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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

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)

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.

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.
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.

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.
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.
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 Filter 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
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](image)
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.
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.

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.
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.
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.
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.
Work Order Templates (advanced)

Overview
Speed up work order creation by using our Work Order Templates. These templates are 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.

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
**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 through 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.
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.
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

FIGURE 5.4 – PM DATA ENTRY
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.
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.
More Resources, Videos, Documents, Trial Software

MaintSmart User Manual (200+ pages):

MaintSmart Purchasing/Inventory Manual:


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:

Overall Equipment Effectiveness (OEE)

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