Create a New Archive Database

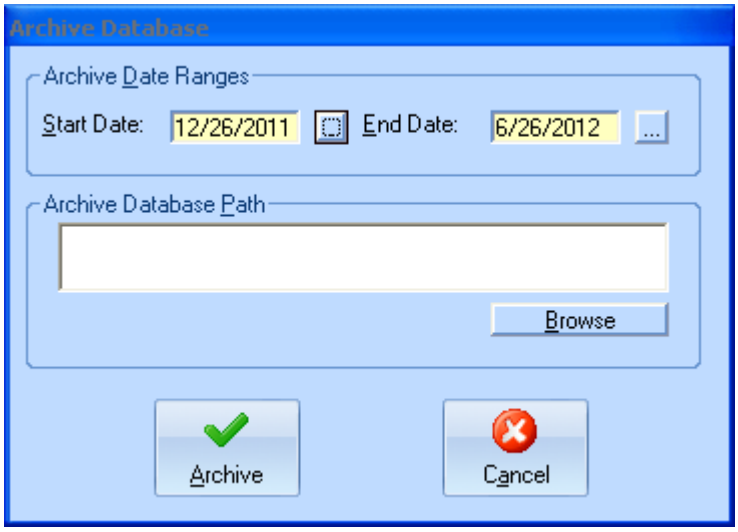
As you continue to use this application, your database is sure to grow in size. As a database grows too large there can be performance issues such as speed issues, and problems with the data itself. For these reasons it is highly recommended that you remove data from the database in regular intervals. Either deleting older records or archiving them to an external database can do this for you. In order to archive your records, you'll first need to create an archive database.

To create an archive database:

- Click on the *Module* button and move over the *Databases* option. Select *Create Archive Database*.
- Use this *Save As* type dialog as would any found in Windows, specifying the name and save path of this new database.
- Click the *Save* command button.

Archiving your Database

To archive your database:



- Click on the *Module* button and move over the *Databases* option. Select *Archive Database*.
- Move to the *Date Range* section and click on the … command button adjacent to the *Start Date* field.

- Select the start date for your archive from within this calendar. Click on the *Select Date* button.
- Repeat the above step for the *End Date* field. All inspections that fall between these two date ranges will be selected for archiving.
- Move to the *Archive Database path* section and click the *Browse* button.
- Locate and select your archive database using this file open type dialog. Click *Open.*
- Click the *Archive* button to remove the files from your main database, and place them into the Archive database.

IMPORTANT NOTE: Archiving files free up valuable database space, but this space will not be fully realized until you also perform a compact on the database. Performing a compact will free up this valuable database space. Please refer to the Database chapter for more details.

Restore Records from Archive

With the Database Restore feature you have two different restore options. You can restore every record found in the archive database, or restore a date range of records.

To restore all records from archive:

- Click on the *Module* button and move over the *Databases* option. Select *Restore Database*.
- Move to the *Restore Options* section and click on the *Restore All* radio button.
- Move to the *Archive Database path* section and click the *Browse* button.
- Locate and select your archive database using this file open type dialog. Click *Open.*
- Click *Restore*.

To restore a date range of records from archive:

- Click on the *Module* button and move over the *Databases* option. Select *Restore Database*.
- Move to the *Restore Options* section and click on the *Restore Dates* radio button.
- Move to the *Restore Date Ranges* section and click on the … command button adjacent to the *Start Date* field.

- Select the start date range for your restore from the calendar and click on the *Select Date* button.
- Repeat the above 2 steps for the *End Date* field to setup the ending date of the restore range.
- Move to the *Archive Database path* section and click the *Browse* button.
- Locate and select your archive database using this file open type dialog. Click *Open.*
- Click *Restore*.

Deleting a Date Range of Inspections

To permanently remove a date range of inspections from the database:

- Click on the *Module* button and move over the *Databases* option. Select *Delete Date Range*.
- Select the ending date for this completion from the calendar, and click the *Select Date* button. All inspections that fall on or before this date will be permanently removed from the database.
- Next you'll be notified of how many records will be deleted, and given your last chance to back out. To continue with the deletion, click the *Yes* button. If you have changed your mind, click any of the other two buttons.

Inspections Report

The Inspections report will provide you with a printed document on all your safety inspections.

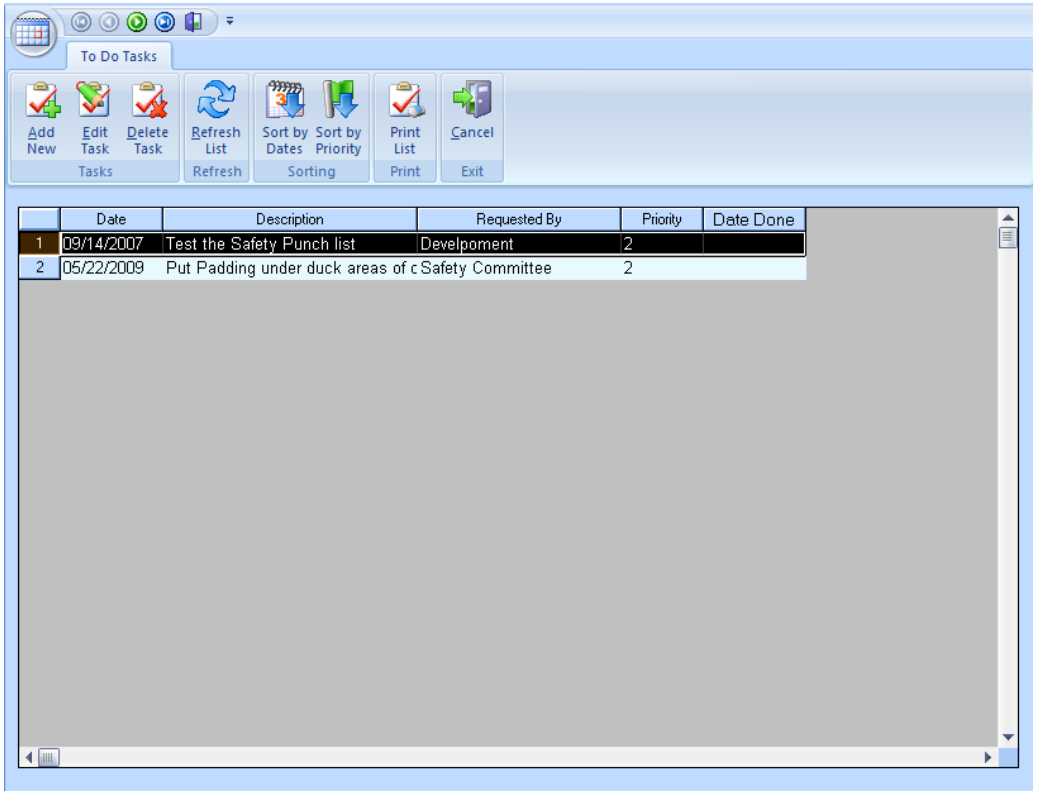
To create a Safety Inspection report:

- Select the *Inspection Report* option in the ribbon.
- Move to the *Status* section and select the status criteria to base your report on. To ignore the status, and report on all inspections, place a checkmark in the *Use All* checkbox found in this section.
- Move to the *Classifications* section and click on the … button found here. Select the classification assignment you want to base your report on from those listed and click on the *Select* button.
- To ignore classification assignments, place a checkmark in the *Use All* checkbox found in the *Classifications* area.

- Move to the *Date Range* area and click on the … buttons adjacent to the *Start Date* and *End Date* fields. Select the report dates from the pop up calendar, and click the *Select Date* button.
- To use all dates, place a checkmark in the *Use All Dates* checkbox.
- Click on the *OK* button to create the report.

Safety Tasks - Punch List

Any good safety program is sure to generate a list of things that need attention. These can come from the results of safety inspections, suggestions, and accidents. The punch list allows you to keep track on these items and actually create work orders form this list.



Accessing the Safety Tasks List

To access the Punch List:

- Click on the *Safety Tasks* button in the shortcut bar or open the *Go* menu and select the *Punch List* option.

