Productivity

PMTracker:

Preventive Maintenance Tracker

Powerful Tools for Better Performance

SOFTROL

Contents

Introduction

PMTracker is a comprehensive system for the management of your plant's equipment assets:
- **equipment**: equipment inventory, maintenance schedules, run times, manufactures, and distributors;
- **work orders**: preventative maintenance, informational, and breakdown; and
- **parts inventory**: quantities, order requests, requisitions, and suppliers.

The system consists of a software package used on a networked PC and a distributed application. This PC allows the plant supervisors to manage all aspects of preventative maintenance, repairs, maintenance personnel, parts inventory, and work orders. Maintenance personnel can interface with the PMTracker system using a mobile device and the PMTracker App. From this mobile device they can view, comment on, and close work orders. They can also view available inventory and make purchase requests.

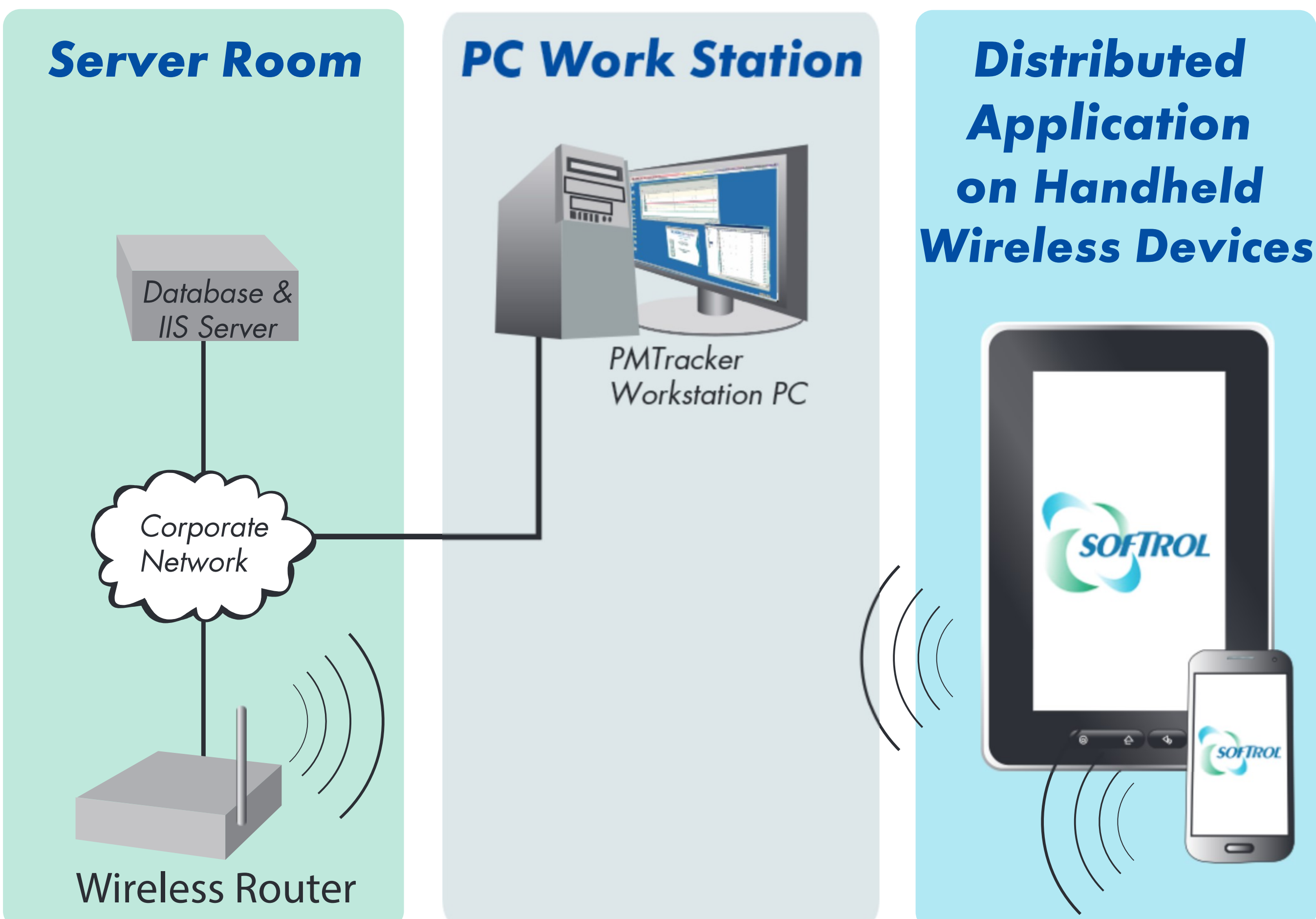


Figure 1. System Overview. The PMTracker application runs on the Workstation PC. Using the workstation, management generates work orders and purchase requests. Maintenance technicians use tablets or smart phones to respond to and complete work orders.

Log Into PMTracker

Your installers created accounts and provided each authorized user of PMTracker with their login ID and password. You need this information to access PMTracker. If you do not have this information either contact your supervisor or contact Softrol support (see "Support: Get Additional Help" on page 59).

1. Click **Windows Start**> **All Programs**.
2. Locate the *PMTracker* folder in the application folders and open the folder.
3. Locate the PMTracker.exe file and double-click.
4. Enter your **User Name** and **Password**.
5. Click **OK**.

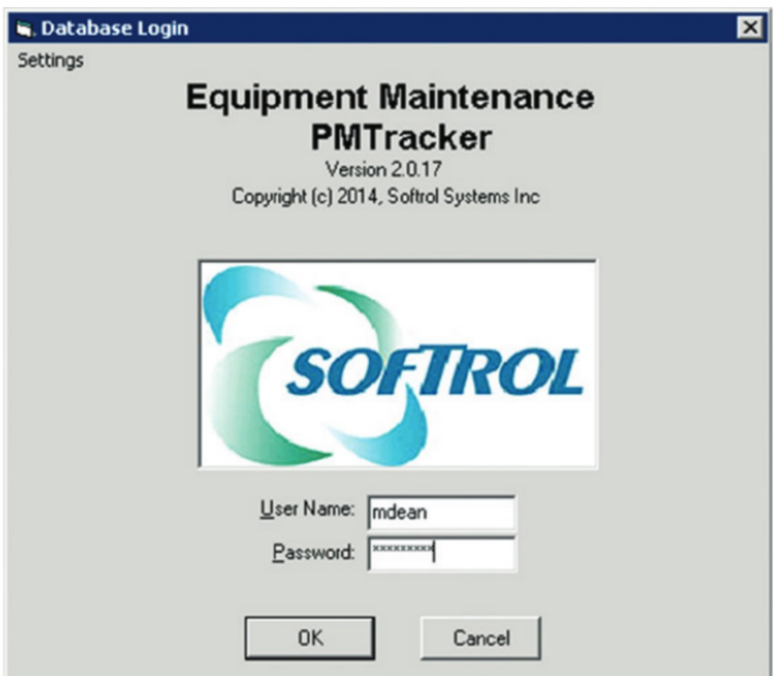


Figure 2. PMTracker login.

This opens the PMTracker application. The application opens to the *PMTracker EasyPath* dialog (see Figure 3). If EasyPath did not open, you can find it under the **View** menu option. The EasyPath dialog allows you to quickly access the most frequently used portions of PMTracker.

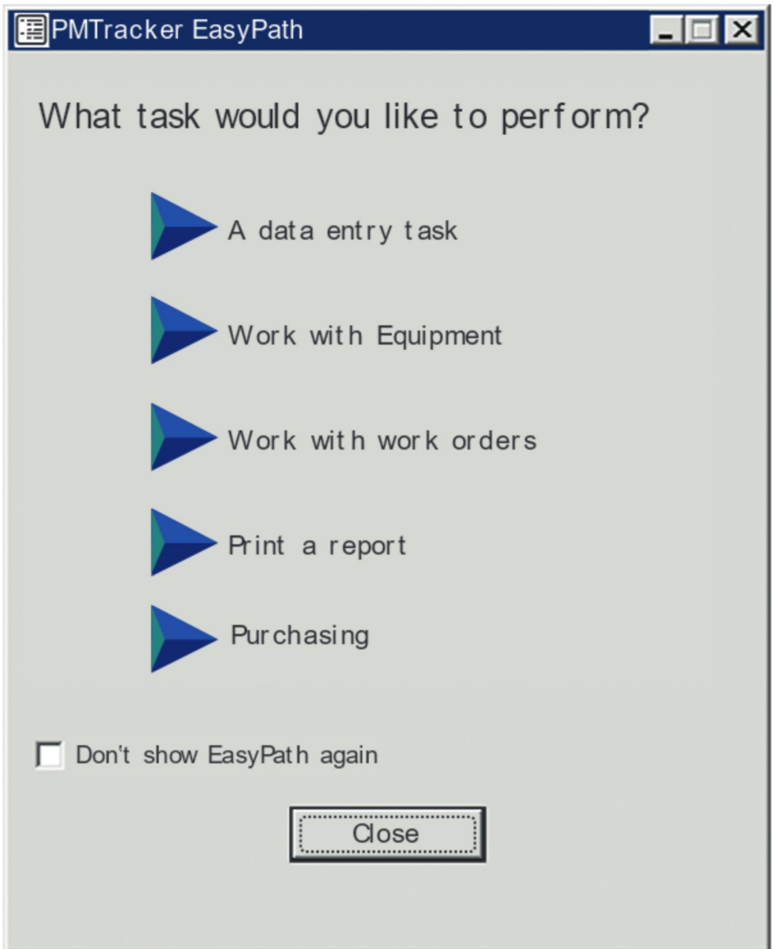


Figure 3. PMTracker EasyPath

Data Entry: Setting up PMTracker

The Data Entry portion of the PMTracker menu allows you to manage the information needed for PMTracker. The data entered and maintained through these settings allows you to manage your preventive maintenance schedules and tasks, work orders, and parts inventory. When you select the Data Entry option from the PMTracker EasyPath PMTracker gives you the following data entry options:

