MaintSmart

CMMS with Reliability Analysis

MaintSmart

version 5.0

Quick Start Tour

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Work Orders

Preventive Maintenance

Have a Question?

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How to Use the
Quick Start Tour

Overview
The quick start tour is designed to go through the basics of MaintSmart's powerful features. Procedures here will not be covered in detail; however you are encouraged to explore each screen further. To discover MaintSmart's features in-depth please download MaintSmart's User Guide which will cover all topics in detail.

Assumptions Before Using the Quick-Start Tour
This tutorial assumes you will:

1) Be using one of our demo databases we have provided.
   Note: For the purposes of this tutorial we will be using the manufacturing demo database.

2) Or you have already set up the basic configuration of MaintSmart to your specific needs.
   Note: For instructions on how to set up and configure MaintSmart, please see the full User Guide for details.

Information Regarding our Demo Version
Our demo version is access to the full functionality of MaintSmart limited to 30 active days. After 30 days your trial period will be over. If an extension is required, contact MaintSmart Support immediately.

The demo contains three demo databases:
1) Manufacturing Database
2) Facilities Data base
3) A blank database that you may configure with your own data.

If you decide to use a blank database, get the System ID as displayed under: **Help/ About/ License/Register**. Email that System ID to MaintSmart Support and be ready to call in with a PO number or credit card for immediate extension of the license.

Legend for Reading this Quick Start Tour
- Topics of special importance are in green text.
- **Notes**: will include additional information for better understanding of our features.
- Warnings are in red text.
- **Screen labels are in bold.**
- Items of emphasis are underlined.

Let's get started.
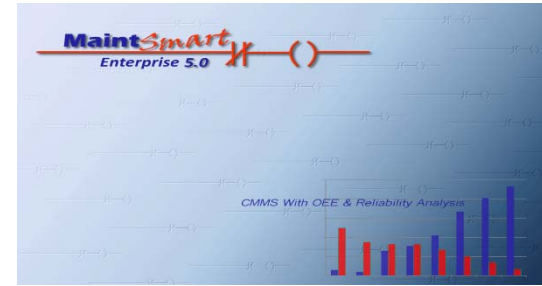
Start MaintSmart Program

MaintSmart
5.0

1) Start MaintSmart from the **Desktop** icon (Fig 1.0) or access through your **Start up Menu: Windows/Start/Programs/MaintSmart Enterprise/ MaintSmart Enterprise 5.0** (Fig 1.1)

FIGURE 1.1 – START MENU ACCESS

Maintenance
MaintSmart Enterprise
Help
MaintSmart Enterprise 5.0
Read Me
Scheduler Help
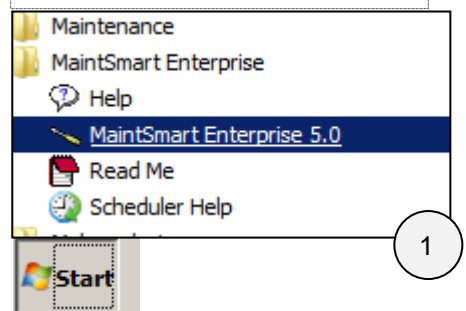
Start

2) If you are using the trial demo mode this license screen (Fig 1.2) will display and your **Unlock Code** is "**DEMO**"

3) Click **Continue** to start your demo.

Note: if you are using the demo mode, your trial will expire after 30 days.

FIGURE 1.2 – LICENSE SCREEN

MaintSmart
CMMS with Reliability Analysis

The demo version will expire in 21 days. To activate this program please contact MaintSmart: support@maintsmart.com

System ID:
35FEC07422.5.0

Unlock Code:
DEMO

Copy System ID To the Clipboard

Paste Unlock Code From the Clipboard

Unlock Software

Continue

Provide MaintSmart with the System ID above to get a valid Unlock Code

4) Select a Sample Database to link to.
   a) **Manufacturing Database**
   b) **Building Maintenance Database**

5) Press **Use Demo Database** button to start.

Note: if this is your first time using MaintSmart, it is recommended to use one of the populated Demo Databases outlined above. If you would like to use an empty database to start, please contact MaintSmart Support to help guide you through the process in a live web demonstration.

FIGURE 1.3 – TIP OF THE DAY & DATABASE SELECTION
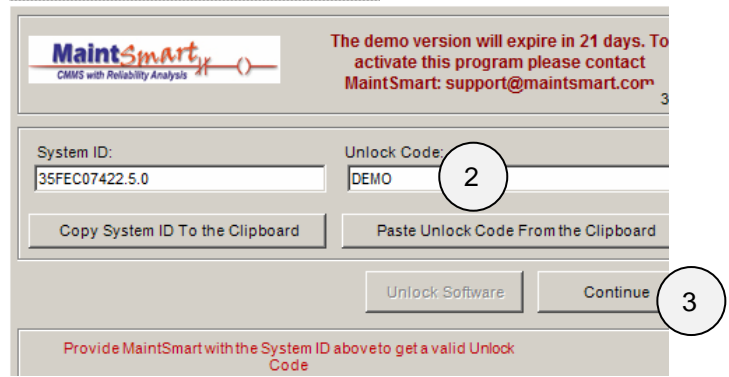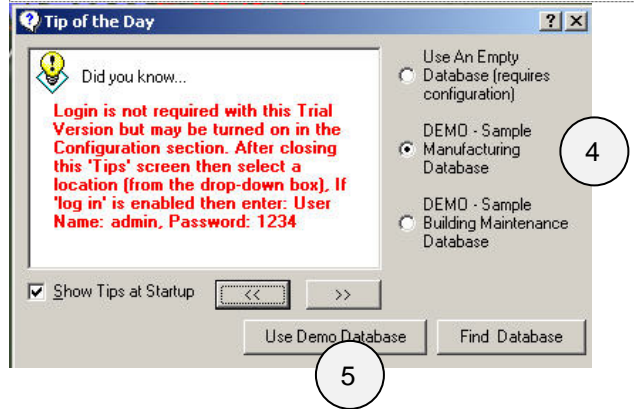
Tip of the Day

Did you know...

Login is not required with this Trial Version but may be turned on in the Configuration section. After closing this 'Tips' screen then select a location (from the drop-down box). If 'log in' is enabled then enter: User Name: admin, Password: 1234

Use An Empty Database (requires configuration)

DEMO - Sample Manufacturing Database

DEMO - Sample Building Maintenance Database

☑ Show Tips at Startup   <<   >>

Use Demo Database   Find Database

3

Login to MaintSmart - Using Automatic Login Screen with User Selected Language and Culture

Overview

This section will cover how to log into MaintSmart for the first time using our Bypass/Automatic Login screen.

1) Choose a language/locale using the drop down menu (Fig 2.0**)**. If this is left blank, the default language is English.

> **Note:** as we are using one of the demo databases, we have a variety of translations ready if we wanted to pick another language. Available translations will be in **red.**

2) Select **Administrator** button to log in as a user with administrator privileges in MaintSmart.

> **Note:** we have other available roles such as: **Power Users, Requestors, or Basic Users.** But if this is your first time testing MaintSmart we highly recommend logging in as an **Administrator** to see MaintSmart's full capabilities.
>
> Logging in as a **Power User, Requestor, or Basic User** will demonstrate the limitation of which areas these users can access in MaintSmart based on user permissions.
>
> These user roles can be set up and used as required by your organization. See the full User Manual for details.