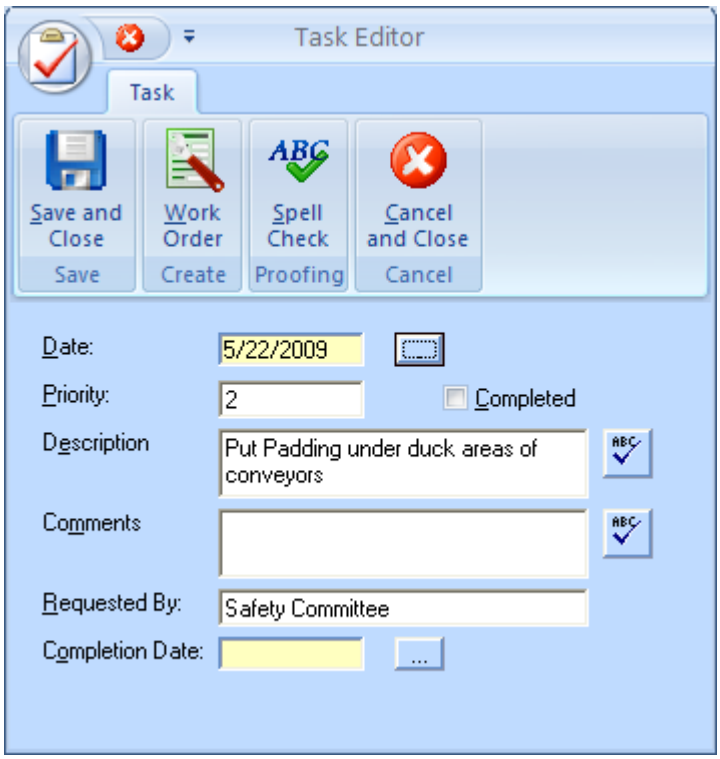
Adding a Task to the Punch List

To add a task:

- Move to and click on the *Add New* button in the ribbon. This will insert a blank task into the database, and at the same time pull up the task editor.

Editing a Task

To edit a task, once it's been created:

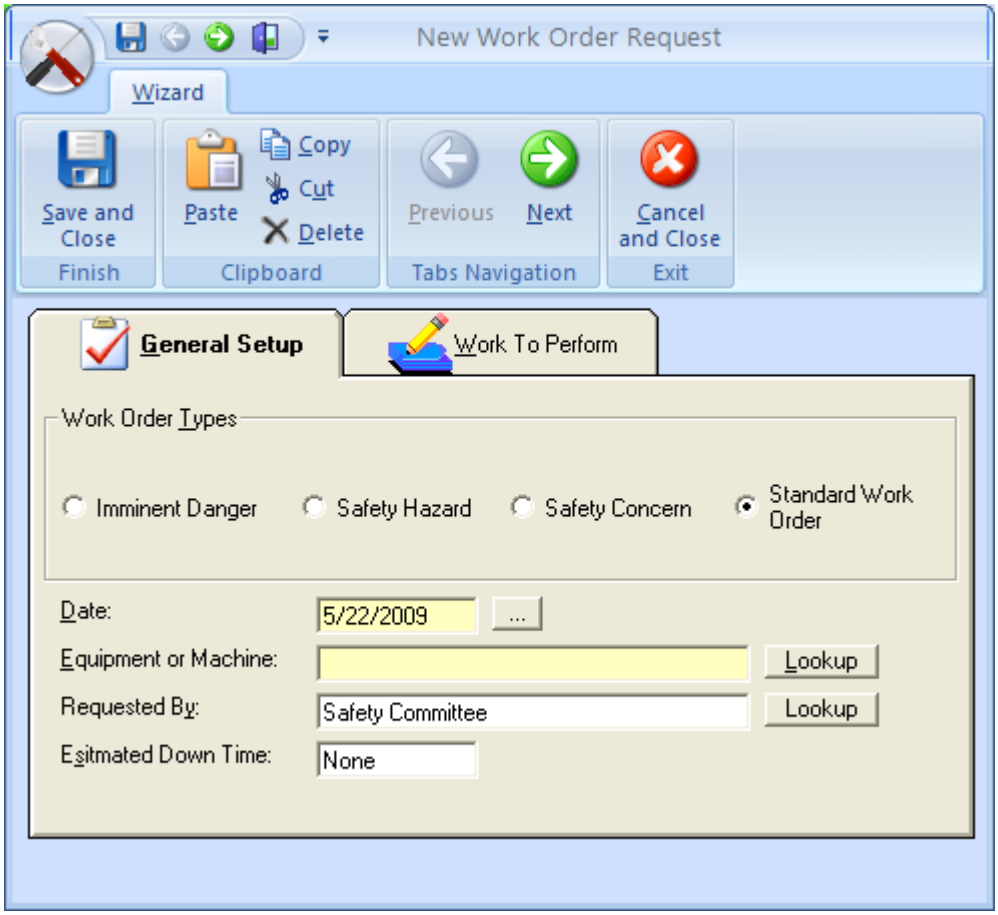


- Select the task you want to edit from within the grid.
- Click on the *Edit Task* button in the ribbon.
- Move to the various fields and edit them to your liking.
- Click the *Save and Close* button in the ribbon.

Creating a Work Order from a Punch List Item

You may want to create work orders so the maintenance department can take care of many of your punch list items.

To create a Punch List work order:



- Locate and select the task item that you want to create a work order for from within the *Punch List* section.
- Click on the *Edit Task* button in the ribbon.
- Click on the *Work Order* button in the ribbon.
- Move to the *Work Order Types* area and click on the option here that best describes the type of work order you're creating.

- Move to and click on the … button adjacent to the *Equipment or Machine* field. Select the name of the equipment you want to assign to this work order from within the grid.
- Click the *Select* button.
- Move to the other fields and enter the appropriate information.
- When you're done with this tab, click the *Next* button to move to the next.
- Edit the fields on the *Work to Perform* tab to your liking.
- Click the *Save and Close* button.

Deleting a Task from the Punch List

To delete a task:

- Select the task you wish to delete by clicking on it from within the *Punch List* grid.
- Move to and click on the *Delete Task* button in the ribbon.

Purging all Completed Tasks

To delete all completed tasks from the *Punch List*:

- Open the *Module* menu and select the *Purge Completed* option.
- When the *Purge Records* dialog appears, move to and click on the *Yes* button.

Sorting the Punch List

You can have your *Punch List* sorted by either the tasks *Dates* or *Priority* fields.

To sort the database by dates:

- Move to and click on the *Sort by Date* option in the ribbon.

To sort the database by priority indicators:

- Move to and click on the *Sort by Priority* option in the ribbon.

Printing the Punch List

To print all open tasks within the *Punch List*:

- Move to the *Safety Tasks* screen.
- Move to and click on the *Print List* option in the ribbon.
- Now move to and click on the *Print* button on the preview screen to send the report to the default printer.

MAINTENANCE COORDINATOR SYSTEM

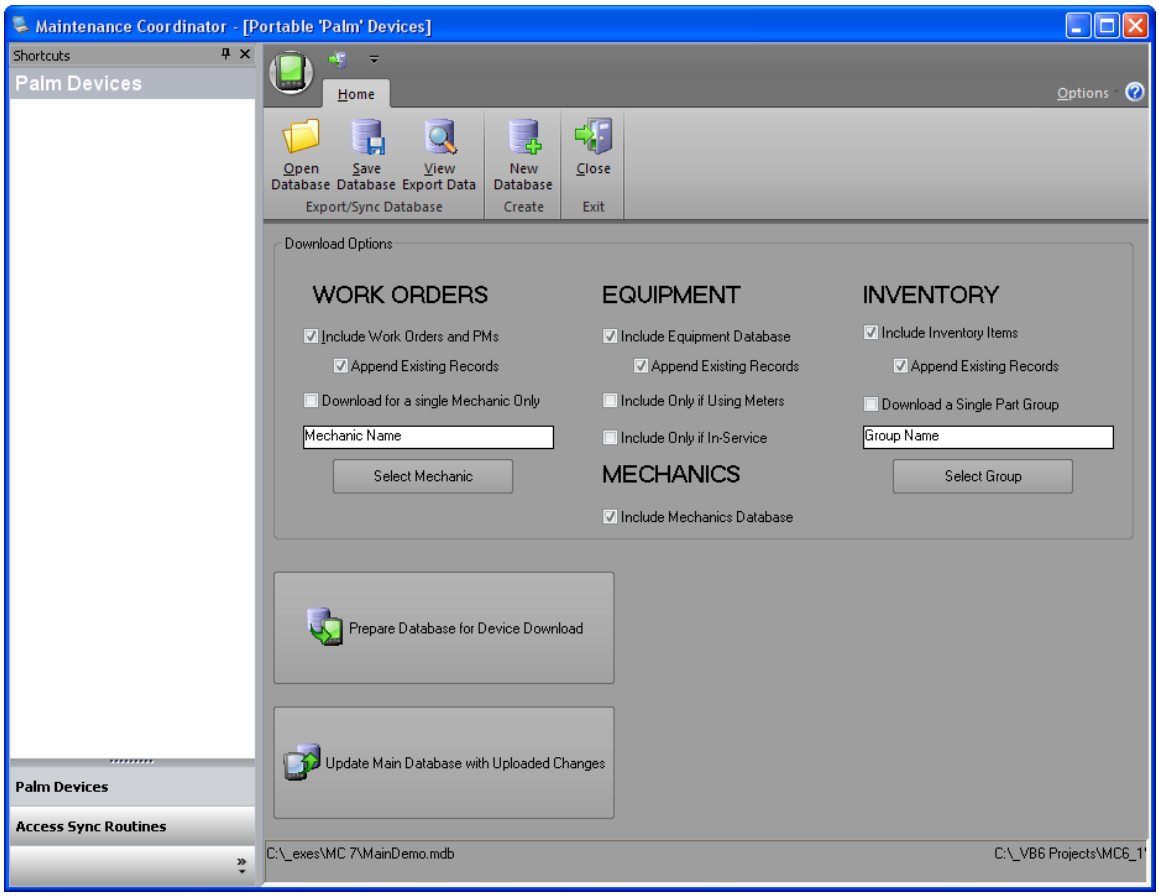
Portable Computers

SIMPLICITY
Software Technologies Inc.

