

MaintSmart 4.0 Release Notes

MaintSmart Software, Inc.

MaintSmart 4.0 was a complete rewrite of the nearly one half million lines of code contained in the program. By rewriting the program in the Microsoft .NET programming language we are now able to leverage many new high technology components. Over the next 1-2 years several powerful new upgrades will emerge as a result of this major undertaking. As always all development of MaintSmart is handled in house in our Oregon and California development centers.

Below is a list of some of the new features in MaintSmart:

General Additions and Enhancements

- Conversion of MaintSmart to .NET 2.0 application programming language from Visual Basic 6. NOTE MaintSmart is still a Windows application not a web-based product although we do offer a web-based work request component.
- Exporting of all reports to the following formats: Adobe Acrobat, Rich Text, HTML 4, Excel, Comma Separated, Text, MS Word, XML.
- Export all reports to the following destinations: file, email or printer.
- Ability to simply embed the report text into an email without using an attachment.
- Enhanced search capability for selected data grids (several were added to existing count). This enhanced grid search provide to the standard quick single text item search or for an enhanced two word or phrase search that uses a OR or AND operator.
- Engineer may be linked to user login. By doing this the screen may be set (not all at this point) to display only items referenced to that engineer (for example this engineer only see work orders assigned to him).
- Grid colors and settings (including font and font size) may be set by each user.
- Alternate row coloring makes it easier to focus on one line in data grid.
- Required field color may be set (previously was fixed at yellow)
- New HTML help system
- Fully compatible with Windows XP, Windows 7 and Vista. Supports SQL Server 2000, 2005 and 2008 (32 or 64 bit).
- Speed optimization options may be applied to entire program from one menu item.
- Details button is highlighted on record selection if record contains linked "Details".

Administration

- May impersonate user settings and copy these settings to one or more additional users.
- Several more permissions added to permission database
- Allow Requestors to edit work order priority.
- Email configuration provides a way for administrator to set up email capability using Microsoft mailing functions.
- Speed optimization screen lets you choose to dramatically increase the speed of screen loading and other functions.

Print/Email Scheduler and Printing

- **Ability to set up automatic email jobs and/or print jobs. Items are saved as a document of user choice then added as a file attachment to the email then automatically sent based upon a user-defined schedule.**
- Ability to embed into email the contents (text only) of any print scheduled report (PM lists, work orders, etc.)
- Added CC List, BCC List, delivery notification and email priority fields to automatic report emailing capability.
- New printing component provides a print preview for any data grid. Pages may be formatted and flowed to user preferences.
- Print preview has capability to save data grid in these formats: HTML, Adobe Acrobat, Rich Text, Excel, .jpg, .tiff and many more.
- New print/email scheduler schedule interval "Every () Days". This provides a way to trigger a print/email job based upon day count interval.

Equipment

- Equipment tree view may be sorted by equipment sequence.
- Loading speed enhanced.
- Equipment tree view screen may be easily proportioned between tree view and data grid by dragging separator bar.
- Equipment list and Equipment Details data grid made searchable.
- Equipment tree view has very flexible sorting options added including sort by equipment sequence. This provides a way to display the equipment in the actual physical order.
- Flexible pane sizing added to equipment tree.

Inventory

- Added fields to inventory database: Reorder Level, Reorder Quantity, Lead Time, Active.
- Added six (6) open user configurable text fields that can be up to 255 characters each. These fields may be names by the user as needed. The Active field give user a way to deactivate inventory no longer in use without deleting the inventory history.

- Removed hard linking of part group numbering from part ID field.
- Added a way to easily and directly link parts to physical equipment items. This is in addition to the part groups that are already in place but will not conflict with part groups. This gives the user the ability to create a complete or partial parts for any or all equipment.
- Added parts list reporting.
- Hot sheet displays (and flags) below stock items that have already been ordered. This differentiates item below stock that are on order vs. items that have yet to be ordered.