FIGURE 2.0 – BYPASS LOGIN SCREEN in FRENCH

> **Note:** the last toolbar menu item is our lock icon (Fig 2.1). Use this icon to Login or Logout of MaintSmart. It will take you to our Login screen where you can login as a different user.
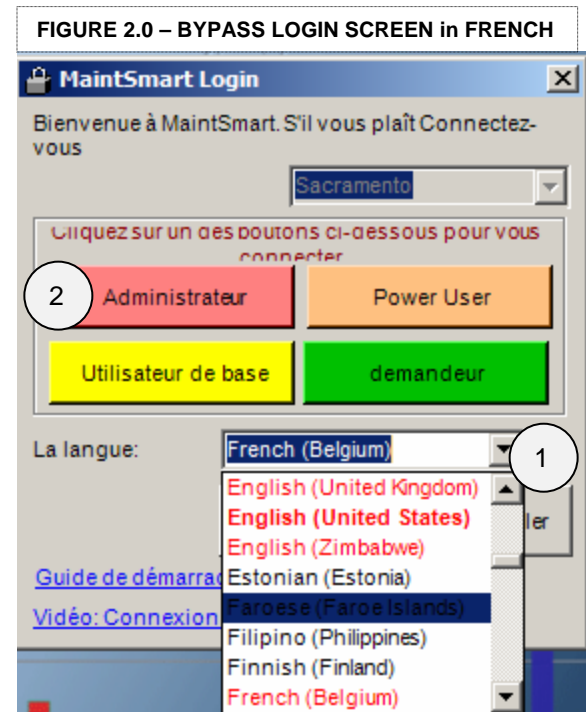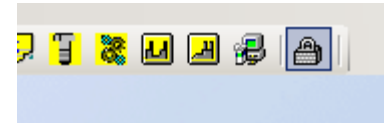
FIGURE 2.1 – LOGIN/LOGOUT LOCK ICON

Example: Logging into MaintSmart Using Automatic Login Screen with User Selected Language and Culture in Arabic

Note: in this example you can see we select to translate MaintSmart into Arabic. All menu items, buttons, and text on the screen are in the language we selected.

The data in our sample database is in English but in normal circumstances all this data would be in the language/locale you selected.

Login to MaintSmart – Using Normal Login Screen with User Selected Language and Culture

Overview
This section will cover how to log into MaintSmart for the first time using our normal login screen as you would during daily use.

1) Type in your username and password.

2) Choose a language if applicable.

3) Click **Login** to login to MaintSmart.

> **Note:** each user in MaintSmart are associated with a User Group. You can use the ones we already created (**Administrator, Requestor, Power User, Basic User**) but you can also define your own.
>
> There is no limit on how many custom user groups you can create. There is no limit to how many users you can create.

Note: the last toolbar menu item is our lock icon (Fig 2.1). Use this icon to Login or Logout of MaintSmart. It will take you to our Login screen where you can login as a different user.

FIGURE 2.1 – LOGIN/LOGOUT LOCK ICON

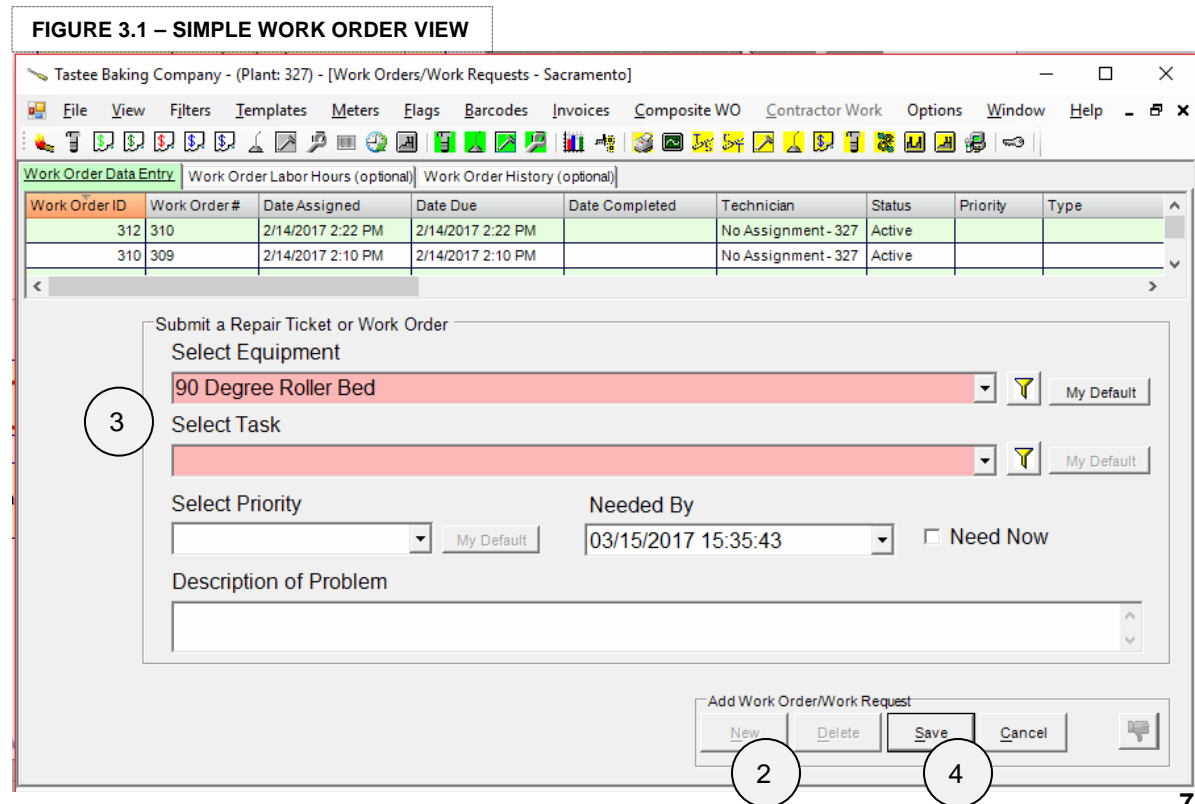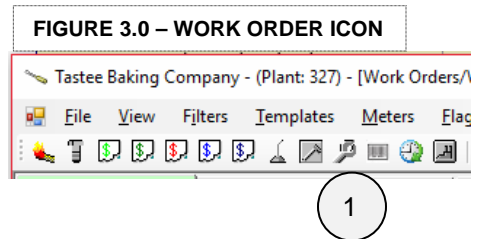# Create a Work Order – Using Simple Input View

Overview

Simple Input View is great for inexperienced users to submit a work order or repair ticket without having extensive knowledge of the program. First, we will show you how to create a work order or repair ticket using the simple view. Then, we will show you how to toggle to our normal view and we will create another work order from there.

1) Click the **wrench icon** (Fig 3.0) labelled **Work Orders** to open our Work Order data entry screen (Fig 3.1).

2) Click on the **New** button to create a new work order.

3) Select an Equipment and Task using the drop down menu.

4) Press **Save** to create your Work Order

Note: Priority, Description of Problem, Need By, Need Now are optional fields indicated by the white background. Minimum required fields have a red background.

Note: yellow funnel icons is our F**ilter** button. You can use it to filter through your **Equipment** or **Tasks**.