TABLE OF CONTENTS

Portable Computers (Devices) Module

The Portable Devices module provides support for devices you take out in the field with. With it you can synchronize databases to Palm Devices, or any Windows compatible laptop. However, with Database Synchronization routines you are not really limited to only these devices. You can synchronize you database to database on portable devices, stored on remote servers, or servers in the cloud.



Maintenance Coordinator Mobile

The Maintenance Coordinator – Mobile application is an extension of our normal Maintenance Coordinator series of CMMS applications and is designed to allow you to take a portion of Maintenance Coordinator with you on the road. We designed the portables software to perform as closely as possible as the way it performs on desktop computers.

There are actually two versions of Maintenance Coordinator – Mobile. One is designed to work on any Palm compatible hand-held computer supporting Palm OS 3.0 or higher. The other is for use with Symbol SPT portable computers that also provides barcode scanning abilities. The two applications work the same except one supports the reading of barcodes where the other does not.

Many programs that work with portable devices write synchronized information directly back to the main database. This is a nice feature and saves the user a few steps compared to how we do it. We synchronize information to a special export database designed specifically for this purpose.

The advance of doing it our way is as follows. First of all, we don't believe you want to download all the information from Maintenance Coordinator to the portable devices, as this amount of information could be extremely large and quickly fill the device's available storage. You may also find that it's better to only download the information that is relevant to what you want to do. Say all the work orders belonging to a single mechanic, for example, or just equipment that use meters, or parts that belong to a single group.

Writing synchronized information to a special database provides a couple of other advantages too. One, sync operations are much faster with smaller databases. The portable device's lookup and sort routines are faster working with smaller databases, and synchronizing with a special database allows us to work with that data before writing it back to the main database, such as saving to History logs for example.

Another really nice feature about the way we do it is that each mechanic can have their own synchronized (export) database setup, synchronizing only the information relevant to their job or duties without effecting information used by others. If you have multiple users working off the same machine, you should grow to appreciate the fact that each user can have their own export database.

With the above described setup, you could have a working environment something like the following:

All your mechanics turn over their portable computers to an administrator when they go home at night. In the morning, that administrator uploads all the changes those mechanics did the previous day and updates the main databases. The administrator then downloads new information relevant to each mechanic to their individual portable computers. When the mechanics return the next morning the portable computers are handed back out, and the mechanics are set for the day.

The above example is just one of many ways to use this feature. We hope you enjoy this powerful feature as it also helps to bring you a paperless work order system to an already powerful and feature rich CMMS system.

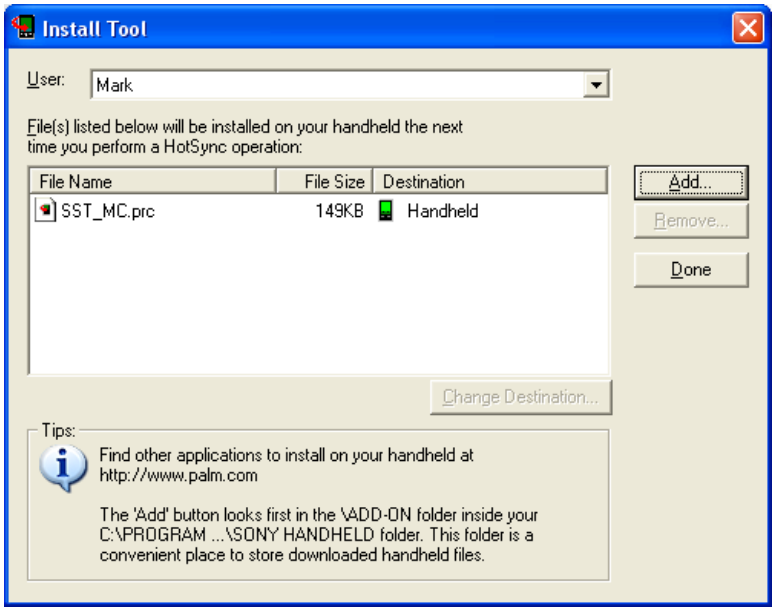
Compatible Devices

The following devices are supported for use with Maintenance Coordinator – Mobile:

- Any hand-held computers with a Palm OS 3.0 or higher.
- Symbol SPT hand-held computers
  - SPT-1550 or
  - SPT-1800

Installing Maintenance Coordinator – Mobile

The following outlines the steps needed to install Maintenance Coordinator – Mobile onto your hand-held device.



- Start Maintenance Coordinator in your normal way.
- Navigate to the *Portable Devices* module.
- Click on the *Module* button and select *Prepare to Install to Device*
- Then select to install to:
  - *Install to Palm Device* (Any Palm compatible computer with an operating system of 3.0 or higher).
  - *Install to Palm Scanner Device* (Any Installs to any Palm compatible computer that also support barcode scanning).
- Exit all the way out of Maintenance Coordinator
- Start the (Palm) Desktop software that came with your hand-held computer.

- Move to the navigation bar location on the left side of the software and click on the *Install* icon.
- Browse to the following directory: C:\Program Files\SST\Maintenance Coordinator.
- Select the file: "SST_MC.prc" as the file to install and click Open.
- Perform a *Hot Sync* operation from your portable computer.

Please note that you can install the software designed for *Palm Hand-Held* on to any Palm OS 3.0 or higher compatible computer with no problems, including the one supporting scanners. But you can not install the software designed for *Scanners* to any device other than Symbol SPT compatible computers or the program will not run.