Preventive Maintenance/Work Orders

- Convert a PM to an active work order with very little effort from the PM screen
- Embed many PMs into one work order or create separate work orders for each PM
- Close a PM linked work order and MaintSmart closes all linked PMs automatically
- User defined column sorting and width settings enhanced
- Ability to edit closed PMs.
- Work order Status and Priority enhanced.

Hot sheet:

- Added ability to generate requisitions based upon not only minimum stock but also new inventory field "Reorder Level". Either of these triggers also has a threshold variable that can trigger either field either above or below the triggering field. For example reorder level may be 100 however you could set the variable to trigger at 99 by setting the variable to -1
- Added capability for requisition reorder quantity to be determined by either (Minimum Stock - Quantity on Hand), (Maximum Stock - Quantity on Hand) or Reorder Quantity (reorder quantity is a new field added in MS4)
- Added Technician as a hot sheet node for preventive maintenance work due, late or coming due. This provides an easy way to see engineers and what is late or otherwise due and easily generate a PM list for this engineer.
- Added capability to generate requisitions for all items that meet requisition criteria.
- Previously ordered parts that are either on a requisition or a PO (not yet received) are indicated on hot sheet to avoid multiple ordering of same part.

Other:

- Down time records attach the logged in user's name to the record when it is created. This enhances accountability.
- Down time "Type" field added.
- "Details" button changes color to indicate if a record already has details attached to it.
- Scheduler runs much faster and provides a way to automatically schedule work orders when created.

This is many, but not all of the enhancements and features added to MaintSmart 4.0. [This year we expect extensive further development of MaintSmart as we take advantage of the new programming platform available to us.](#)

Email | Printer | File

All Email Addresses: To: CC/BCC:

Bill Wilson ~ bwilson@msn.com Charlie Huston ~ c.hestor

Export any report (work orders, PMs, analysis report, anything) by emailing, printing and saving as any of many file types including Excel, MS Word, Adobe Acrobat, etc.

To >> CC >> << + BCC <<

Priority: Subject: Body:

Normal Work Order 282 Use Report Title PMs list

Delivery Notification: Attachment Format: Attachment Name:

None Adobe Acrobat (.pdf) Work_Order_282 Us Tit

Log Message Information Append File Text To Email Body

Insert User Name Into Email Body Insert User Name Into Email Subject Delete Attachment Send

You can even embed the report text into the email body.

Plant: Sacramento Send

Work Orders Active:1

- Priority
 - Urgent Active
- Inventory
 - Vendor
 - Bob the Builder Understock:4**
 - H777 Coil Quantity:16 Min Stock:20
 - 65757 ATQR 15, MIDGET TIME DELAY TRANSFORMER FUSE, 15
 - 125 1/4-20 bolts Quantity:0 Min Stock:1
 - 22222 BBBB Quantity:1 PO/Requisition:9 (Christian Thomas)
 - Delta Rubber Understock:1
 - Freddie Vendor Understock:1

Hot sheet indicates if below stock item is already on a requisition or a PO. It also give req/PO number and who ordered the item. This prevents double-ordering.

on Compressor #1	<input checked="" type="checkbox"/>	Check Air Solonoid
on Compressor #1	<input checked="" type="checkbox"/>	Check and Lubricate Bearings
on Compressor #1	<input checked="" type="checkbox"/>	Check And Oil Chain
on Compressor #1	<input checked="" type="checkbox"/>	Check Blower Oil Lev
on Compressor #1	<input checked="" type="checkbox"/>	Check Cylinder Clevis
on Compressor #1	<input checked="" type="checkbox"/>	Check Drive Chain Ali

Completed By: Charlie Huston 5/16/2011

Mode ('Close Completions' = Default)

Link and embed PM tasks into a work order

Quick Grid Search
Advanced Grid Search
Preserve Grid Search
Print Selected PMs
Link Each Selected PM to a Seperate Work Order
Link All Selected PMs to One Work Order
Suggest Based On Skills (single row)