Note: you may have noticed a **My Default** button. Defaults can be set up per user to speed up data entry by auto-populating fields with

FIGURE 3.0 – WORK ORDER ICON
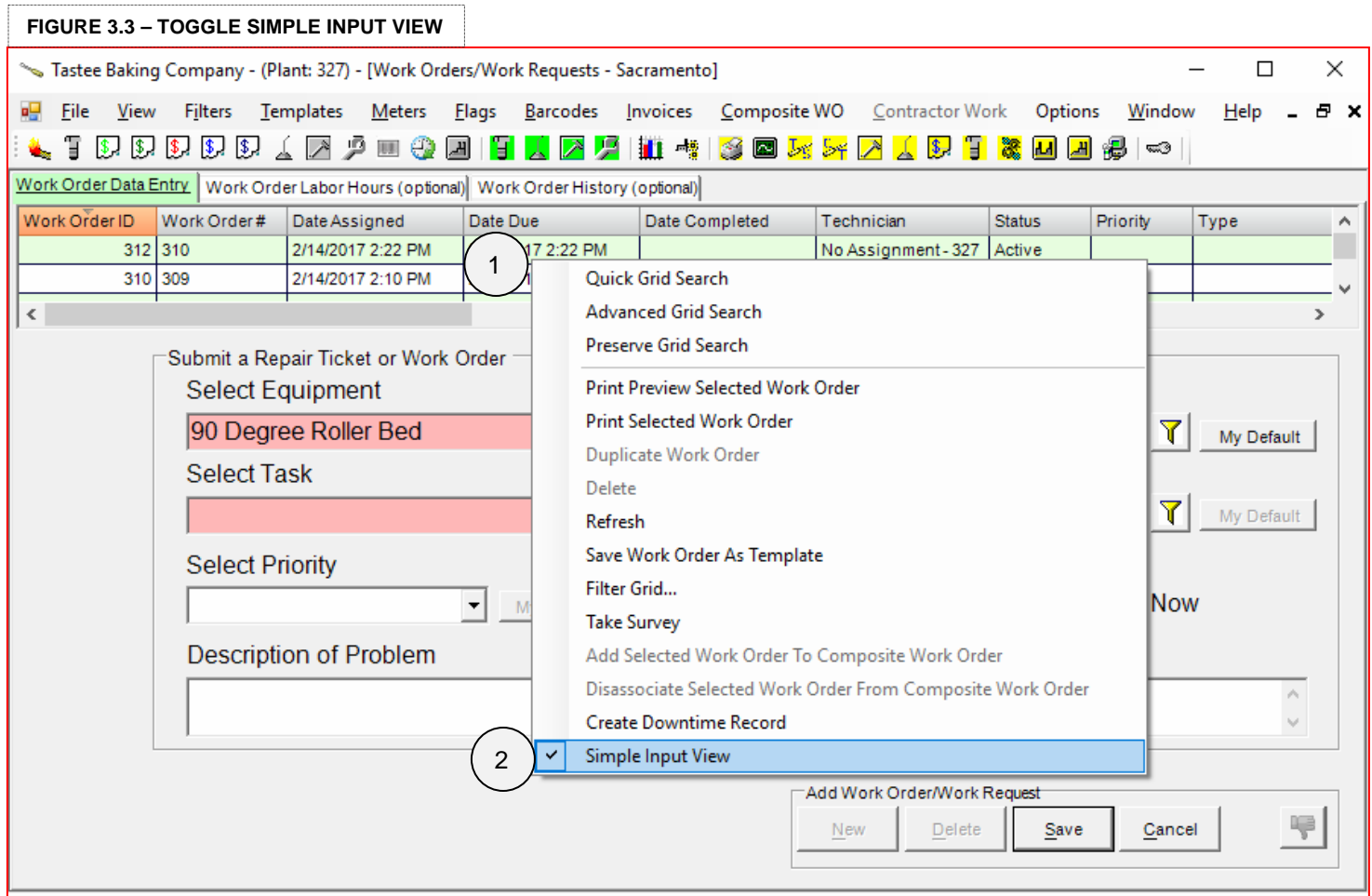

FIGURE 3.1 – SIMPLE WORK ORDER VIEW

Create a Work Order – Toggle the Input View

Overview

Now that we have discovered how easy our simple view works. Let's toggle our view to the normal work order data entry screen.

1) Right click on the data grid above our data entry section (Fig 3.3)

2) Click on **Simple Input View** to remove the checkmark to toggle to our normal view.

FIGURE 3.3 – TOGGLE SIMPLE INPUT VIEW

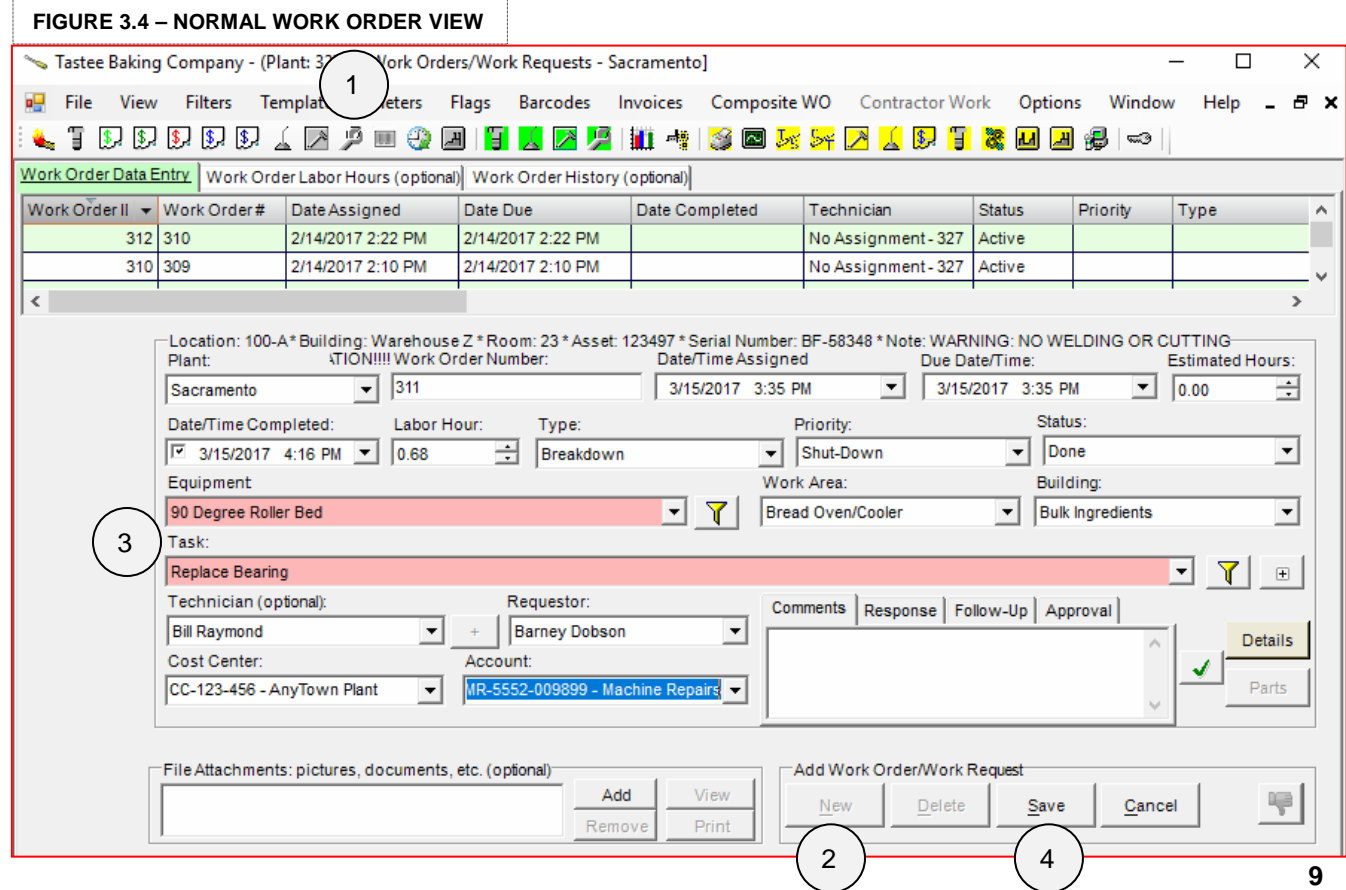# Create a Work Order – Using Normal Input View

Overview

Creating a work order in our normal input view is fundamentally the same as our simple view. The key difference is the number of optional fields you can fill in to be as descriptive as you like.