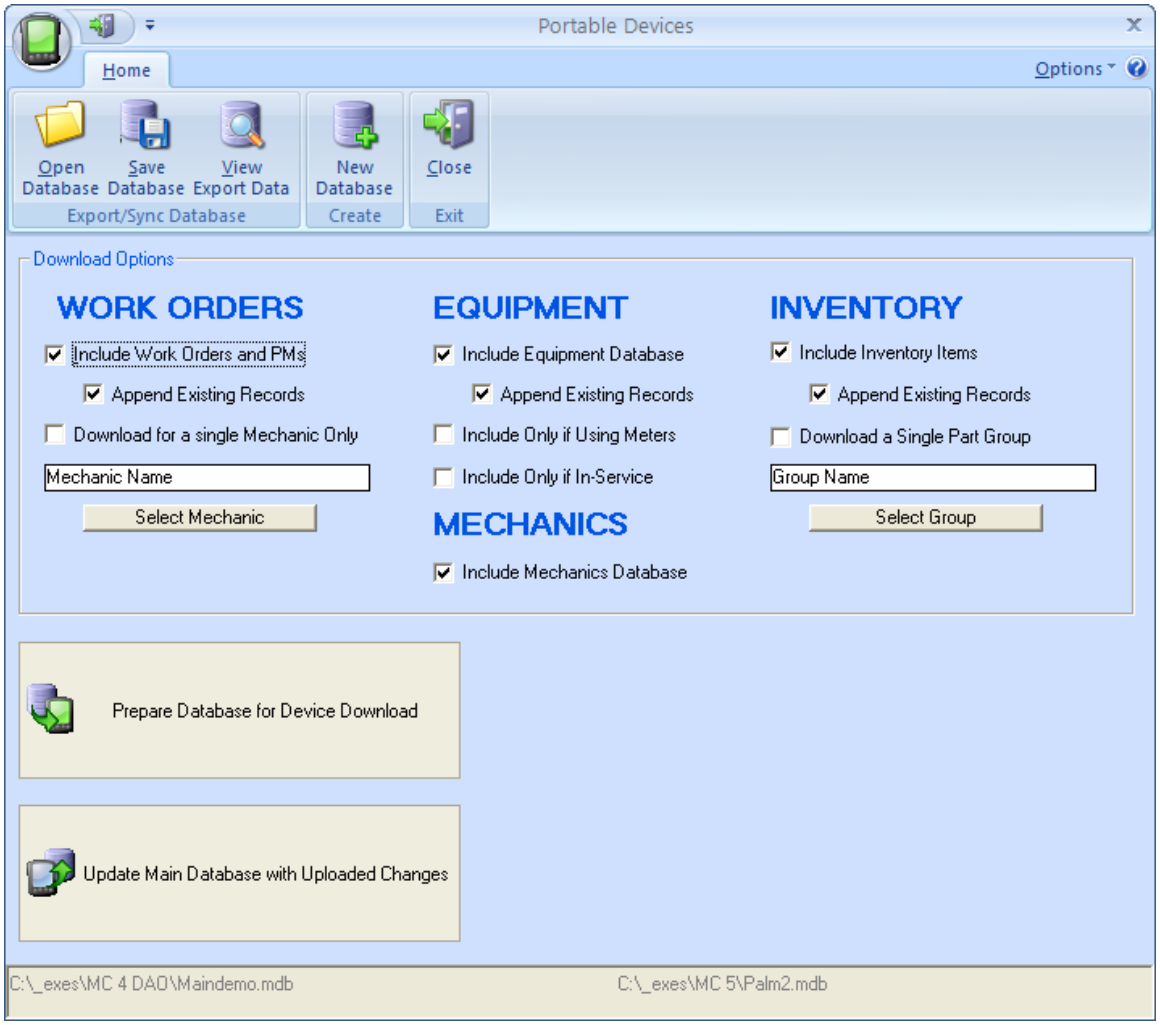
Desktop Software Not Supplied

If your hand-held computer did not come with Palm Terminal Desktop Software you may want to visit the following web sites to find the software for downloading:

http://devzone.symbol.com
http://www.palm.com/us/support/downloads/win_desktop.html

Using the Portable Devices Module

The following section will outline the features of the Portable Devices Module. Immediately following this section we will outline the Maintenance Coordinator – Mobile software installed on the hand-held device.



The purpose of the Portable Devices module is to prepare databases to be synchronized with the databases on portable computers running the Maintenance Coordinator – Mobile software. It's also used to write changes made to databases while on the hand-held device back to the Maintenance Coordinator's main databases.

Completed Work Orders

When a work order has been marked as completed and the *Update Main Database with Uploaded Changes* routine is invoked, the following occurs:

- Any changes made to the record by the hand-held device are written back to the main database.
- If the "Auto Save to Equipment History" option is turned on, and a piece of equipment is assigned to the work order, a summary of the completed task is saved to the Equipment History log.
- The completed work order is deleted from the Export/Sync database, but remains in the main database.
- During the next Hot Sync operation, the sync operation should see that it's been removed from the Export database and remove it from the hand-held device too.

Auto Save to Equipment History

This option when turned on will save a summary of a completed work order to the Equipment History log when a piece of equipment has been assigned to a work order, and if this option is chosen on the hand-held computer for the effected work order.

To toggle the *Auto Save to Equipment History* feature on or off:

- Click on the ribbon Module button and select the *Auto Save to Equipment History* option.
- Answer the popup question as to what you want to do. Turn the feature on or off.

Note: A highlighted selection indicates the feature is turned on.

Auto Update with Download

When this option is turned on, the program will automatically write any changes made by the last sync operation back to the main database prior to writing the new information to the Export database. This has the same effect as clicking the

Update Main Database with Uploaded Changes button just prior to clicking the *Prepare Database for Device Download* button.

To toggle the Auto Update with Download feature on or off:

- Click on the ribbon Module button and select the *Auto Update with Download* option.
- Answer the popup question as to what you want to do. Turn the feature on or off.

Note: A highlighted selection indicates the feature is turned on.

Install to Device Option

See *Installing Maintenance Coordinator – Mobile* section for information on this option.

Create New Export Database

When using this module to build export databases for more that one person, you will want to create a new Export/Sync database for each person. This way each person will only see information needed by them in the database, and not a lot of wasted information not related to their needs. This is great for giving employees copies of work orders they need to complete, and filtering out work orders they are not assigned to.

To create a New Export Database:

- Move to the *Create* group in the ribbon and select the *New Database* option
- With Export Database dialog navigate to where you want to save this new database. It is suggested that you create a folder to keep these databases in.
- Type in a descriptive name in the *File Name* field, maybe something like the person's name that will be assigned to the database (i.e., John Doe.mdb).
- Click the *Save* button.

Open or Set Sync Database

Whenever you are about to update information in an export/sync database, it is necessary to tell the program which export database to use. This is a very necessary step before any Hot Sync operation is performed. Whichever database that was last set, will be the one used by the next Hot Sync operation. If you Hot Sync to the wrong database, any current information in both the Hand-Held database and Export database maybe changed to a state that it's not usable.

The path of the last recorded sync/export database is shown on right hand side of the module's status bar. The path that is shown on left hand side indicates the main database path currently used by Maintenance Coordinator.

To Open or Set Sync Database:

- Move to *Export/Sync Database* group in the ribbon and select the *Open Database* option.
- With the *Export Database* dialog, navigate to where you have your export databases stored.
- Click on the file name that you want to use, or type it in the *File Name* field.
- Click the *Open* button.

Save Current Sync Database

Before you open or set a new sync/export database you should save the current database to a safe location, this will safe guard its information for the next time you need to use it.

To save the current Sync Database:

- Move to *Export/Sync Database* group in the ribbon and select the *Save Database* option.
- With *Export Database* dialog navigate to where you want to save this database. It is suggested that you overwrite its last saved name and directory.
- Type in a descriptive name in the *File Name* field.
- Click the *Save* button.

Setting Exports / Sync Options

This section outlines the options available for synchronizing the databases on the hand-held computers and the desktop databases.

Work Orders Export / Sync Options

Placing a checkmark in the *Include Work Orders and PMs* checkbox will allow the Work Orders database to be exported to or synchronized with the hand-held device. Removing the checkmark will delete all the work orders presently in the export database, and should delete most of them on the hand-held device during the next Hot Sync operation.

Placing a checkmark in the *Append Existing Records* checkbox basically does the following:

It will allow the hand-held database and the export database to synchronize information during the next Hot Sync operation. If new records are added, they will be added to both databases, and deleted records will be removed. **This is our recommended way of dealing with the databases.**

Removing a checkmark in the *Append Existing Records* actually deletes all the records on the export database, and then adds the new records by the criteria you have set up. If you use this option, you may want to actually delete the appropriate table from the hand-held device also. Not deleting the table on the hand-held device could cause duplicate records to appear on the hand-held device. Some devices however may not allow you to delete a single table without removing the entire program.

Placing a checkmark in the *Download for a Single Mechanic Only* checkbox allows you to download work orders belonging to only a single mechanic. This option also requires you to select a mechanic to download for.

To select a mechanic for the Export option:

- Place a checkmark in the *Download for a Single Mechanic* checkbox.
- Click on the *Select Mechanic* button.
- From the *Select Mechanic* dialog, click on the *Select Mechanic* button.
- From the *Employees Database* lookup, locate and click on the mechanic's record you want to use from those listed in the grid.
- Click the *Select* button.
- Next select the *Scheduled Start* and *End dates* of the work orders you want to include.

- To include all open work orders for the selected mechanic place a checkmark in the *Include All Dates* checkbox.
- Click the *Ok* button.

Work Order Parts and Labor Databases

These two database tables are used by work orders in the system to track and record resources used in the completion of work orders. These two tables following the same rules that applies to the normal work orders table.

Equipment Export / Sync Options

Placing a checkmark in the *Include Equipment Database* checkbox will allow the Equipment database to be exported to or synchronized with the hand-held device. Removing the checkmark will delete all the equipment records presently in the export database, and should delete most of them on the hand-held device during the next Hot Sync operation.

Placing a checkmark in the *Append Existing Records* checkbox basically does the following:

It will allow the hand-held database and the export database to synchronize information during the next Hot Sync operation. If new records where added, they will be added to both databases. The same holds true with deleted records will be removed. **This is our recommended way of dealing with the databases.**

Removing a checkmark in the *Append Existing Records* actually deletes all the records on the export database, and then adds the new records by the criteria you have set up. If you use this option, you may want to actually delete the appropriate table from the hand-held device also. Not deleting the table on the hand-held device could cause duplicate records to appear on the hand-held device. Some devices however may not allow you to delete a single table without removing the entire program.

Placing a checkmark in the *Include Only if using Meters* checkbox, will include only those equipment records that have their *Use Meters* flag set. This option is useful for collecting meter readings out in the field.

Placing a checkmark in the *Include only if In-Service* checkbox will only include those equipment records that are set as “In-Service”.

Mechanics Export / Sync Options

Placing a checkmark in the *Include Mechanics Database* checkbox will allow the *Mechanics* database to be exported to the hand-held device. Removing the checkmark will delete all the mechanics records presently in the export database, and should delete most of them on the hand-held device during the next Hot Sync operation.

Note: You are not allowed to edit mechanic records on the hand-held computer. They are there only for reference and for assigning to and working with work orders.