- Manufactures
- Customers
- Distributors
- Repair Parts
- Employees
- Equipment Types
- Maintenance Types
- Service Types

The following sections take you through setting up and maintaining each data entry task using the PMTracker Workstation PC. When setting up your data, think about the logical progression. First you need a manufacturer, a supplier, a model, a unit, and then parts.

Manage Manufacturers

PMTracker can help you manage information about the manufacturers of your equipment and parts. You can add and modify manufacturer information using the **Manufacturers** dialog (see Figure 4). To access the dialog, click **A Data Entry Task**>**Manufactures** from *PMTracker Easypath*.

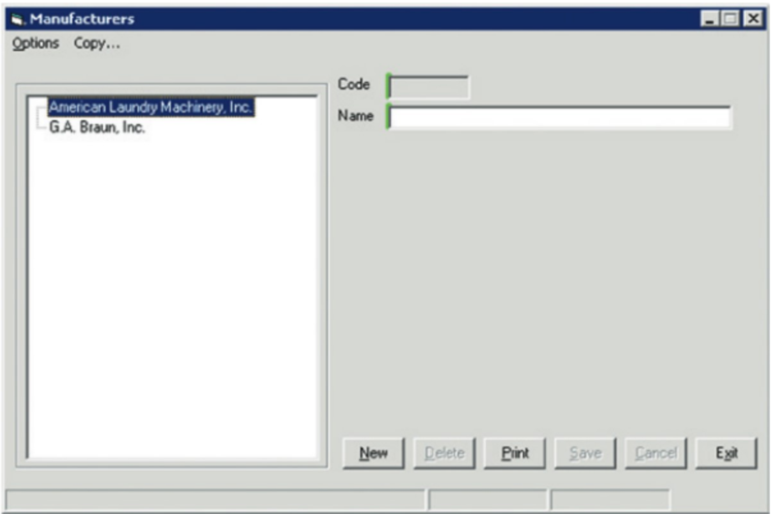


Figure 4. Manufactures dialog.

Add a New Manufacturer

To add a new manufacturer:

1. Open the *Manufacturers* dialog (**EasyPath>A data entry task>Manufacturers**).
2. Click the **New** button (see Figure 4) to open a blank form (see Figure 5).
3. Add a manufacturer code in the **Code** field (required). You can use up to 10 alphanumeric characters.

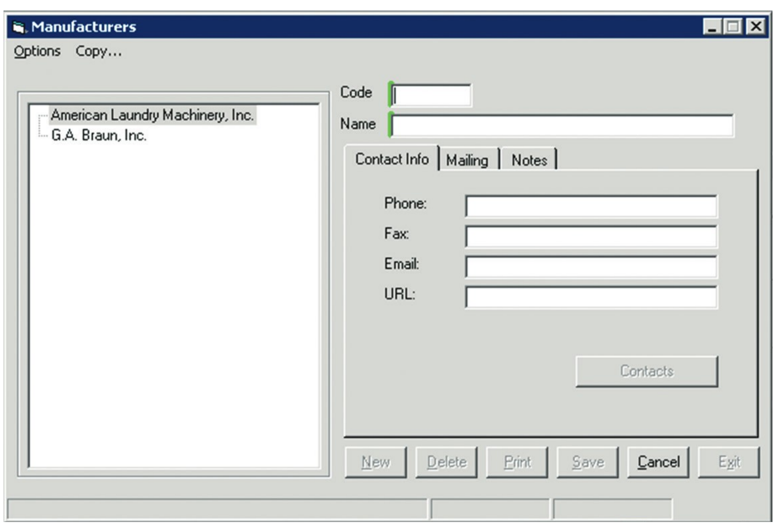


Figure 5. Manufactures New Manufacturer.

4. Add a **Name** (required).

5. Using the **Contact Info** tab, add the optional contact information.

6. Using the **Mailing** tab, add a mailing address (required).

7. Add additional information on the **Notes** tab (optional).

8. Click **Save**.

Add Contacts to a Manufacture

Beyond the basic manufacturer contact information you can add specific contacts for the manufacture.

1. Open the *Manufacturers* dialog (**EasyPath>A data entry task>Manufacturers**).

2. Select a manufacturer in the *Manufacturers* dialog (see Figure 6).

3. Click the **Contacts** button on the **Contact Info** tab to open the *Manufacturer Contacts* dialog (see Figure 7).

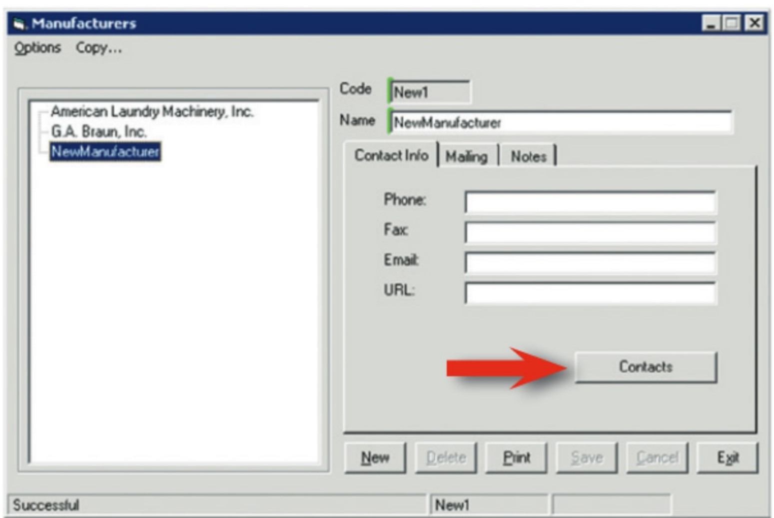


Figure 6. Manufactures dialog.

4. Click **New** on the *Manufacture Contacts* dialog (see Figure 7).

5. Give the contact a **Name** (see Figure 8).

6. Add Contact Info: **Phone**, **Fax**, **Email** (all optional).

7. Add address information on the **Mailing** tab (required).

8. Add a note on the **Notes** tab (optional).

9. Click **Save**.

10. Click **Exit**.

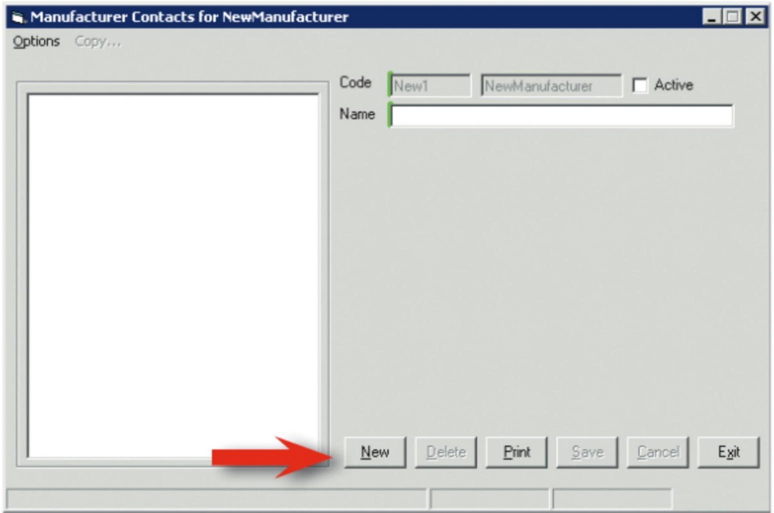


Figure 7. Manufactures Contacts dialog.