1) Click the **wrench icon** (Fig 3.0) labelled **Work Orders** to open our Work Order data entry screen (Fig 3.1).

2) Click on the **New** button to create a new work order.

3) Select an Equipment and Task using the drop down menu.

4) Press **Save** to create your Work Order

Note: just like our simple view, optional fields are in white. Minimum required fields are in red.

Note: and just like our simple input view, we have our **Filter** icon (**yellow funnel**) to help you filter your menu items.

FIGURE 3.4 – NORMAL WORK ORDER VIEW

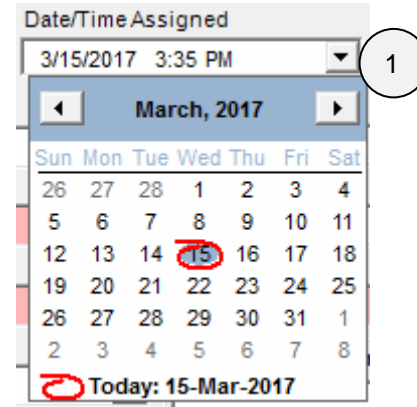# Create a Detailed Work Order – Looking at our Optional fields

Overview
We're going to take some time to go over some of our optional fields which you can use in our normal work order view.

1) Date fields (Fig 3.5) **:** Using the drop down menu on any date fields will open up a calendar for you to select your date. Optionally, you can also type in your date if you wish.
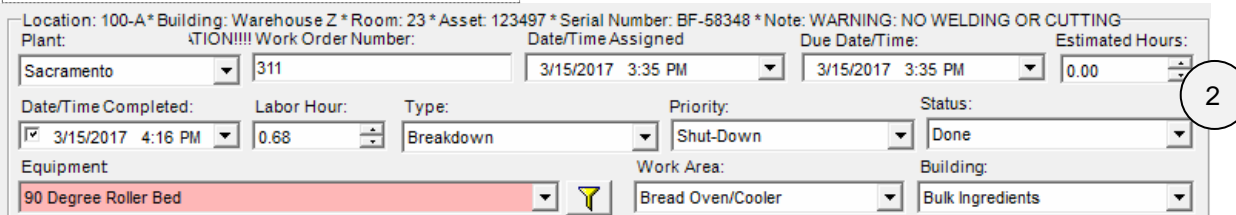
2) Types, Priority, Status, etc. (Fig 3.6) **:** use the drop down menus to select an item. These items can be configured to meet your requirements.

FIGURE 3.5 – DATE FIELD

Date/Time Assigned

3/15/2017 3:35 PM   ▼   ①

◄   **March, 2017**   ►

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

↺ Today: 15-Mar-2017

FIGURE 3.6 – OPTIONAL DROP DOWN FIELDS

Location: 100-A * Building: Warehouse Z * Room: 23 * Asset: 123497 * Serial Number: BF-58348 * Note: WARNING: NO WELDING OR CUTTING

Plant:	...TION!!!! Work Order Number:	Date/Time Assigned	Due Date/Time:	Estimated Hours:
Sacramento ▼	311	3/15/2017 3:35 PM ▼	3/15/2017 3:35 PM ▼	0.00

Date/Time Completed:	Labor Hour:	Type:	Priority:	Status:
☑ 3/15/2017 4:16 PM ▼	0.68	Breakdown ▼	Shut-Down ▼	Done ▼

Equipment

| 90 Degree Roller Bed ▼ 🝙 | Work Area: Bread Oven/Cooler ▼ | Building: Bulk Ingredients ▼ |

②

3) Technicians (Fig 3.7) **:** select a technician for your work order.

4) Requestor (Fig 3.7) **:** the person who requests the work order or ticket. This is useful later when you add multiple maintenance technicians on a work order and schedule their time automatically.

5) Cost Center / Account (Fig 3.7) **:** select your accounts if any costs were incurred. These can be locked by an **Administrator** if needed.

FIGURE 3.7 – MORE OPTIONAL DROP DOWN FIELDS

Technician (optional):	Requestor:
③ Bill Raymond ▼ +	Barney Dobson ▼ ④
Cost Center:	Account:
CC-123-456 - AnyTown Plant ▼	MR-5552-009899 - Machine Repairs ▼

⑤

Create a Detailed Work Order – Optional fields (cont'd)

Overview
We're just going to go over the last few optional fields available under your normal work order view.

1) Comments (Fig 3.8) : use this field for short additional texts or instructions. (255 character limit)

2) Details (Fig 3.9) **:** clicking on this button opens a new detail prompt. This area can hold up to 2 GB of text instructions you may need. Press OK to save.
To ensure this text displays on your work order report select "Detailed" work order reports as your format. More on that later.

> **Note:** in the Details screen you can go to File/Save to save your comments as a Rich Text format.

3) File Attachments (Fig 4.0) **:** Add unlimited amount of files to any work order that is supported by your computer. You can view these files or print them.

FIGURE 3.8 - COMMENTS

FIGURE 3.9 - DETAILS

FIGURE 4.0 – FILE ATTACHMENTS

Edit, Delete, or Print A Work Order

Overview
We're going to go over how to edit, delete, or print your work order. We will step through shortcuts via right clicking and using a context-sensitive menu or by using the menu bar for additional features.
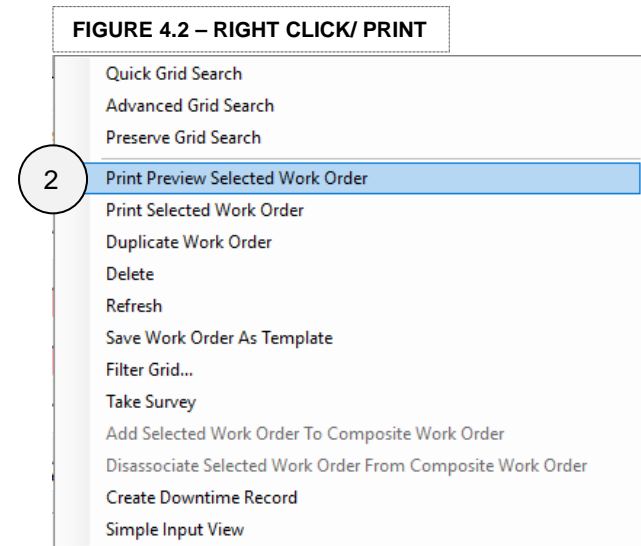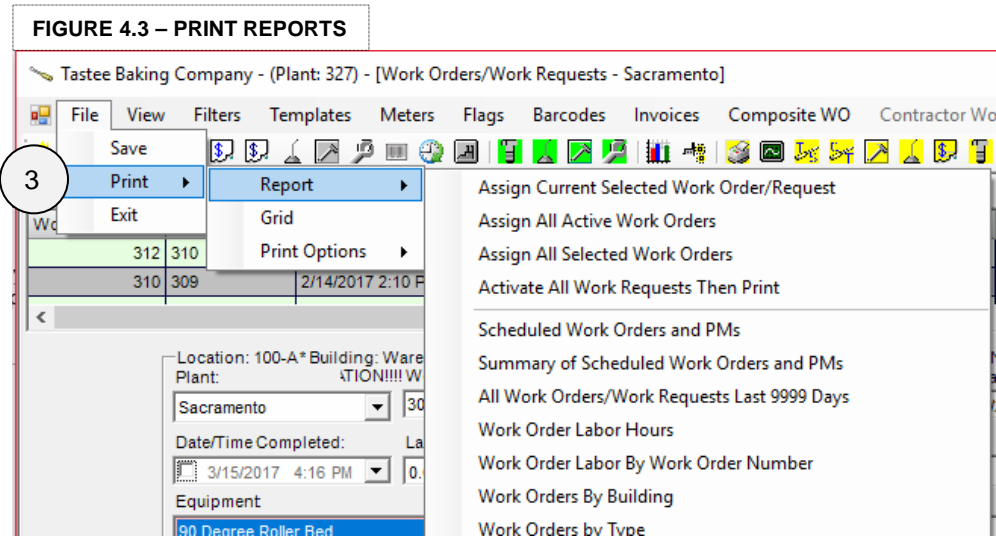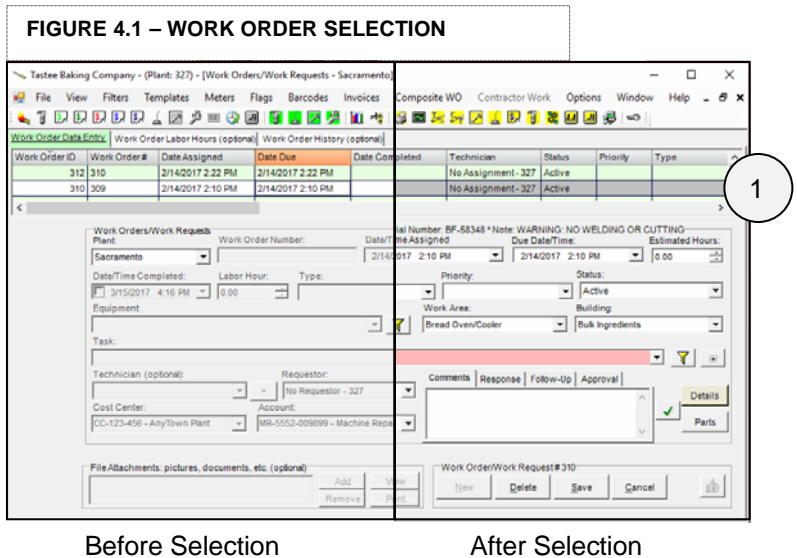
Editing a Work Order (Fig 4.1)
1) Select any work order from the grid and entry section becomes active for editing.