Inventory Export / Sync Options

Placing a checkmark in the *Include Inventory Items* checkbox will allow the Inventory or Parts database to be exported to or synchronized with the hand-held device. Removing the checkmark will delete all the inventory items presently in the export database, and should delete most of them on the hand-held device during the next Hot Sync operation.

Placing a checkmark in the *Append Existing Records* checkbox basically does the following:

It will allow the hand-held database and the export database to synchronize information during the next Hot Sync operation. If new records where added, they will be added to both databases, and any deleted records will be removed. **This is our recommended way of dealing with the databases.**

Removing a checkmark in the *Append Existing Records* actually deletes all the records on the export database, and then adds the new records by the criteria you have set up. If you use this option, you may want to actually delete the appropriate table from the hand-held device also. Not deleting the table on the hand-held device could cause duplicate records to appear on the hand-held device. Some devices however may not allow you to delete a single table without removing the entire program.

Placing a checkmark in the *Download for a Single Part Group* checkbox allows you to download parts belonging to only a single Part Group. This option also requires you to select a Group to download for.

To select a Part Group for the Export option:

- Place a checkmark in the *Download for a Single Part Group* checkbox.
- Click on the *Select Group* button.
- From the *Group Selection* lookup, locate and click on the group's name that you want to use from those listed in the grid.
- Click the *OK* button.

Prepare Database for Device Download

This option both writes and deletes records from export database by the criteria you have setup for the various database tables. It is highly recommended that you perform an *Update Main Database with Updated Changes* operation prior to performing this routine. This will ensure that any changes or synchronized information is written back to the main databases prior to replacing it in the export database.

You can have this feature activated for you automatically by turning on the *Auto Update with Download* option.

To update the export database with new criteria:

- Set or open the Export database you want to prepare.
- Set up all export criteria for the various tables as outlined earlier.
- Click on the *Prepare Database for Device Download* button.

Update Main Database with Uploaded Changes

This feature updates the main Maintenance Coordinator databases on the desktop computer with any changes made on the hand-held computer. In order for this to work properly however, the two databases need to be synchronized with a Hot Sync operation prior to performing it here.

To update the Main Database with Uploaded Changes:

- Set or open the Export database you want to sync with.
- Perform a Hot Sync operation between the hand-held computer, and desk top computer, and the current export databases.
- Click the *Update Main Database with Uploaded Changes* button.

Maintenance Coordinator – Mobile

This section will outline the use of **Maintenance Coordinator – Mobile**, the software that you use on the hand-held computers. As mentioned before there are actually two versions of this software. The standard edition and the one made to be used with Symbol SPT devices. The procedures for using both of these versions are almost identical, and we will outline the differences as they present themselves. Basically, if a scanner feature is available it will be highlighted by the bolded word **SCANNER**.

Starting Maintenance Coordinator – Mobile

Once installed as outline earlier in this chapter, you will want to run Maintenance Coordinator – Mobile.

To start Maintenance Coordinator – Mobile:

- Turn on the hand-held computer.
- Move to the Applications launcher on the hand-held computer.
- Locate the SST MC icon and tap it.

Navigating with Maintenance Coordinator – Mobile

Maintenance Coordinator – Mobile is designed to function much like the full-blown version on your desktop. Like your desktop application, this version is broken into modules.

To navigate between the modules:

- Move to the *Main Menu.*
- Tap on button that best describes the module you want to open.

To get back to the *Main Menu* just keep closing open screens until the *Main Menu* screen appears.

Work Orders (Lookup)

With the *Work Orders* lookup screen you can locate work orders for viewing, editing, or you can create new work orders. There are also sort options available to help locate work orders quickly.

To move to the Work Orders lookup screen:

- Move to the *Main Menu.*
- Tap on the *Work Orders* button.

To open a Work Order for viewing or editing:

- Tap on the work order from those listed.

To locate a specific work order:

- Move to the *Work Orders* lookup screen.
- Tap in the *Find* field.
- Enter the *Task ID* or part of it in the space provided. The list will be sorted by the information entered here.

To show all work orders by the Default Sort:

- Move to the *Work Orders* lookup screen.
- Open the *Sort* menu and select the *Default Sort* option.

To show all work orders (including those marked as completed):

- Move to the *Work Orders* lookup screen.
- Open the *Sort* menu and select the *Show All* option.

To show all work orders assigned to a single piece of Equipment:

- Move to the *Work Orders* lookup screen.
- Open the *Sort* menu and select the *Single Equipment* option.
- From the *Select Task Equipment* popup, tap on the equipment of your choice.

SCANNER: To show all the work orders for a single piece of equipment, simply scan the Equipment's barcode from within the *Work Orders Lookup* screen.

To view the Work Order Details:

- Tap on the work orders from those listed.

To Close the Work Order Lookup and Return to the Main Menu:

- Tap on the *Cancel* button.

Adding new Work Orders

To add new work orders:

- Move to either the *Work Orders Lookup* screen or move to the *Work Orders Schedule* screen by tapping on the appropriate button in the *Main Menu*.
- Open the *File* drop down menu and select the *Add Record* option.
- Edit the new record to your liking, then tapping the *Done* button to save changes.

Purging Completed Work Orders

You can delete all completed work orders from the hand-held device, but this is not really recommended. If you delete them here, completion information will be lost, and not written back to the main database. It is best to let the Maintenance Coordinator's Portable Devices module handle these deletions after it has updated the main databases.

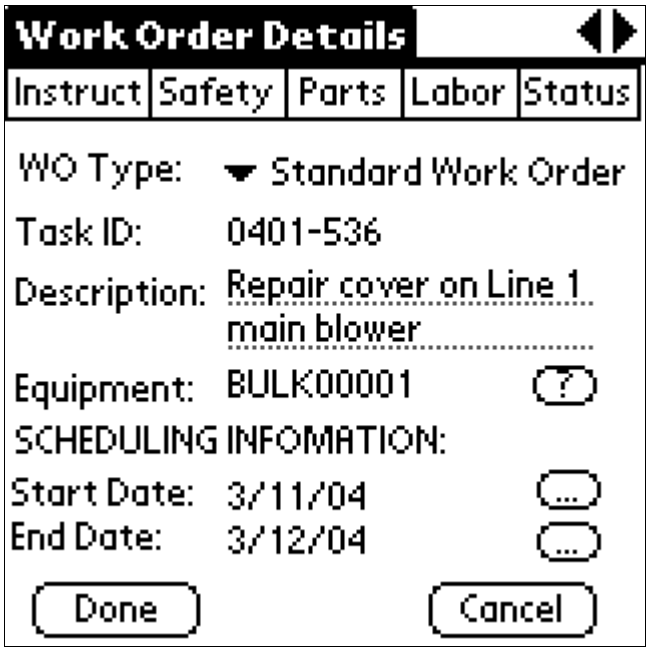
Also, when work orders have been marked as completed, it will no longer show up in default sorts. To find completed work orders that are still in the database, you will have to sort the database by *View All*.

To delete all completed work orders:

- Move to the Work Orders lookup screen.
- Open the *File* menu and select the *Purge Completed WOs* option.

Work Orders Details

You can view and edit a work order record from the *Work Orders Details* screen. You can also branch to other details from the screen such as to Task Instructions, Safety Instructions, and Work Orders Status/Completion information.



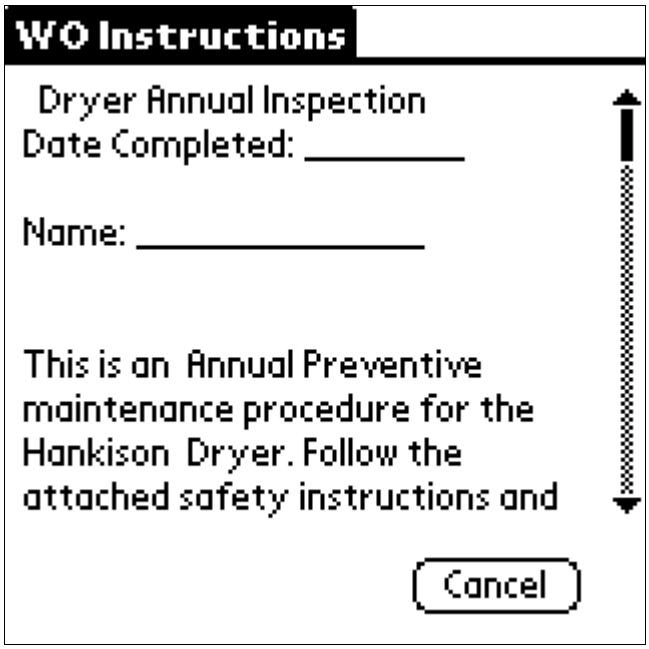
To edit a work order:

- Move to the *Work Orders* lookup screen or *Work Orders Schedule* screen.
- Tab on the work order you want to edit from within the list, or add new from the *File* menu.
- Move to the *WO Type* drop down, and tap on the down arrow located there.
- Now scroll through the list and tap on the work order type you want to assign to this work order.
- Move to the *Description* field and tap in it. Edit this field to your liking.
- Move to the lower section and tap on the two … buttons adjacent to the date fields.
- From the pop-up calendar select the appropriate dates by tapping on them.
- To select a piece of equipment to assign to this task, open the *File* menu and tap on the *Select Equipment* option.
- Tap on the equipment of your choice to assign it to this work order.
- Tap the *Done* button to save your changes.