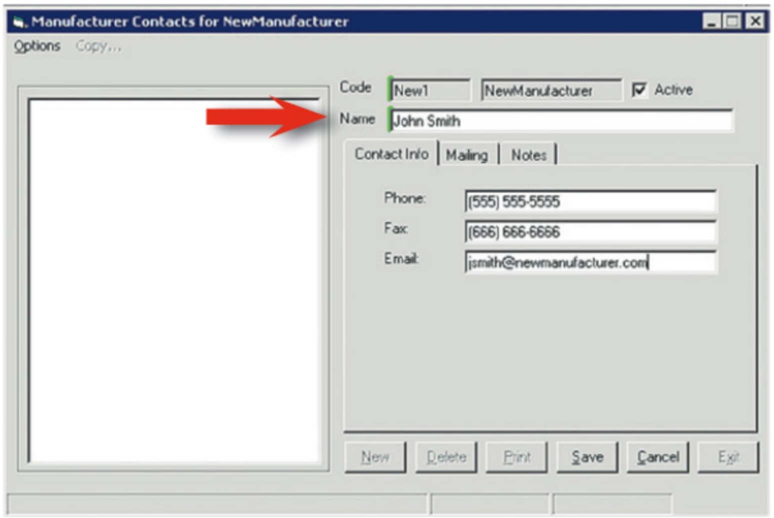


Figure 8. Manufacturer Contacts dialog creating a new contact.

Modify a Manufacturer or their Contacts

You can modify a manufacturer's contact information and the contacts for that manufacturer. To modify a manufacturer:

1. Open the *Manufacturers* dialog (**EasyPath>A data entry task>Manufacturers**).
2. Select the manufacturer in the list on the left of the *Manufacturer* dialog.
3. Modify any of the information except the manufacturer **code**.
4. Use the **Contacts** button to access the *Manufacturer Contacts* dialog to edit or add a new contact.
5. Click **Save** when satisfied with your changes.
6. Click **Exit**.

Delete a Manufacture Contact

PM Tracker does not allow you to delete a contact, but you may switch the contact to inactive.

1. Open the contacts for the manufacturer.
2. Click the box to next to Active to clear the box.
3. Click Save.

You may change them back to active by selecting **Inactive** in the **Options**>**Show** menu (see Figure 9). Locate the contact in the list on the left, and click the **Active** checkbox. Save your changes.

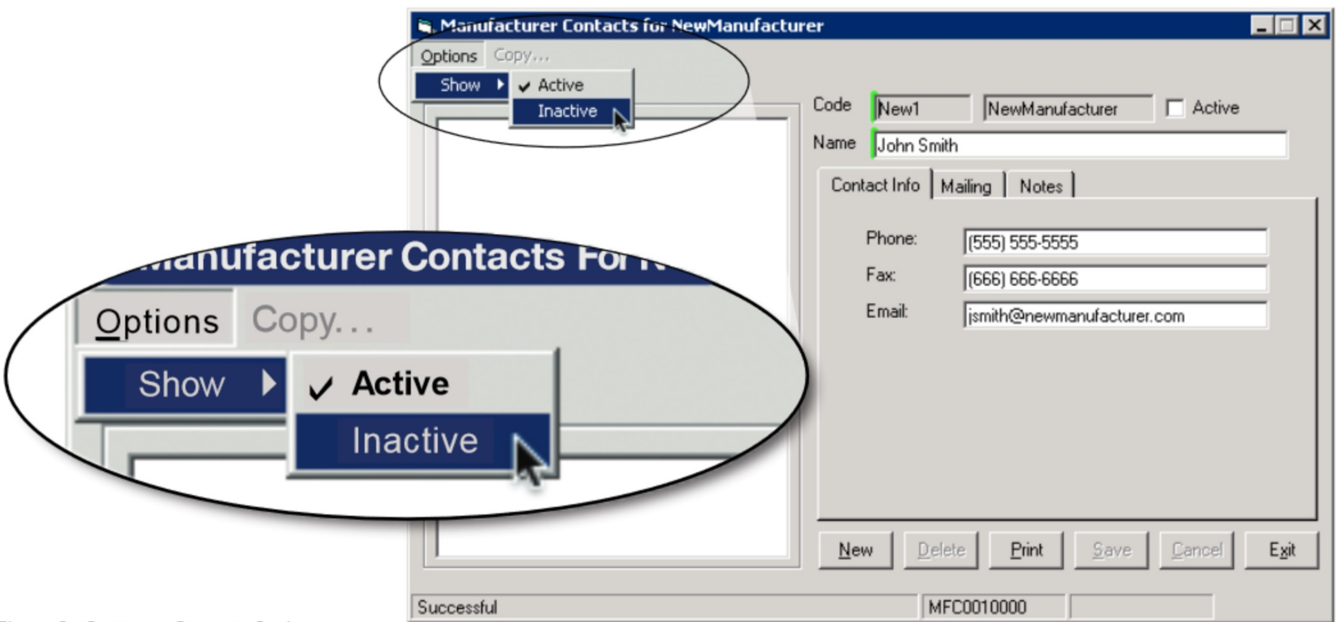


Figure 9. Customer Contacts Options menu.

Manage Distributors

PMTracker maintains distributor information for your equipment and parts. You can add and modify distributor information using the *Suppliers* dialog (see Figure 10). To access the dialog open **EasyPath>A data entry task>Distributors**.

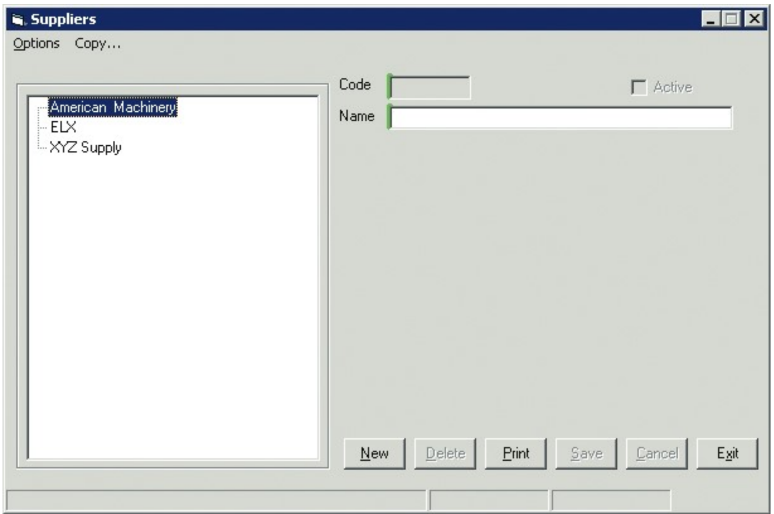


Figure 10. Suppliers dialog.

Add a New Distributor

To add a new distributor:

1. Open the *Suppliers* dialog (**EasyPath>A data entry task>Distributors**).
2. Click the **New** button to open a blank form* (see Figure 11).
3. Add a unique distributor code in the **Code** field (required) . You can use up to 10 alphanumeric characters.
4. Add a **Name** (required).
5. Add the contact information on the **Contact Info** tab (not required)
6. Add the mailing address on the **Mailing** tab (required).
7. Add notes on the **Notes** tab (not required)
8. Click **Save.**

* Select a distributor in the list, and click **Copy** on the dialog menu to copy the distributor's information to a new distributor.

Modify a Distributor

You can modify a distributor's information. To modify a distributor:

1. Open the *Suppliers* dialog (**EasyPath>A data entry task>Distributors**).
2. Select the distributor in the list on the left side of the *Distributors* dialog (filter on active or inactive distributors using the **Options** menu).
3. Modify any of the information except the distributor's **Code**.
4. Use the **Contacts** button to access the distributor's contacts dialog to view, edit, or add a new contact.
5. Use the **Active** check box to change the active status of a distributer.
6. Click **Save** when satisfied with your changes.
7. Click Exit.