Right Click/ Print, Preview, Delete, and Additional Features (Fig 4.2)
2) Right clicking on our grid will open a context-sensitive menu through which you can quickly **Print**, **Preview**, or **Delete** to list some features.

Menu Bar/ File/ Print/ Report / Additional features (Fig 4.3)
3) Under **Report** you can select a variety of features like selecting your work order format, printing all selected work orders, or summary reports for your needs.

FIGURE 4.1 – WORK ORDER SELECTION

Before Selection   After Selection

FIGURE 4.3 – PRINT REPORTS

FIGURE 4.2 – RIGHT CLICK/ PRINT

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Printing Work Orders – Selecting Formats (advanced)

Overview

MaintSmart offers many print formats for your work orders. These formats
can display basic information, additional details, or if parts are being used.
Choose one that is suitable for your needs.

1) Menu bar/ Options/ Work Order Formats/ … (Fig 4.4)
- Work Order w/ Parts Used
- Work Order w/ Details and Parts (Fig 4.5)
- Classic Formats (..includes 3 more formats)
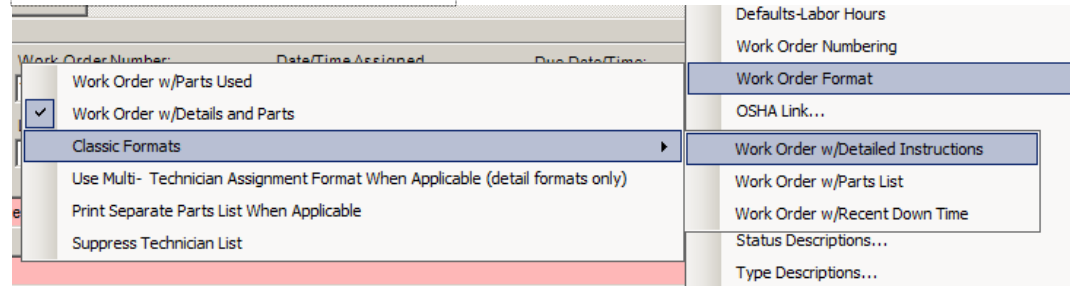
FIGURE 4.4 – WORK ORDER FORMATS

FIGURE 4.5 – PREVIEW

Saving Work Orders to Excel, HTML, & Other Export Options (advanced)

Overview
In addition to printing out work orders, MaintSmart offers other export information.

Export the Work Order Grid (Fig 4.6)
1) Under work orders go to **Menu bar/ File/Save …** select the file type you want to save your grid as.

Export a Work Order
1) Select a work order
2) Right click/ **Assignment Current Selected Work Order Request**
3) Wait for a new window prompt
4) Click **Export**
5) Select the format you want to export to, whether you want to print, or whether you want to email this work order.

> **Note:** see the full User Guide for full instructions on how to set up email configuration in MaintSmart.

FIGURE 4.6 – EXPORT AS HTML

FIGURE 4.7 – EXPORT & EMAIL

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Work Order Templates (advanced)

Overview
Speed up work order creation by using our Work Order Templates. These templates is a copy of an existing work order which you can issue many times manually or automatically.

Create Manually (Fig 4.8)
1) Menu bar/ Templates/ Create Work Order From Template
2) Select your template from the list
3) Press **Create WO**

Create Automatically
• Via Print Scheduler
• Via Meter Readings

> **Note:** to learn more about our automated **Print Scheduler** and how our **Meter Readings** work visit our website and watch our videos online or contact us for a demonstration.