The ? (Question mark) button next to the *Equipment* field displays information about the currently assigned piece of equipment, but only if one has been assigned, and only if it's in the database.

View or Edit Work Order Instructions

You can edit work order task instructions for all single shot type work orders. These include the 3-safety related types and the standard work order type. For recurring work orders, such as a Standard PM, Mini-PM or Change-Over, these instructions can only be viewed.



To view a Work Order's Instructions:

- Move to the *Work Orders* lookup screen or *Work Orders Schedule* screen.
- Tap on the work order you want to view or edit from within the list or *Add New* from the *File* menu.
- From the *Work Orders Details* screen, tap on the *Instruct* button.
- To edit the instructions, tap in the instructions field, and edit its contents to your liking. Tap *Done* to save your changes.
- If the *Done* button is not visible, this means you can only view the instructions, in which case tap the *Cancel* button when done.

To View a Work Order's Safety Instructions

Each work order can have safety instructions assigned to them. These are assigned by the Maintenance Coordinator desktop application and are not editable on the hand-held.

To view a Work Order's Safety Instructions:

- Move to the *Work Orders* lookup screen or *Work Orders Schedule* screen.
- Tap on the work order you want to view or edit from within the list or *Add New* from the *File* menu.
- From the *Work Orders Details* screen, tap on the *Safety* button.
- When you are done viewing the safety instructions, click on the *Cancel* button.

Work Order Parts

You can add parts to be used in the completion of work orders with the mobile software much like you can with the desktop software.

To add or record parts used for work order completion:

- Move to the *Work Orders* lookup screen or *Work Orders Schedule* screen.

- Tap on the work order you want to view or edit from within the list.
- From the *Work Orders Details* screen, tap on the *Parts* button.

To add a part to the work order:

- Tap the *Add Part* button.
- From the *Select Inventory Item* lookup screen tab the part that you want to add from those listed.
- Tap the *Select* button

To edit the quantity needed or used:

- Tap on the part you want to edit the quantities for from those listed.
- Move to the appropriate fields and edit the information to your liking.
- Click the *Save* button.

To delete a part from this work order:

- Tap on the part you want to delete from those listed.
- Move to and click on the *Remove* button.

Work Order Labor

You can add labor needed or used in the completion of work orders with the mobile software much like you can with the desktop software.

To add or record labor used for work order completion:

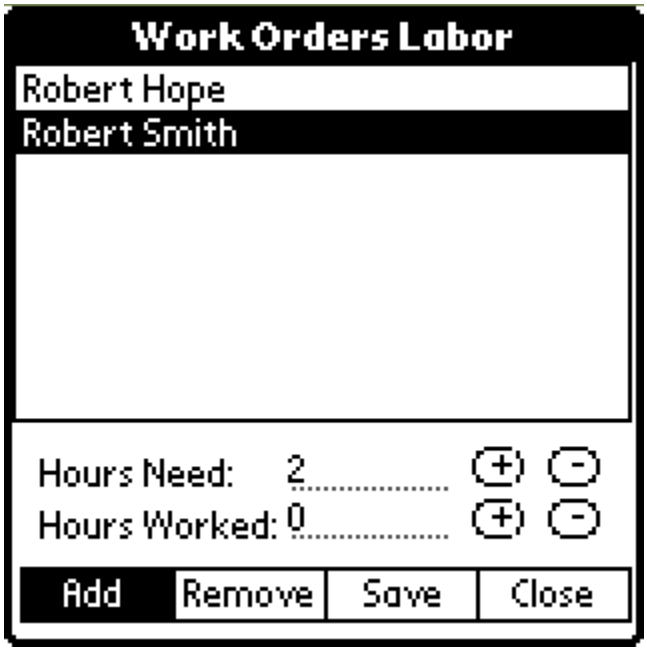
- Move to the *Work Orders* lookup screen or *Work Orders Schedule* screen.
- Tap on the work order you want to view or edit from within the list.
- From the *Work Orders Details* screen, tap on the *Labor* button.

To add a mechanic to the work order:

- Tap the *Add* button.
- From the *Mechanics/Employees* lookup screen tab the mechanic that you want to add from those listed.

- Tap the *Select* button

To edit the man hours needed or used:



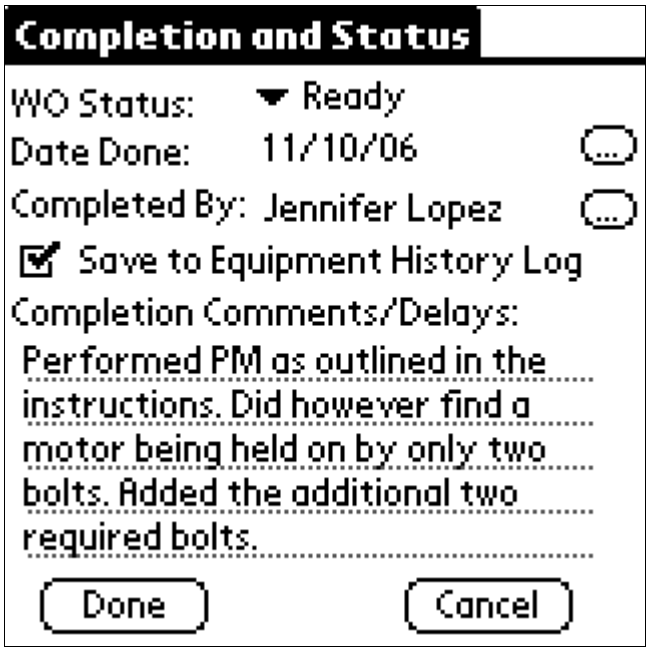
- Tap on the mechanic you want to edit the hours on from those listed.
- Move to the appropriate fields and edit the information to your liking.
- Click the *Save* button.

To delete a mechanic from this work order:

- Tap on the mechanic you want to delete from those listed.
- Move to and click on the *Remove* button.

View or Edit Completion or Status Information

You can view or edit a work order's status and completion information in the program, and have this information written back to the main databases.

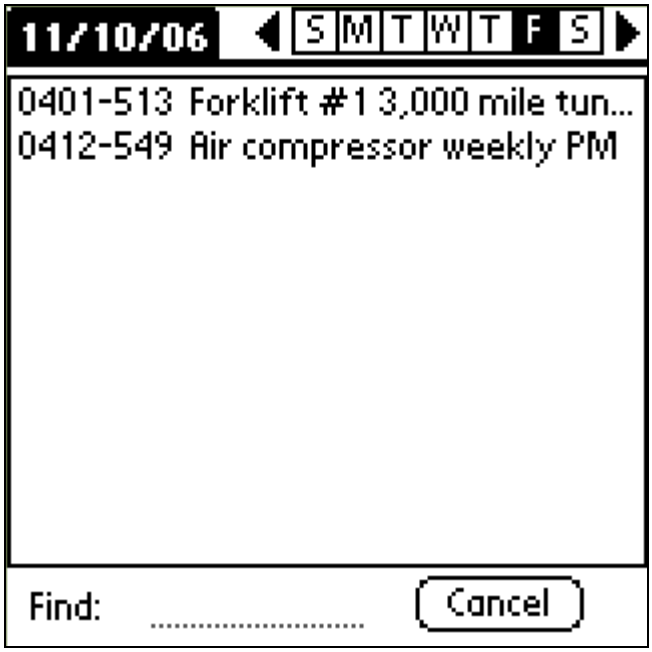


To record Status and Completion Information:

- Move to the *Work Orders* lookup screen or *Work Orders Schedule* screen.
- Tap on the work order you want to view or edit from within the list or *Add New* from the *File* menu.
- From the *Work Orders Details* screen, tap on the *Status* button
- Move to the *WO Status* drop down, and tap on the down arrow located there.
- Now scroll through the list and tap on the work order status type you want to assign to this work order.
- Tap on the … button adjacent to the *Date Done* field
- From the pop-up calendar select the appropriate date by tapping on it.
- Tap on the … button adjacent to *Completed By* field.
- Select a mechanic from the popup list and then by clicking on them from within the list.
- Click the *Select* button.
- To have the *Mobile Device* module write completion information back to the equipment history log, place a checkmark in the *Save to Equipment History Log* checkbox.
- Move to the *Completion Comments/Delays* field and tap in it. Now edit this field to your liking.
- Tap the *Done* button to save your changes.