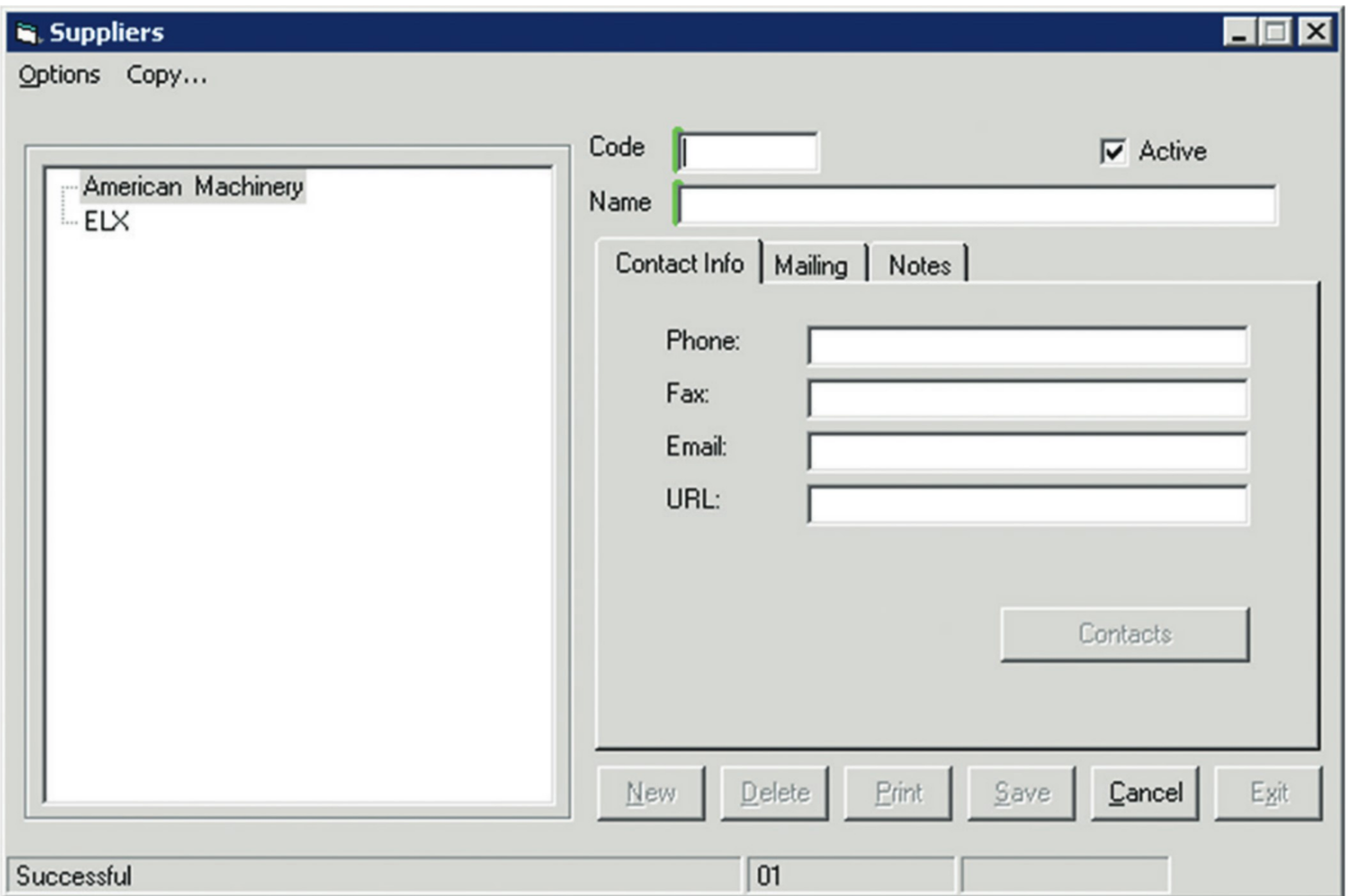


Figure 11. Suppliers dialog blank after clicking **New**.

Add a New Distributor Contact

Once saved, you can add specific contacts for the distributor.

1. Open the *Suppliers* dialog (**EasyPath>A data entry task>Distributors**).
2. Select a distributor in the *Suppliers* dialog (see Figure 12).
3. Click the **Contacts** button on the **Contact Info** tab.

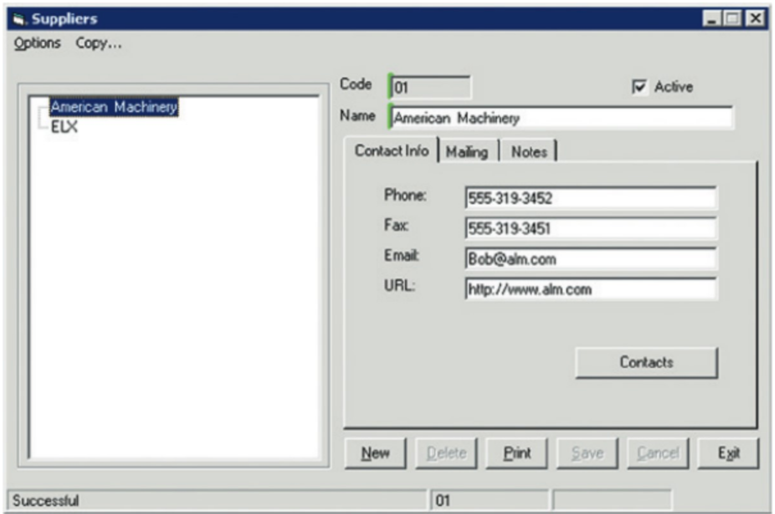


Figure 12. Suppliers dialog .

4. Click **New** on the *Suppliers Contacts* dialog (see Figure 13). This makes the contact information tabs visible.

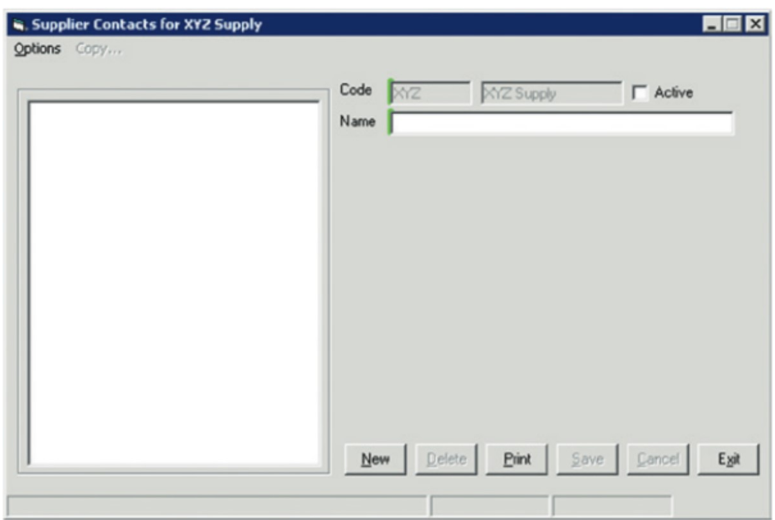


Figure 13. Suppliers Contacts dialog.

5. Complete the **Name** field.

6. Add **Contact Info**: **Phone**, **Fax**, **Email** (all optional).

7. Add address information on the **Mailing** tab (required).

8. Add a note on the **Notes** tab (optional).

9. Click **Save**.

10. Click **Exit**.

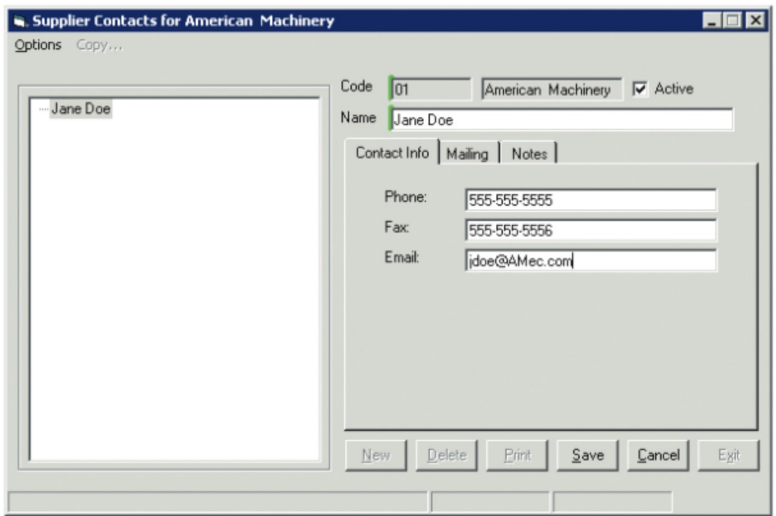


Figure 14. Suppliers Contacts dialog.

Delete a Distributor Contact

PM Tracker does not allow you to delete a contact. You can edit the contact in the *Contacts* dialog and switch it to inactive by removing the check from the **Active** checkbox. Once you deactivate the contact and click save, the contact no longer appears in the contacts list. You can change them back to active by selecting **Inactive** in the **Options**>**View** menu (see Figure 15). Select them in the list on the left, check the **Active** checkbox, and click save.

Figure 15. Suppliers Contacts dialog: Toggling between active and inactive contacts.

Managing Parts

The **Repair Parts** option under **EasyPath>A data entry task>Repair Parts** allows you to add, delete, and modify parts. You can also submit purchase requests from the *Repair Parts* dialog.

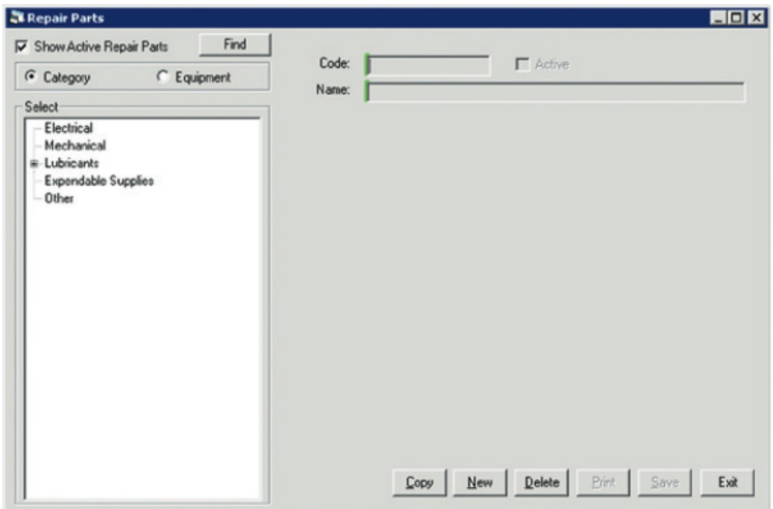


Figure 16. Repair Parts dialog.