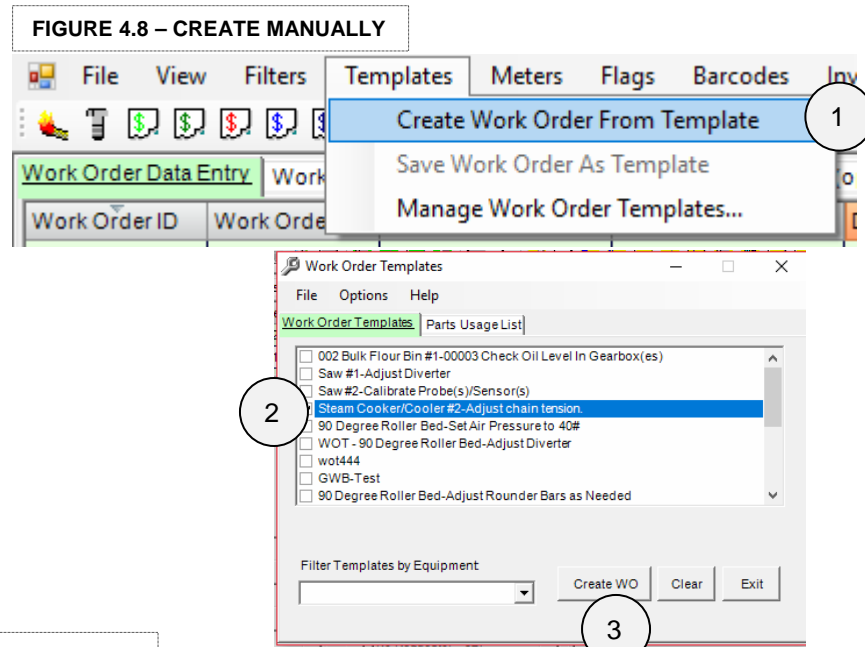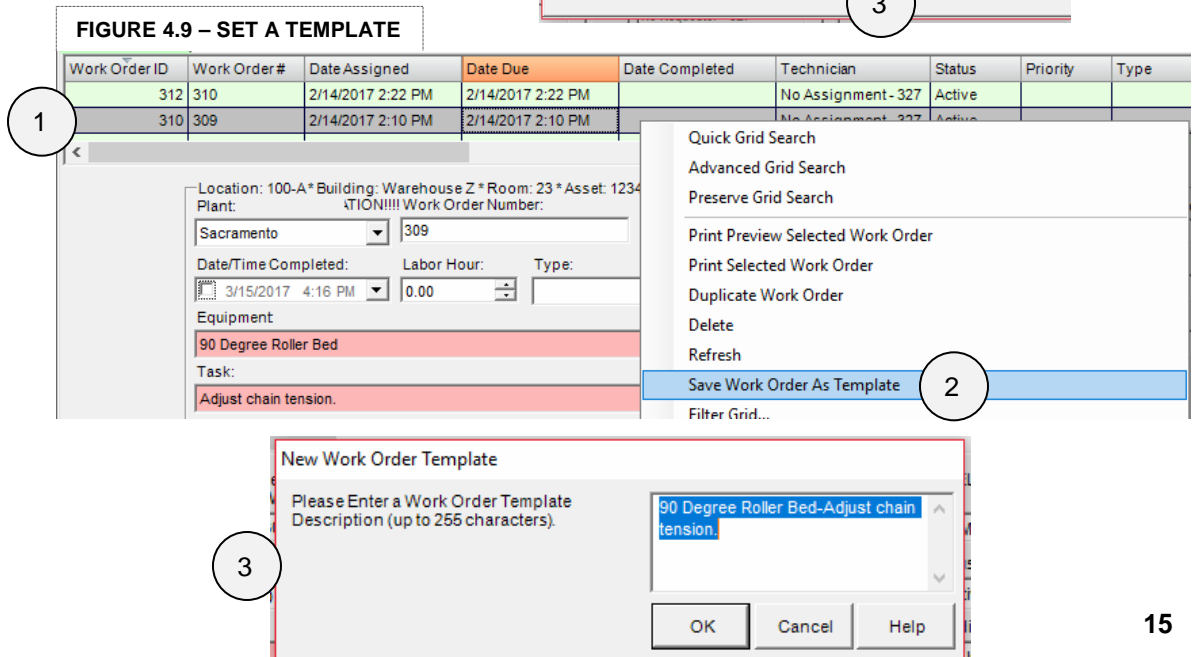**FIGURE 4.8 – CREATE MANUALLY**

How to Set A Template (Fig 4.9)
1) Select an existing work order from the grid
2) Right-click / **Save Work Order as Template**
3) Type in a unique name for your template

FIGURE 4.9 – SET A TEMPLATE

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Work Order Templates – Meters (advanced)

Overview

Automatically create work orders using templates and linking to a meter. Meters are a user-defined values that increment from any source. A meter could be a saw cut counter. Or a hour meter on an equipment item.

These meters can be entered manually into MaintSmart thorough our **Meters** module. Alternatively, link meters using an OPC data item. OPC data items are used in many common PLC and HMI network programs like RSLinx or Wonderware.

Linking to a PLC address will create work orders based on the values read from actual equipment items.

Note: this advanced topic is covered in detail in our full User Guide.

FIGURE 5.0 – METERS OPTIONS
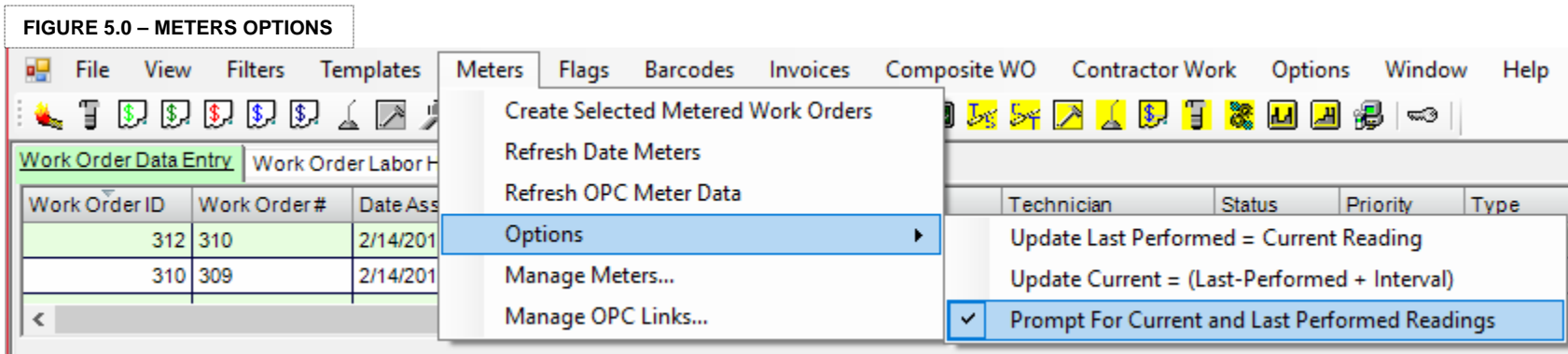
What Are PMs And How Do They Differ From Work Orders?

Overview

Preventive Maintenance tasks (PMs) are routine tasks controlled by number of days as intervals. These allow for tasks to be completed and validated quickly without issuing a work order.

Using a sample PM list report (Fig 5.1) we can go over the basic features of PMs.

PMs

1) Task Description

A descriptive header is often enough to describe a small task completely.

2) Interval

The controlling factor for when a task is scheduled to repeat once completed. Start date vs. due date = interval days.

3) Comments/ Details

Like work orders PMs can include comments and details which can be printed for your technicians.

4) Parts Used

Just like work orders PMs can also automate parts usage once it is fully set up.

FIGURE 5.1 – SAMPLE PM LIST REPORT

David Hackworth   Employee Number: 5306

Yeast Refrigeration Compressor #1
S/N: Asset:
Location: Building:

Check and Oil Chains   1   7   6/13/2003   6/20/2003

Notes:

Replace Refrigeration Particulate Filters and Service   7   1/22/2004   1/29/2004
King Valve
Step 1 Check the Refrigerant for Acid
 - If the compressor has burned out, change the compressor, refrigerant, and oil. Also, change the filter driers (adding a suction-line filter is recommended if one is not already installed). Go to step 2.
 - If the compressor has not burned out, use a Mainstream QwikCheck® to determine if the refrigerant is acidic.
 q If the refrigerant tests highly acidic (QwikCheck indicator turns red), change the refrigerant and oil. Also, change the filter-driers (adding a suction-line filter drier is recommended if one is not already installed). Go to step 2.
 q If the refrigerant tests mildly acidic (QwikCheck indicator turns orange), you need not change the refrigerant or the oil, but you should change the filter-driers. Go to step 2.
 q If the refrigerant does not test acidic (QwikCheck indicator stays yellow) skip all subsequent steps, no acid treatment is necessary.
Step 2 Determine the Size of the Filter-Drier in the System
 - Determine the recommended filter-drier for the system. If the equipment manufacturer does not make any specific recommendations, a

Notes:

Part Description	Part Number	Quantity Needed	Available	Part Location
☐ Part	45-99	2 feet	39	U7y

🛠 Closing PMs

Overview

Let's look over our Preventative Maintenance (PM) validation screen in detail.