Work Orders Schedule

The *Work Orders Schedule* module works much like the *Work Orders* (Lookup) module as it allows you to select work orders for viewing or editing. The main difference between the two is how the work orders are sorted. With the *Work Orders Schedule* module work orders are sorted or grouped by scheduled start dates.



To move to the *Work Orders Schedule* module:

- Move to the *Main Menu.*
- Tap on the *Work Orders Schedule* button.

To open a work order for viewing or editing:

- Tap on the work order from those listed.

To locate a specific work order:

- Move to the *Work Orders Schedule* screen.
- Select the date you think the work order is scheduled to start.
- Tap in the *Find* field.

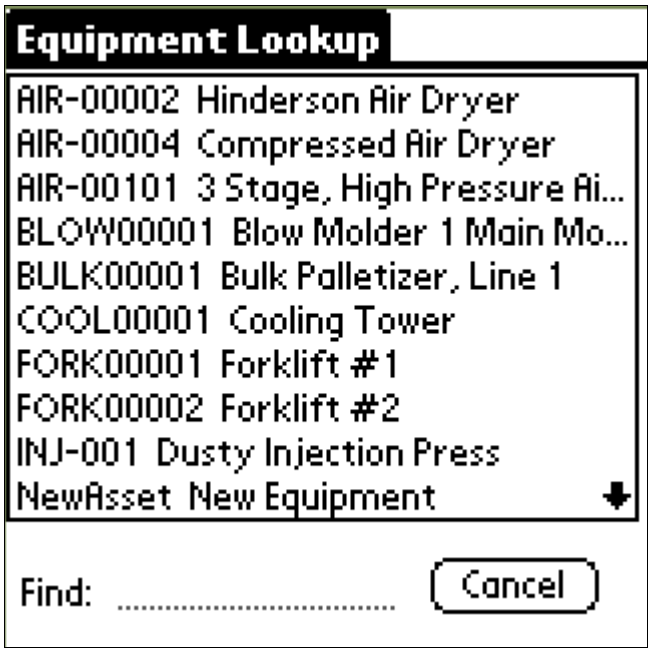
- Enter the *Task ID* in the space provided. The list will be sorted by the information entered here and by the selected date.

To change the dates of the Work Order Schedule:

- Tap on the day-of-the-week button that you want to see scheduled work orders for.
- Tab on the *left arrow* to move the dates backwards one week at a time.
- Tap on any of the weekday buttons to view the tasks schedule to start on that day. The selected date will appear in the caption area
- Tab on the *right arrow* to move forward one week at a time.
- To go to today's date open the *Dates* menu and then tap the *Today* option.
- To select a specific date, open the *Dates* menu and tap the *Select Date* option. Then select the appropriate date from the pop-up calendar by tapping on it.

Equipment Database

The Equipment Database allows you take information with you about your assets or equipment. This information is used with work orders, when assigning equipment to work orders is necessary. It also helps to simplify the collection of meter readings by taking the appropriate information with you out to the field.



To move to the Equipment Database:

- Move to the Main Menu
- Tap on the *Equipment Database* button.

To open an Equipment record for viewing or editing:

- Tap on the equipment record from those listed.

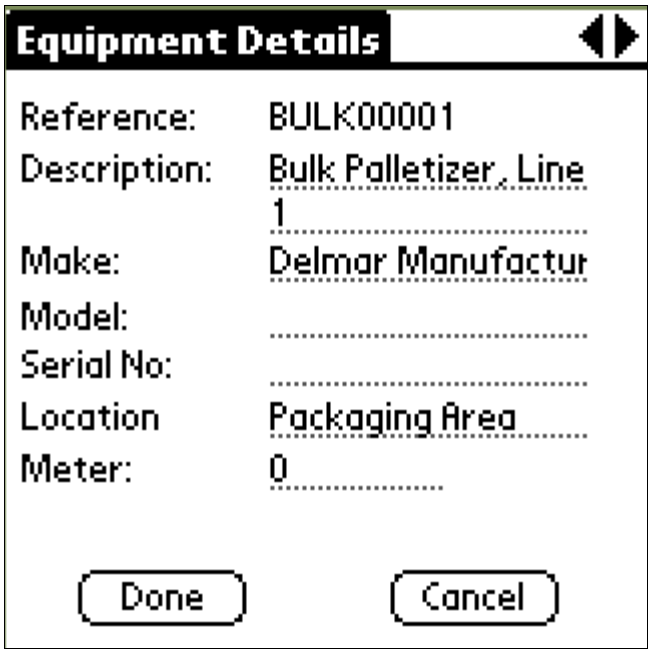
To locate a specific asset:

- Move to the *Equipment Database*.
- Tap in the *Find* field.
- Enter the *Equipment Reference* in the space provided. The list will be sorted by the information entered here.

SCANNER: To quickly find a piece of equipment, simply scan the Equipment's barcode from within the *Equipment Lookup* screen.

Equipment Details

The *Equipment Details* screen allows you to view or edit information about your equipment and other assets. This is also where you would record meter readings.



To view or edit an Equipment record:

- Move to the *Main Menu.*
- Tap on the *Equipment Database* button.
- Tap on the equipment record from those listed to move to the *Equipment Details* screen.
- Tap in the various fields on this screen and edit the information found there to your liking.
- Tap the *Done* button to save your changes and exit this screen.

Inventory Database

The *Inventory Database* allows you take information with you about your parts and inventory. This information will come in handy for part room activates such as checking in parts, and removing parts from inventory. It will also help streamline inventory counts.

To move to the *Inventory* Database:

- Move to the *Main Menu*.
- Tap on the *Inventory* button.

To open an Inventory record for viewing or editing:

- Tap on the inventory record from those listed.

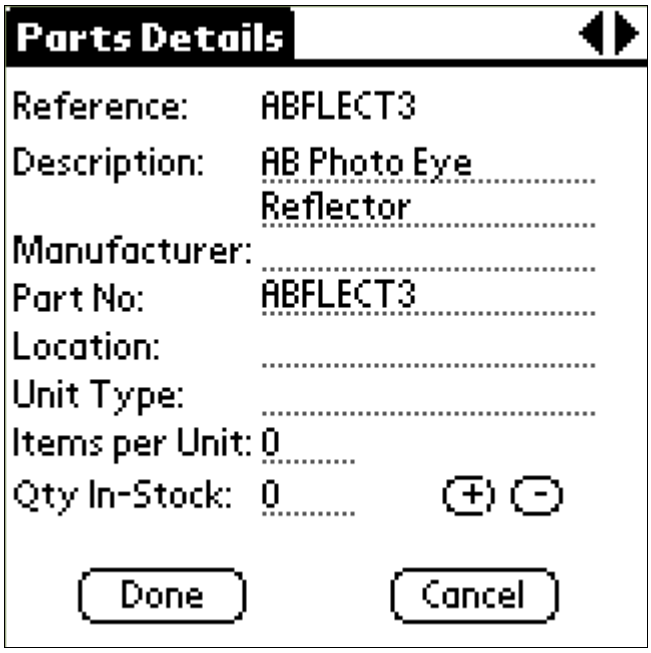
To locate a specific part:

- Move to the *Inventory* Database.
- Tap in the *Find* field.
- Enter the item's *Reference* in the space provided. The list will be sorted by the information entered here.

SCANNER: To quickly find an inventory record, simply scan the item's barcode from within the *Inventory Lookup* screen.

Parts Details

The *Parts Details* screen allows you to view or edit information about your inventory items. This is also where you would record current inventory levels.



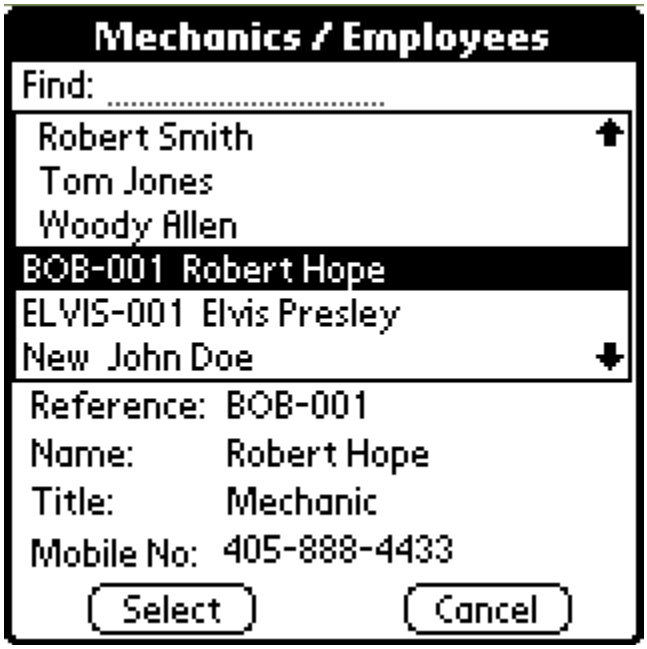
To view or edit a Parts record:

- Move to the *Main Menu.*
- Tap on the *Inventory Database* button.
- Tap on the inventory record from those listed to move to the *Parts Details* screen.