Add a New Part

To add a new part:

1. Open the *Repair Parts* dialog (**EasyPath>A data entry task>Repair Parts**).

2. Click either **New** or copy an existing part by selecting it in the list to the left and then clicking **Copy** (see Figure 17).

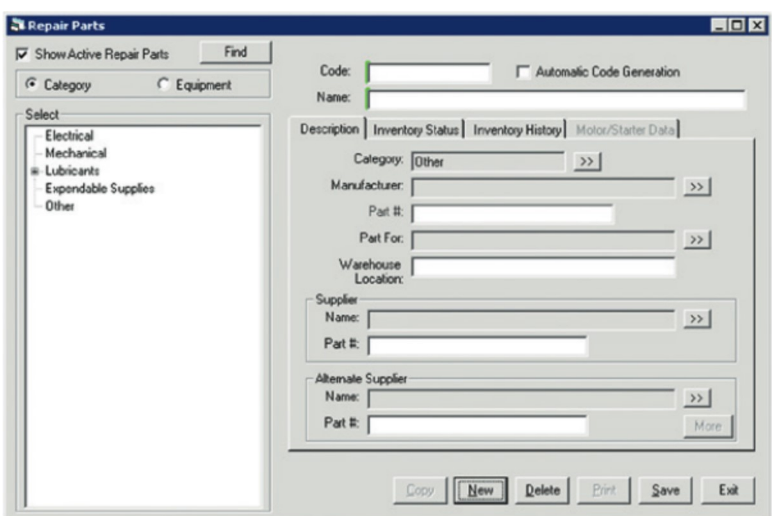


Figure 17. Repair Parts dialog blank form for new part.

3. Enter a part **Code**. You can use your own code (25 alphanumeric characters or less), or you can have the system generate a unique code for you by clicking the **Automatic Code Generation** check box.

4. Enter a part **Name.**

5. Use the selection box's  to set the **Category, Manufacturer**, Equipment (**Part For**), **Supplier**, and **Alternate Supplier**.

6. Open the **Inventory Status** tab (see Figure 18).

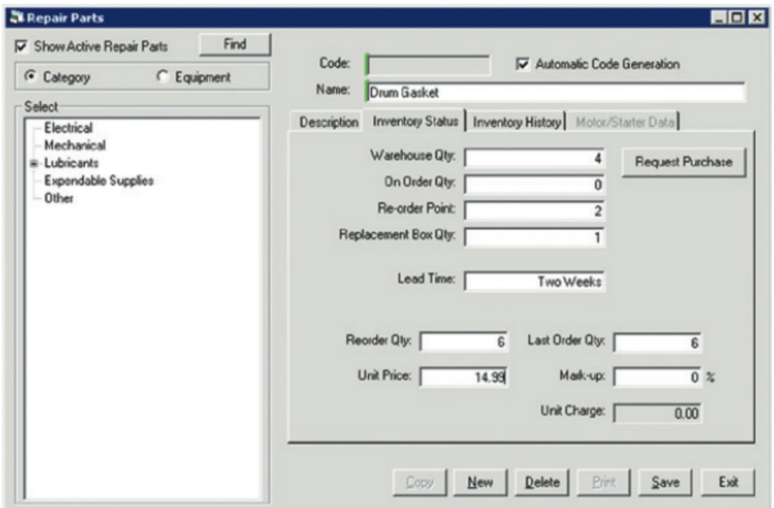


Figure 18. Repair Parts dialog Inventory Status tab.

7. Set **Warehouse Quantity** to the current inventory count.

8. Set the **On Order Quantity** to the number currently on order (if any).

9. Set the **Reorder Point** to the minimum number needed in inventory prior to ordering more.

10. Set the **Replacement Box Quantity** to the standard order or case quantity.

11. Set the **Lead Time** to the time required to receive the part into inventory.

12. Set the **Reorder Quantity** to the number of items/cases for each reorder to bring inventory back to the desired level.

13. Set the **Unit Price**, **Last Order Quantity**, and **Mark-up** (if you service external customers).

14. Record historical data about the part (if any) on the **Inventory History** tab.

15. Use the **Motor/Starter Data** tab (for electrical parts only) to record information specific to those part types.

16. Click **Save**.

17. Click **Exit**.

Modify the Repair Part Information and Inventory

You can modify the information for any part by:

1. Open the *Repair Parts* dialog (**EasyPath>A data entry task>Repair Parts**).
2. Click to highlight the part you would like to modify in the **Select** list on the left.
3. Make your changes.
4. Click **Save.**
5. Click **Exit.**

Delete a Repair Part (Deactivate)

You can also "delete" the part. Deleting a part in PMTracker doesn't actually remove it from the system; instead. the system changes its status to "inactive." The inactive status prevents it from showing up as a selection option, but it keeps the part in the system to maintain data integrity.

1. Open the Repair Parts dialog (**EasyPath>A data entry task>Repair Parts**).
2. Click to highlight the part you would like to delete in the list on the left.
3. Click **Delete**.
4. Click **Yes** in the confirmation dialog.

Reactivate a Repair Part

When you change a repair part's status to inactive (delete it), you can change the status back to active making it available for reorder and adding to work orders.

1. Open the *Repair Parts* dialog (**EasyPath>A data entry task>Repair Parts**).
2. Clear the check box next to **Show Active Repair Parts.**
3. The **Select** list now only shows inactive parts.
4. Locate the part you wish to activate.
5. Click the **Active** check box next to the part code number.
6. Click **Save**.

Assign Parts to Equipment

When creating work orders, you have an option to see only parts associated with the piece of equipment or all parts. You can make these associations when adding the new parts if the equipment model exists in the system. Otherwise, you can wait and make the association later. To make these part associations, you use the *Repair Parts* dialog.

From the *EasyPath* menu:

1. Click **EasyPath>A data entry task>Repair Parts** to open the **Repair Parts** dialog.
2. Select the part you wish to associate with the equipment model by clicking.
3. Click the selection button to the right of the **Part For** text field to open the *Selection* dialog.
4. Locate the equipment model in the list and click **Select**.
5. Click **Save**.

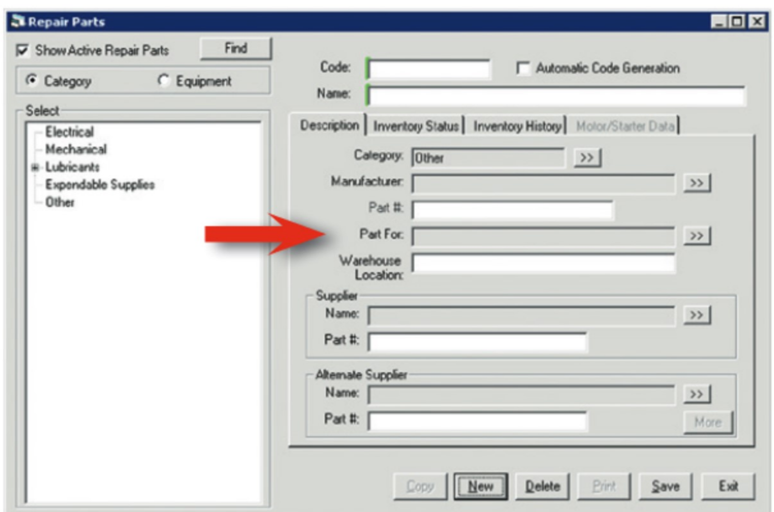


Figure 19. Repair Parts dialog.

Manage Customers

Internal or external, one or many, you need to maintain information about your customers. You can add and modify customer information using the **Customers** dialog (see Figure 20). To access the dialog open **EasyPath>A data entry task>Customers**.

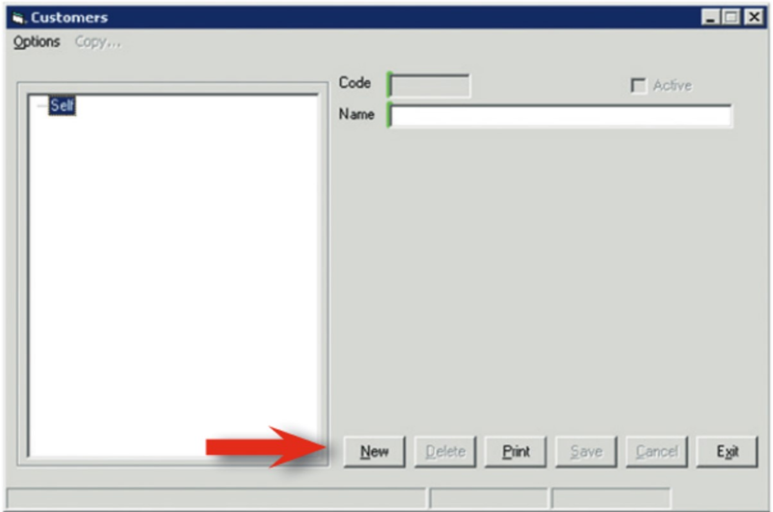


Figure 20. Customers dialog.