Work Order: 282(282)

Printed By: Christian Thomas Print Date: 5/16/2011

Priority: Urgent

Type: PM

Status: Active

Requested By: No Requestor - 327

Requestor Office:

Date Assigned: 5/16/2011 9:16:21AM Estimated Hours: 0.00

Date Due: 5/16/2011 9:16:21AM

Technician: Charlie Huston

Equipment: Yeast Refrigeration Compressor #1

Plant: Sacramento (327)

Line: Bulk Ingredients

Location: No Area Assignment - 327

Location: Roof Asset Number: 21347

Building: A Serial Number: 6734569379

Equipment Info:

Task: Check Cylinder Clevis and Pin(s)

Instructions:

*Check all safeties.
Replace guards promptly
Remove safety hazards and document.
Lock out / tag out as needed.*

Detailed Instructions:

_____ [418] Yeast Refrigeration Compressor#1 ~ Check Cylinder Clevis and Pin(s) (7) 4/6/2011

_____ [25] Yeast Refrigeration Compressor#1 ~ Check and Lubricate Bearings (7) 4/6/2011

_____ [6] Yeast Refrigeration Compressor#1 ~ Check And Oil Chain (30) 4/29/2011

Close the work order and the linked PMs also close.

Inventory

Use Default Reorder Level

Use Minimum Stock Level to Reorder

Filter Items

Understock (+/-):

Reorder Quantity

To Minimum Stock

Reorder Quantity

To Minimum Stock

To Maximum Stock

Hot Sheet

Show

Display Category

Part

Part Group

Hot Sheet: use "Reorder Level" or "Minimum Stock" as trigger to reorder. Default quantity may be either: bring to minimum or maximum stock or order to new field: "Reorder Quantity".

Vendors and Contractors

Plant (default): Sacramento

Vendor/Contractor Name: Bob the Builder

Vendor Number: V0934839

Contact: Bob Q. Builder

Title:

Address: 1117 Ferguson Ave.

City: Coos Bay

State/Province: OR

Postal Code: 97420

Country: USA

Category: Vendor

A/P Number: AP-8712384

Phone: 1-541-366-0987

Cell Phone: 1-541-366-0987

FAX: 1-541-366-0987

Email: bob@builder.com

Web Site: http://www.bobthebuilder.com

Default Tax Rate: 0.0000

Tax ID:

Vendor Internal ID: 20

Terms:

Notes:

This Vendor Is Shared By All Plant

Active Vendor

Several new fields added to Vendors: Web Site, Email Address, Category, and more

Inventory Set Up

Inventory | Extra Data (optional) | Equipment Parts List (optional)

Plant: Sacramento

Item Type: Inventory

Part Group: Air Compressor

Preferred Vendor: Bob the Builder

Location: JBU

Part Number: 1747-KTXA

Part Description: Allen Bradley Comm Card

Quantity: 1

Units: EA

Unit Cost: \$201.08

Minimum Stock: 1

Maximum Stock: 8

Re-Order Quantity: 4

Re-Order Level: 1

Lead Time (days): 1

Date Acquired: 10/30/2010

Identifier:

Notes:

Active

New fields in inventory.

Inventory Parts File Attachments (optional pictures, diagrams, prints, notes, etc.)

Inventory Set Up

Add View

Remove Print

New Delete Save Cancel

Inventory Set Up

Inventory | Extra Data (optional) | Equipment Parts List (optional)

Internal ID Number: 9

Part Number: 1747-KTXA

Part Description: Allen Bradley Comm Card

Manufacturers Name: AB Electrical

OEM Part Number: 34905903457890HHH

Internal Part ID: 489573947593485

Package Type: #100 Carton

Alt Vendor 1: Consolidated Electrical Supply

Alt Vendor 2: Acme Electrical

Six new user-defined fields added to inventory.

Inventory Parts File Attachments (optional pictures, diagrams, prints, notes, etc.)

Inventory Set Up

Add View