- Tap in the various fields on this screen and edit the information found there to your liking.
- To adjusted inventory levels up, tap on the + (plus) button. To adjust inventory levels down, tap on the – (minus) button.
- Tap the *Done* button to save your changes and exit this screen.

Mechanics Database

The Mechanics Database is used as reference material, and for assigning to various parts of work orders. This information is not editable from the mobile software, as it is with the other database.



To view a mechanic's record:

- Move to the *Main Menu.*
- Tap on the *Mechanics Database* button.
- Tap on a record from those listed to view the limited information provided.
- Tap on the *Cancel* button to exit this screen and return to the *Main Menu*.

To locate a specific mechanic:

- Move to the *Mechanics Database*.
- Tap in the *Find* field.
- Enter the item's *Reference* in the space provided. The list will be sorted by the information entered here.

PORTABLE DEVICES – ACCESS DATABASE SYNCHONIZATION

This document outlines the use of the Portable Devices – Database Synchronization Routines.
Please note that because of the nature of these routines a Site/Network License must have been purchased to use these routines.

Overview

With the introduction of Windows 8, Microsoft has added support for the use of tablets and other mobile based devices. With this in mind, we too decided to add more support for mobile devices by developing a new feature for our *Portable Devices* module.
The Synchronization routines can be used to synchronize databases on your local computer, on a remote server, or with databases stored on the internet (**Cloud storage**). This allows mobile use with laptops, Windows tablets, and more. This added ability allows use with disconnected databases while in the field or working in a remote location. When back in the office you can synchronize your databases updating both the Master and Replica databases with new and changed data.

Accessing the Access Sync Routines

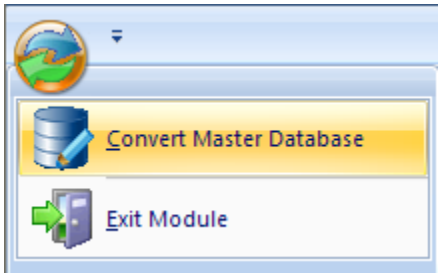
To access the **Access Sync Routines:**

- Click on the *Portable Computers* button from within the Main Menu of Maintenance Coordinator.
- From the *Portable Devices* module, move to the Shortcut bar on the far left of the screen and click on the *Access Sync Routines* button.

Making a Database Replicable

The first step in enabling replication is to create a *Master Database*. The Master Database is where you make structural changes to the database that you will be disperse to the *replica set*; changes to data are made in the *replicas* contained in the replica set. Making a database *replicable* makes the database a Design Master.
Important The process of making a database replicable can't be reversed. It is strongly recommended that you make a backup of your database before performing this operation.

To convert a normal database to make it a Deign Master (Replicable Master):

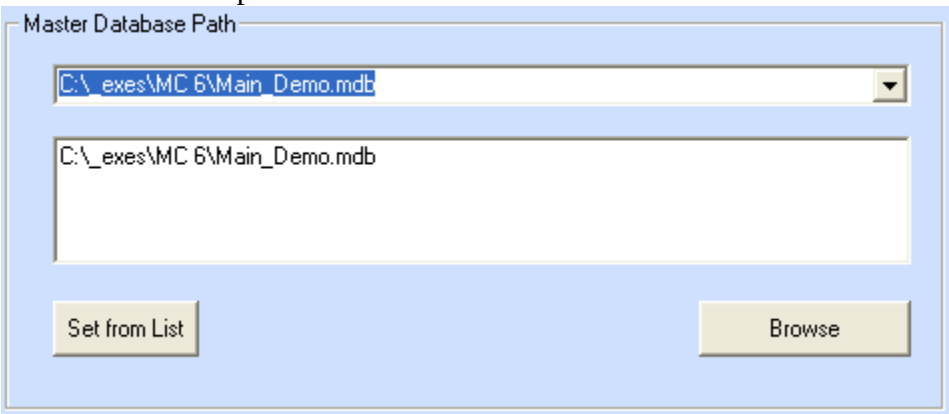


- Open the *Application menu* in the upper left hand corner of the ribbon control by clicking on it.
- Click on the *Convert Master Database* option.
- Browse to and select the Access database that you want to make a **Design Master.**
- Click on the **Open** button.

Creating a New Replica Database

Next you need to create one or more Replica Databases that will be used on the mobile or remote devices. This new replica will be used to sync information with the **Design Master** we made in the previous step.

To create a new replica database:



- Move to the *Master Database Path* section and click on the *Browse* button found there.

- Browse to and select the Access database that you want to use as the **Design Master.**
- Click on the *Open* button.

- Click on the **Create New Database** button in the ribbon.
- Browse to where you want to save this new database at.
- Move to the **File Name** field and type in a name for this new database.
- Click the **Save** button.

Performing a Synchronization on Two Databases

Once you have your Master and Replica databases setup, and you have some changes in either database you may want to perform synchronization on these two databases. The paths of these databases can be on a local drive, be on an indirect drive or stored on the internet.
The following are examples of acceptable paths for the synchronization of databases:

Master Databases	Replica Databases
`c:\NorthwindDM.mdb`	`c:\NwindReplica2.mdb`
`c:\Data\OrderEntry.mdb`	`www.mycompany.myserver.com/files/Orders.mdb`
`c:\NorthwindDM.mdb`	`\\MyRemoteServer\MyShare\NwindReplica.mdb`

To sync your databases:

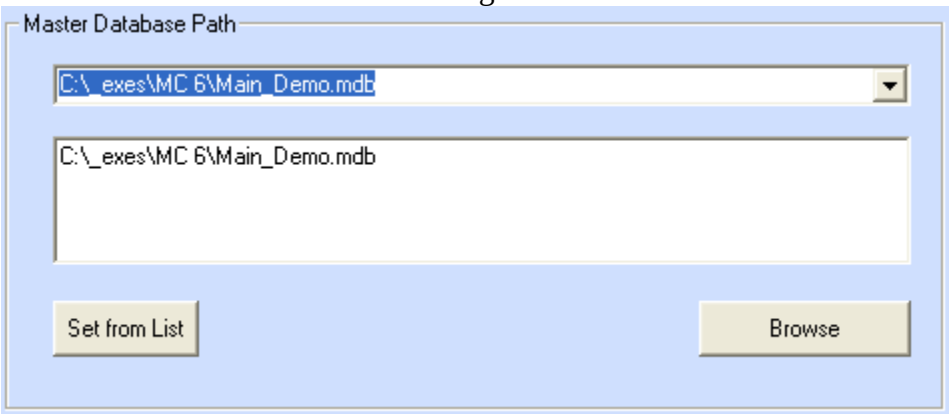
- Move to the *Master Database Path* section and click on the *Browse* button found there.
- Browse to and select the Access database that you want to use as the **Design Master.**
- Click on the *Open* button.
- Move to the *Replica Database Path* section and click on the *Browse* button found there.
- Browse to and select the Access database that you want to use as the **Replica.**
- Click on the *Open* button

- Move to the ribbon and click on the *Perform Synchronization* button.

NOTE: In place of using the Browse buttons you can also type in the paths for both of your databases in the spaces provided.

Setting the Master Database Path

There are two main methods of setting the Master Database Path



- Move to the *Master Database Path* section and click on the *Browse* button found there.
- Browse to and select the Access database that you want to use as the *Design Master***.**
- Click on the **Open** button.

Or you can…

- Move to the *Master Database Path* section and click on the down drop list found there.
- Select the database you want to use by clicking on it.
- Click on the *Set from List* button.

Note: The drop down list is populated from the database that are currently setup and in use by the Maintenance Coordinator system.

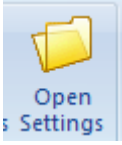
Saving Sync Settings

If you have synchronization settings that you reuse often it maybe to your advance to save these settings to file for easy reuse.
To save sync settings:

- Setup both the *Master Database Path* and the *Replica Database Path.*
- Click on the *Save Settings* button in the ribbon.
- Browse to where you want to save this new setting.
- Move to the *File Name* field and type in a name for this new file.
- Click the *Save* button.

Open Sync Settings

If you have synchronization settings saved to file that you would like to reuse:



- Move to the ribbon and click on the **Open Settings** button.
- Browse to where you have your settings file saved.
- Select the file and click **Open**.