Add a New Customer

To add a new customer:

1. Open the *Customers* dialog (**EasyPath>A data entry task>Customers**).
2. Click the **New** button to open a blank form (see Figure 20).
3. Add a customer code in the **Code** field (required). You can use up to 10 alphanumeric characters (see Figure 21 on page 17).
4. Add a **Name** (required).
5. Add the mailing address on the **Mailing** tab (required).
6. Add the **Billing** and **Delivery** information (optional).
7. Select the customer **Types** by clicking to select or deselect types in the list. You can assign multiple types to each customer (not required).
8. Click **Save.**
9. Click **Exit.**

Modify a Customer

You can modify a customer's information. To modify a customer:

1. Open the *Customers* dialog (**EasyPath>A data entry task>Customers**).
2. Select the customer in the list on the left side of the *Customers* dialog. You can filter the list using the **Options** menu above the list.
3. Modify any of the information except the customer **Code**.
4. Use the **Contacts** button to access the *Customer Contacts* dialog to edit or add a new contact.
5. Use the **Active** check box to change the active status of a customer.
6. Click **Save** when satisfied with your changes.
7. Click **Exit**.

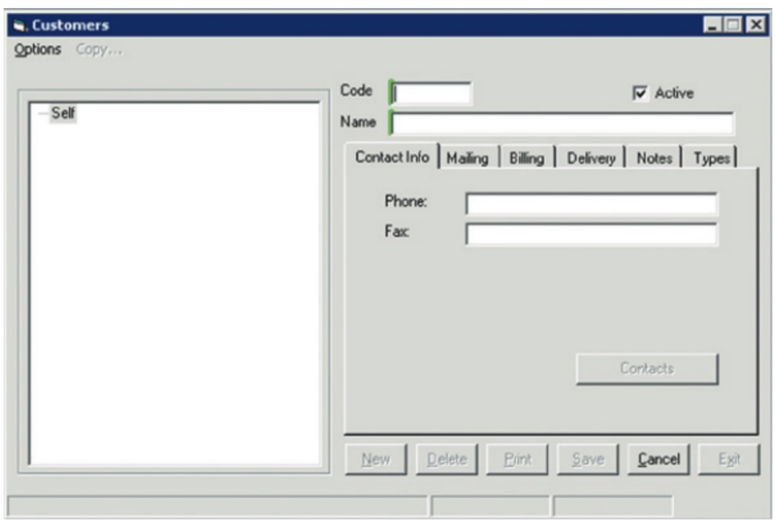


Figure 21. Customers dialog blank form for a new customer.

Add a Customer Contact

Once saved, you can add specific contacts for the customer.

1. Open the *Customers* dialog (**EasyPath>A data entry task>Customers**).
2. Select a customer in the *Customers* dialog (see Figure 20).
3. Click the **Contacts** button on the **Contact Info** tab.
4. Click **New** on the *Customers Contacts* dialog (see Figure 22).
5. Give the contact a **Name**.
6. Add **Contact Info**: **Phone**, **Fax**, **Email** (all optional).
7. Add address information on the **Mailing** tab (required).
8. Add a note on the **Notes** tab (optional).
9. Click **Save**.
10. Click **Exit**.

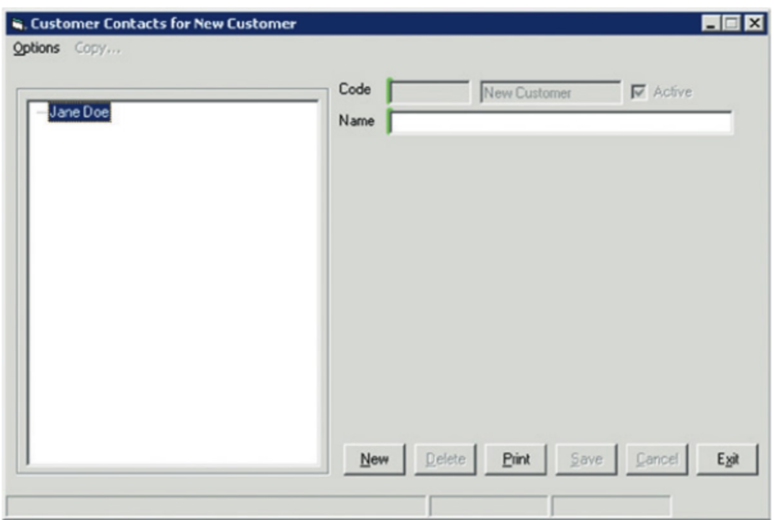


Figure 22. Customer Contacts dialog.

Managing Employees

You can use PMTracker to maintain information about your employees. Although you may not use all the features of the Employee management portion of PMTracker, you need to add each employee that uses the application. Access the *Employee Maintenance* dialog by clicking **EasyPath>A data entry task> Employees** from PMTracker *EasyPath*.

Add a New Employee

To add a new employee:

1. Open the *Employee Maintenance* dialog (**EasyPath>A data entry task>Employees**).

2. Click the **New** button on the *Employee Maintenance* dialog to open a blank form (see Figure 23).

3. Complete the **First** and **Last Name** fields (required).

4. Include a value for **Social Security Number** (required). If your plant chooses not to use PMTracker to maintain employee data complete the field with a value such as "n/a."

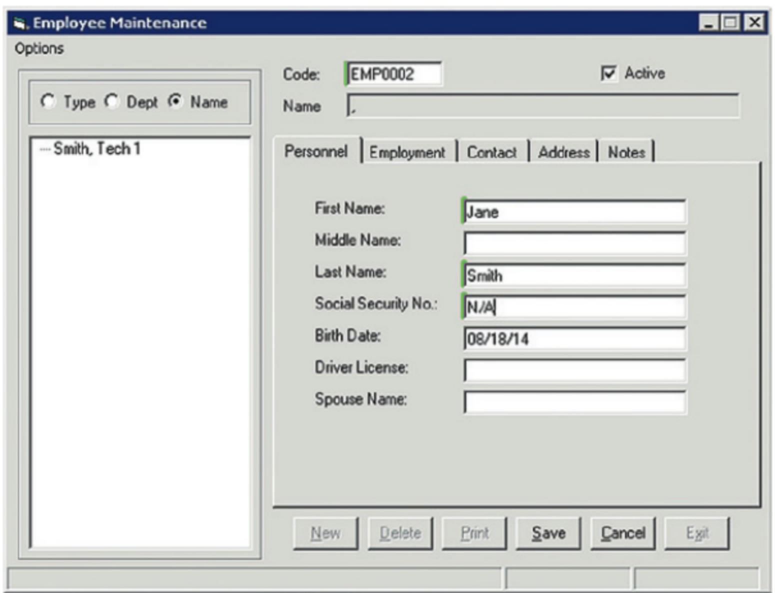


Figure 23. Employee Maintenance, Personnel tab**.**

5. Click the **Employment** tab.

6. Provide a **Title** (required).

7. Click the >> button next to **Employee Type** and select an employee type(required). You can also create new employee types using the **New** button on the **Employee Type** dialog.

8. Click the >> button next to **Department Code** and select a Department. You can also create new departments using the **New** button.

9. Click the **Contact** tab and complete the contact information.

10. Click the **Address** tab and complete the information (required).

11. Click **Save** when you have completed the fields.

Modify an Employee Record

1. Open the *Employee Maintenance* dialog by clicking **EasyPath>A data entry task> Employees**.
2. Select an employee from the list on the left.
3. Modify any of the employee data except the **Employee Code**.
4. Click **Save** when finished.
5. Click Exit.

Delete an Employee Record (Deactivate)

You can't delete an employee from the system, but you can deactivate them.

1. Open the *Employee Maintenance* dialog by clicking **EasyPath>A data entry task> Employees**.
2. Select an employee from the list on the left.
3. Click the check box next to **Active** to deselect it. Checked means the employee is currently employed and available for assignment to work orders.
4. Click save.

Viewing Inactive Employee Records

To view or reactivate an inactive employee record:

1. Open the *Employees* dialog (**EasyPath>A data entry task>Employees**).
2. Click **Options>Show>Inactive** in the menu in the top left (see Figure 24).

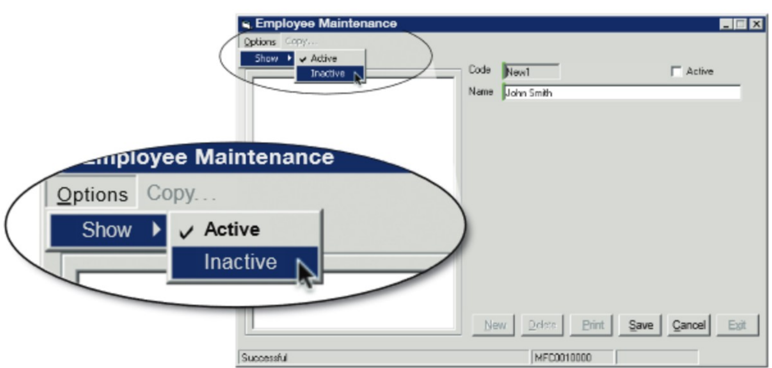


Figure 24. Employee Maintenance dialog: Toggling between active and inactive employee views.