Preventive Maintenance Data Entry

1) Click on **Preventive Maintenance** (oil can icon) on your menu bar
2) When tasks are complete, select your PM tasks by either:
   - Holding down **CTRL** and left-clicking to select individual tasks
   - Holding down **SHIFT** and left-click to block select PM tasks

3) Select **Who Completed** the tasks
4) Enter number of **Hours**
5) Press **Completed** to close your PMs

> **Note:** once you complete your PMs. The start date and due date will automatically refresh based on the intervals of each task.
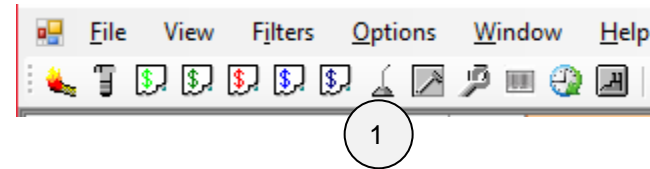
FIGURE 5.2 – PREVENTIVE MAINTENANCE ICON

FIGURE 5.3 – PM GRID SELECTION

Equipment	Late	Task
90 Degree Roller Bed	✓	Adjust Diverter
90 Degree Roller Bed	✓	Adjust Rounder Bars as Needed
90 Degree Roller Bed	✓	Calibrate Gauge(s)
90 Degree Roller Bed	✓	Check Air Hoses/Fittings For Leaks
90 Degree Roller Bed	✓	Check Blower Oil Level

FIGURE 5.4 – PM DATA ENTRY

Equipment	Late	Task	Interval	Start Date	Due Date
90 Degree Roller Bed	✓	Adjust Diverter	10	3/30/2011	4/9/2011
90 Degree Roller Bed	✓	Adjust Rounder Bars as Needed	75	8/17/2012	10/31/2012
90 Degree Roller Bed	✓	Calibrate Gauge(s)	10	3/30/2011	4/9/2011
90 Degree Roller Bed	✓	Check Air Hoses/Fittings For Leaks	7	8/17/2012	8/24/2012
90 Degree Roller Bed	✓	Check Blower Oil Level	30	3/30/2011	4/29/2011

Validate Selected PM Tasks ~ (991 records Loaded in (seconds): 0.2

Plant: Sacramento

Completed By: Bill Raymond — Keep Default Assignment

Completed: 3/15/2017 — Use Due Date

Hours: 1.50 — Use Average

Task Completion Comments (optional 255 characters):

Data Update Mode ('Close Completions' = Default)
Close Completions — Suggest Based on Skills (single row selection)

Validate Selected PM Tasks (optionally use parts and/or add details)
Details | Use Parts | Completed | Cancel

Print PMs (basic)

Overview
We discovered how to use the PM data entry screen and now we need to print our PMs. You can do this in two different ways.

Print PM Plan (Fig 5.4)
1) Go to your **Menu bar/ File/ Print/ Assign PM Lists / PM List by PM Plan**

Select from the Grid (Fig 5.5)
1) Select a block of PMs on the grid
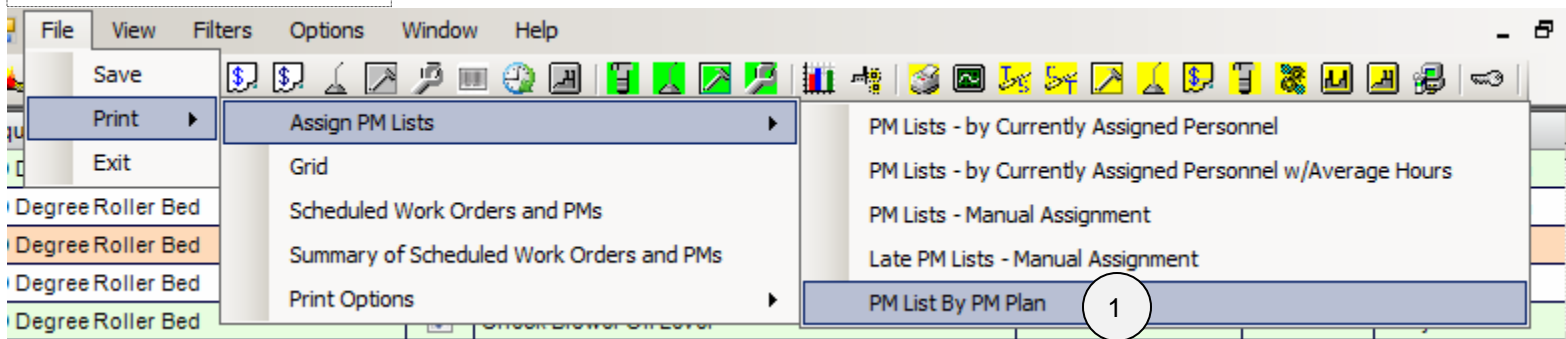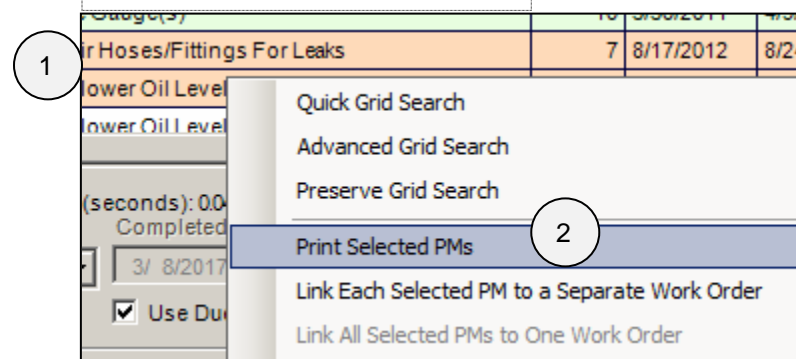2) Right click and select **Print Selected PMs**

FIGURE 5.4 – PRINT PM BY PLAN

FIGURE 5.5 – PRINT PM BY SELECTION

🔧 Filtering PMs (advanced)

Overview

To speed up your work flow you can filter the PMs on your PM list by using the filters provided in the PM data entry screen or you can use our advanced filter and creating custom filter templates.

Filter Using the Drop Down Menus on the PM Data Entry Screen (Fig 5.6)

1) Using any one of the drop down menus you can filter the PMs on your grid.

Advanced Filtering & Save Custom Filter (Fig 5.7)

1) Right click on the grid and select **Filter Grid** from the context menu

2) Set your **Filter Grid** parameters:
- **Which Column**
- **Operator**
- **Value**
- **Where Due Date is From and To**

3) **Apply** your filter
4) Assign a **name** to your filter
5) Press **Save**

Using a Custom Filter (Fig 5.8)

1) Go to the **Menu Bar/ Filters/ …** will display a list of all your custom filters.