Manage Equipment Types

Each piece of equipment belongs to an equipment type; e.g., tunnel washers and pocket washers both belong to the equipment type, "Washer." Organize equipment into categories that makes sense for your plant or customer. You can access the *Equipment Type* dialog by clicking **EasyPath>A data entry task> Equipment Types**.

Add an Equipment Type

To add an equipment type:

1. Open the Equipment Types dialog by clicking **EasyPath>A data entry task> Equipment Types**.
2. Click **New** on the *Equipment Types* dialog (see Figure 25).
3. Enter a unique equipment **Code**.
4. Enter an equipment **Description**.
5. Click **Save.**

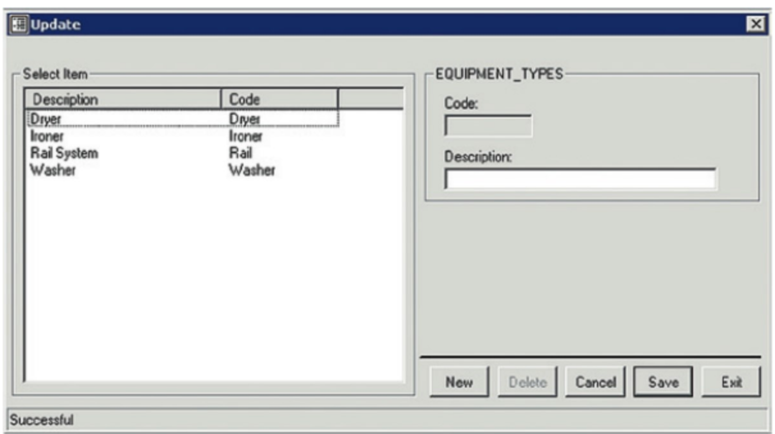


Figure 25. Equipment Types dialog.

Modify an Equipment Type

To modify an equipment type:

1. Open the *Equipment Types* dialog by clicking **EasyPath>A data entry task> Equipment Types**.
2. Select the type on the *Equipment Types* dialog.
3. Modify the equipment **Description**.
4. Click **Save.**

Delete an Equipment Type

You cannot delete an equipment type.

Manage Maintenance Types

PM Tracker divides the different types of maintenance into groups. Keeping the types specific to skilled tasks such as electrical and plumbing allows you to make better choices when assigning employees to work orders. You can access the *Maintenance Types* dialog by clicking **EasyPath>A data entry task> Maintenance Types**.

Add a Maintenance Type

To add a maintenance type:

1. Open the *Maintenance Types* dialog by clicking **EasyPath>A data entry task> Maintenance Types**.
2. Click **New** on the *Maintenance Types* dialog (see Figure 26).
3. Enter a unique maintenance type **Code**.
4. Enter a maintenance type **Description**.
5. Click **Save.**

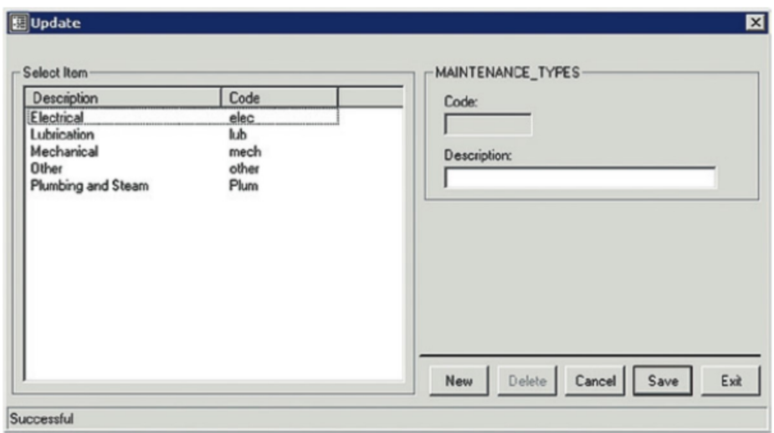


Figure 26. Maintenance Types dialog.

Modify a Maintenance Type

To modify an equipment type:

1. Open the *Maintenance Types* dialog by clicking **EasyPath>A data entry task> Maintenance Types**.
2. Select the type on the *Maintenance Types* dialog.
3. Modify the maintenance type **Description**.
4. Click **Save.**

Delete a Maintenance Type

You can not delete a maintenance type.

Manage Service Types

The maintenance types places tasks into general categories; the service type further refines the action required by the employee. Service types include actions such as replace, tighten, lubricate, and repair. You can access the *Service Types* dialog by clicking **Service Types** under **Data Entry** using *PMTracker EasyPath*.

Add a Service Type

To add a Service type:

1. Open the *Service Types* dialog by clicking **EasyPath>A data entry task> Service Types**.
2. Click **New** on the *Service Types* dialog (see Figure 27).
3. Enter a unique service type **Code**.
4. Enter a service type **Description**.
5. Click **Save.**

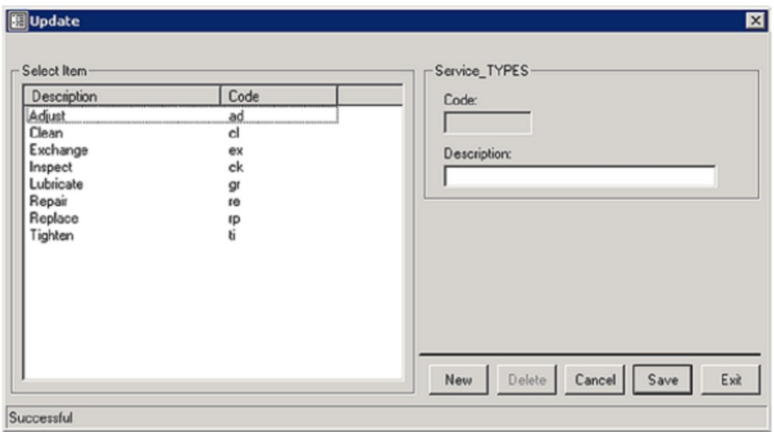


Figure 27. Maintenance Types dialog.

Modify an Service Type

To modify an equipment type:

1. Open the *Service Types* dialog by clicking **EasyPath>A data entry task>Service Types**.
2. Select the type on the *Service Types* dialog.
3. Modify the service type **Description**.
4. Click **Save.**

Delete a Service Type

You can not delete a service type.

Working with Equipment

The *Equipment* section of PMTracker allows you to maintain the information about each specific piece of equipment. The *Equipment* dialog allows you to add and remove equipment, and manage the equipment's maintenance task, maintenance schedules, and track equipment run times. To access the *Equipment* dialog: Click **Work with Equipment** in PMTracker *EasyPath* to access the *Equipment* dialog (see Figure 28). The list on the left sorts your equipment based on the model. You can also filter the equipment by customer.

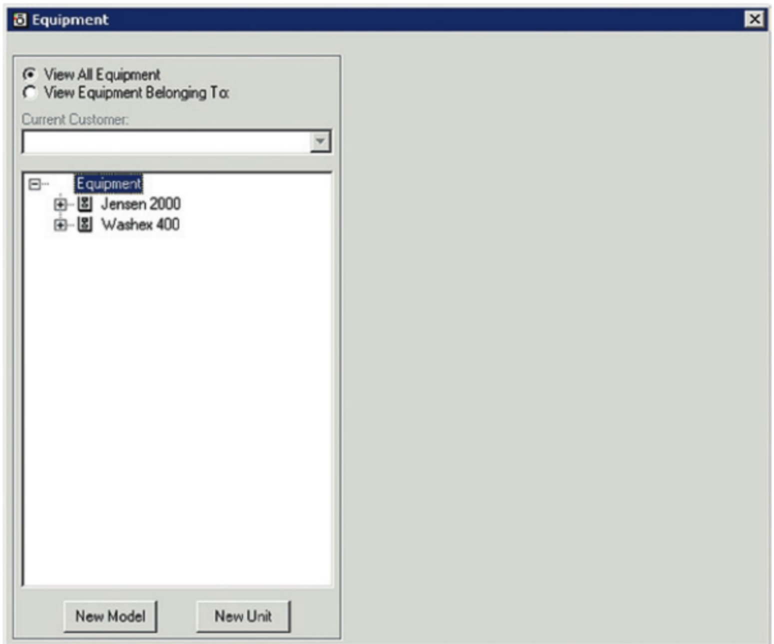


Figure 28. Equipment dialog.

Add a New Model

Each piece of equipment needs added to the system, but first you need to add the equipment's model. The model, is typically the manufacturer or the brand coupled with the model name; e.g., Honda Civic or Jensen 2000.