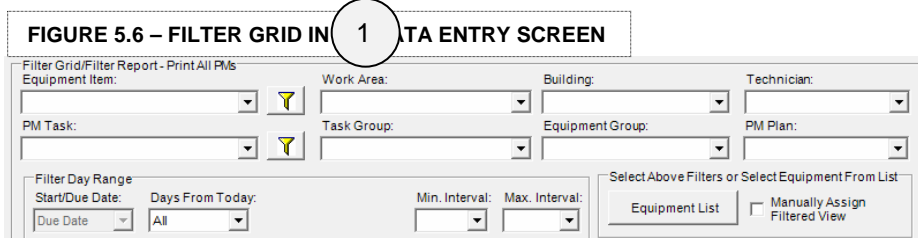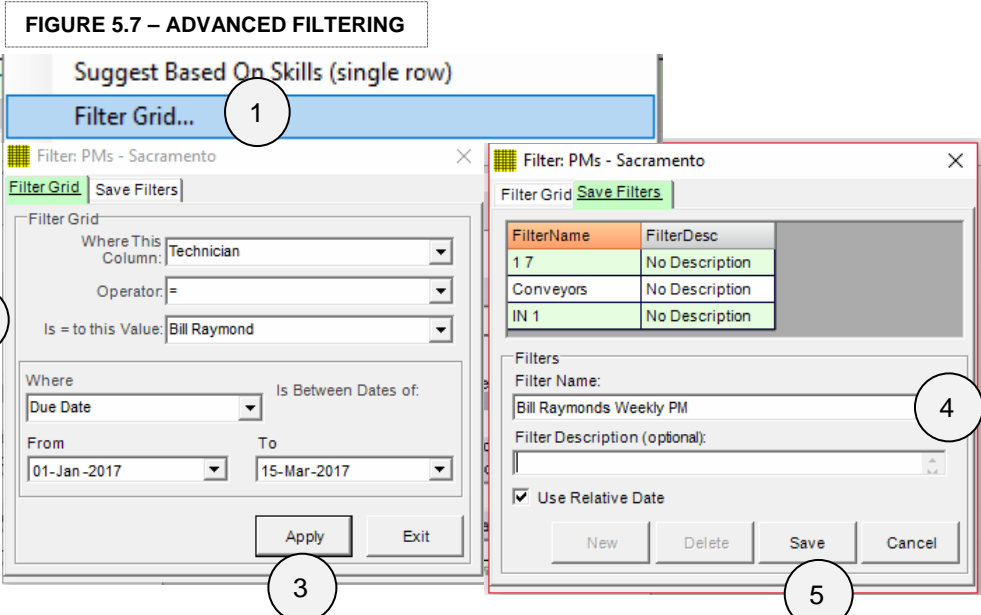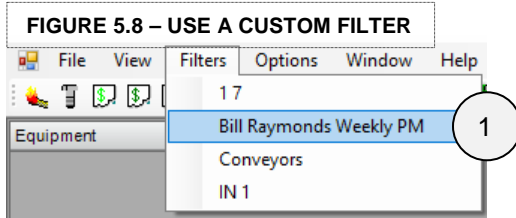FIGURE 5.6 – FILTER GRID IN DATA ENTRY SCREEN

FIGURE 5.7 – ADVANCED FILTERING

FIGURE 5.8 – USE A CUSTOM FILTER

⛏ PMs Options (advanced)

Overview
Just like work orders PM print reports have a variety of different formats to suit your needs (Fig 5.9) Using the filters and advanced filters in the previous page makes it a snap to print your PM list.

PM List Formats (Fig 6.0)
1) **Menu bar/ Options / PM List Formats/ …** select your formats.

Print from PM List (Fig 6.1)
1) **Menu bar/ File/ Print/ Assign PM Lists/ PM List by Filtered View..** Once you have your filter applied from the previous example, you can use this option to print your PM list.
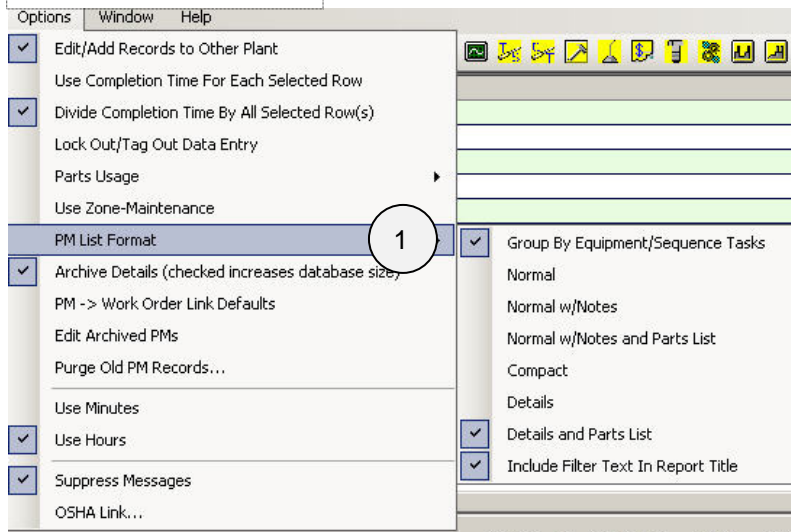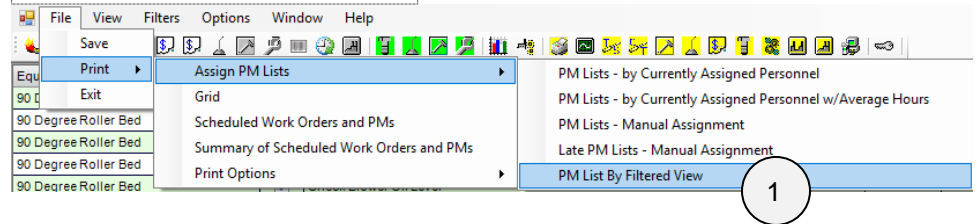
FIGURE 5.9 – PM LIST FORMATS

FIGURE 6.0 – PM OPTIONS

FIGURE 6.1 – PRINT FROM PM LIST

More Resources, Videos, Documents, Trial Software

MaintSmart User Manual (200+ pages):

http://www.maintsmart.com/cmms-software/maintsmart-cmms-software-user-guide.pdf

MaintSmart Purchasing/Inventory Manual:

http://www.maintsmart.com/cmms-software/maintsmart-cmms-software-purchasing-guide.pdf

Print/Email Scheduler Manual: http://www.maintsmart.com/cmms-software/maintsmart-cmms-software-print-scheduler-guide.pdf

Free Training:
http://cmms-university.com/
http://www.maintsmart.com/cmms-software-training/

Manuals and Documents:
http://www.maintsmart.com/free-cmms-software/

Full CMMS Software Program (MaintSmart 5.0):
http://www.maintsmartftp.com/MaintSmartEnterprise50.exe

MaintSmart Web Requester Module:
http://www.cmms-software.net/web-based-cmms-software/

Videos explaining PM task lists and Task packages:
http://cmms-university.com/preventative-maintenance-software/

Download Sample Reports and Brochures:
http://www.maintsmart.com/cmms/free-cmms-demo-package.pdf

Overall Equipment Effectiveness (OEE)
http://www.maintsmart.com/cmms/free-cmms-software-oee.pdf
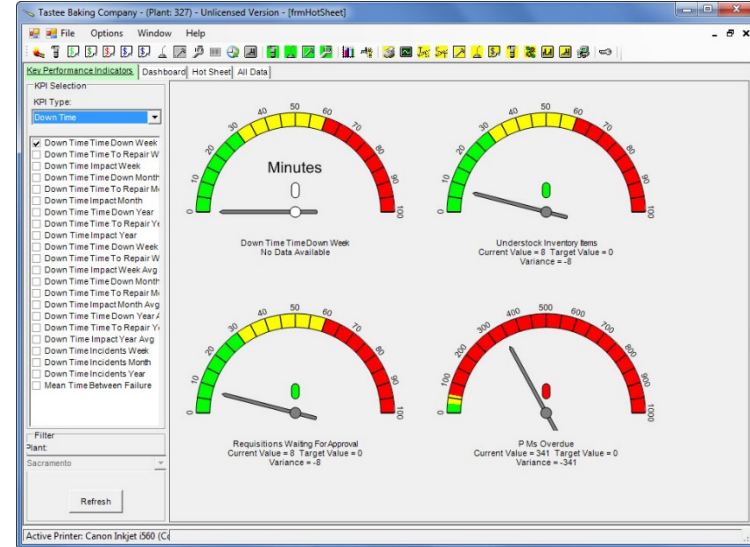
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Testimonials:
http://www.maintsmart.com/cmms-program/

Benefits of CMMS Software:
http://www.cmms-software.net/cmms/

CMMS Software Comparison:
http://www.maintsmart.com/cmms-software-comparison/