1. Click **EasyPath>Work with Equipment** in the *PMTracker* menu to access the *Equipment* dialog (see Figure 28).
2. Click **New Model** on the **Equipment** dialog.
3. Enter a name for the new equipment model (see Figure 29).
4. Click **Save.**

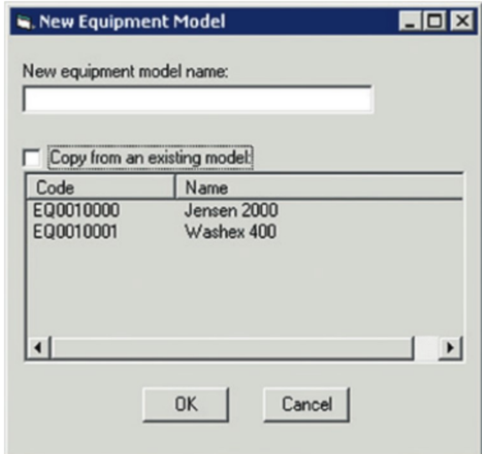


Figure 29. New Equipment Model dialog.

Add a New Unit

You may have only one or many pieces of equipment in each model. You need to choose a unique identifying name for each piece of equipment. You might use the serial number, tag number, or a simple name such as Washer1. Establishing a convention and sticking to it will help avoid confusion. To add a new unit:

1. Click **EasyPath>Work with Equipment** in the *PMTracker* menu to access the Equipment dialog.
2. Click **New Unit** on the *Equipment* dialog (see Figure 28).
3. Give the new unit a name (see Figure 30).
4. Select a model by clicking it in the model list..
5. Click **OK**. You have added a new piece of equipment.
6. Complete any additional information about the equipment on the **Equipment** tab (see Figure 31)
7. Click Save.

Figure 30. New Unit dialog.

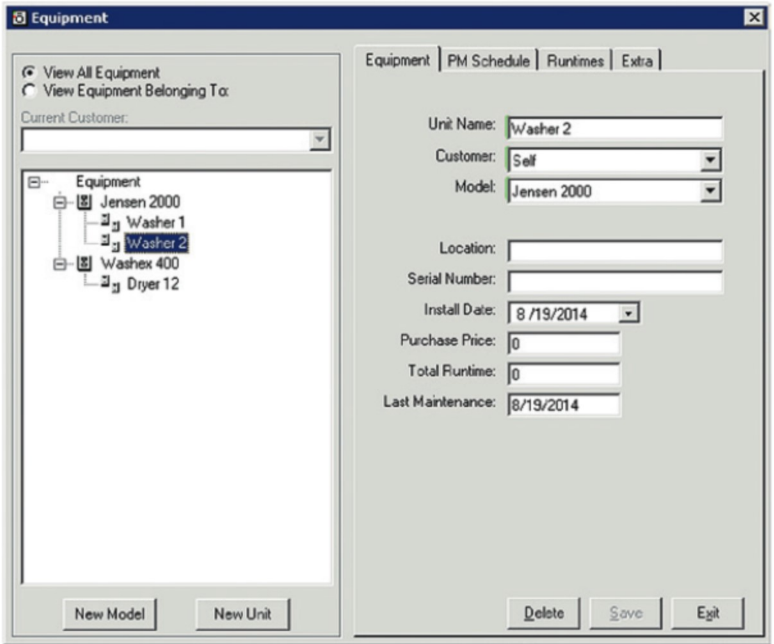


Figure 31. Equipment dialog **Equipment** tab.

Add a Preventive Maintenance Task

You can add preventive maintenance tasks to an individual piece of equipment, or you can add preventative maintenance tasks to all the units with the same model type.

1. Click **EasyPath>Work with Equipment** in the *PMTracker* menu to access the *Equipment* dialog.

2. Select a piece of equipment or a equipment model in the equipment list on the left.

3. Click the **PM Schedule** tab (see Figure 32).

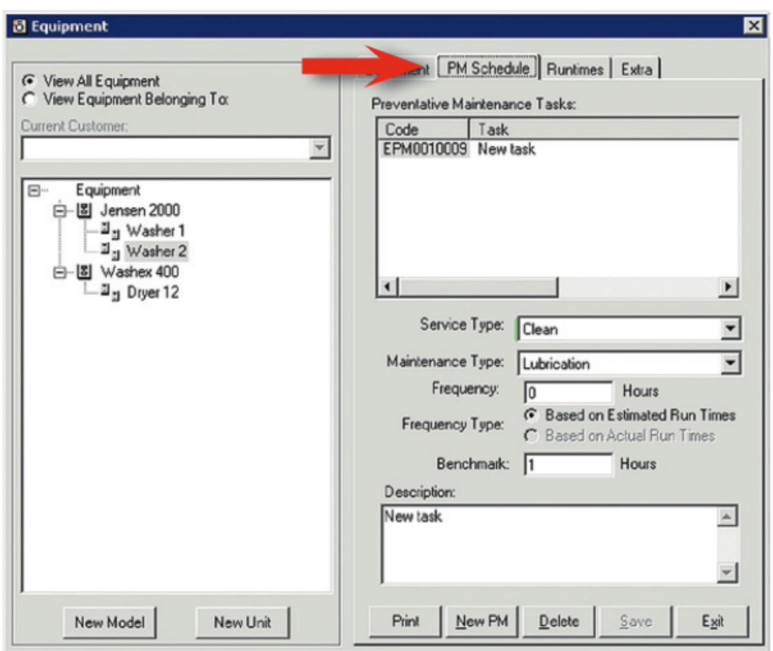


Figure 32. Equipment dialog **PM Schedule** tab.

4. Click the **New PM** button. PMTracker creates a task with the name “New task.”

5. Define the “New Task.” Click to select the new task in the **Preventative Maintenance Tasks** selection box, if it isn’t already selected.

6. Give the task a **Service Type** and a **Maintenance Type.** If you need a service or maintenance type that isn’t in the list you will need to define them see “Add a Service Type” on page 23 or “Add a Maintenance Type” on page 22.

7. Add the **Frequency** (in runtime hours) that the task needs completed.

8. Select the **Frequency Type** (The “Based on actual run times” option isn’t available on all equipment).

9. Set the **Benchmark**. The benchmark is the expected labor hours the task will take in decimal format. For example use 0.5 for a half hour.

10. Enter a short **Description**. This value also becomes the PM Task’s name. You can enter up to 256 characters and spaces.

11. Click **Save**.

12. Continue adding tasks until you have entered all of the preventive maintenance tasks for the piece of equipment or model type.

Set Equipment Run Times

PMTracker needs to know the typical weekly run time for most pieces of equipment. This allows PMTracker to calculate when to issue a preventive maintenance work order. To set the daily run times:

1. Click **EasyPath>Work with Equipment** to access the Equipment dialog.

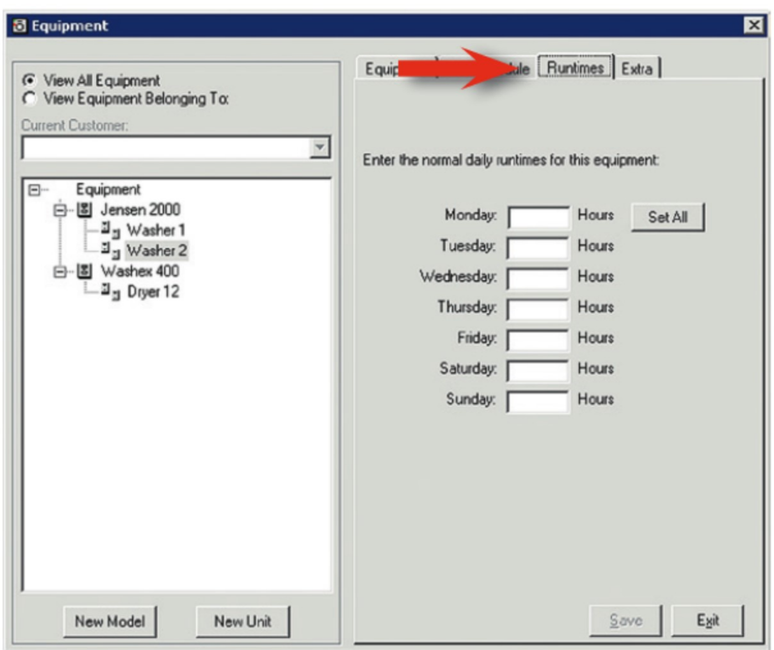


Figure 33. Equipment dialog **Runtimes** tab.

2. Select a piece of equipment in the equipment list on the left.

3. Click the **Runtimes** tab (see Figure 33).

4. Enter the daily run times in whole hours.

5. Click **"Save**."

Adjust Equipment Runtime

Things happen that affect equipment run times; e.g., the plant needs to run into overtime, or a piece of equipment is down for a period of time. Whatever the reason, you need to adjust the equipment's run times in PMTracker so that preventative maintenance schedules reflect the changes in equipment use. To adjust equipment run times:

1. Click click **EasyPath>Work with Equipment** in the PMTracker menu to access the *Equipment* dialog.

2. Select a piece of equipment in the list on the left.

3. Click the **Extra** tab (see Figure 34).

4. Click **New**.

5. Select the **Date.**

6. Select either **Extra** or **Downtime hours**.

7. Enter any **Comments** (100 character limit).

8. Click **Save**.

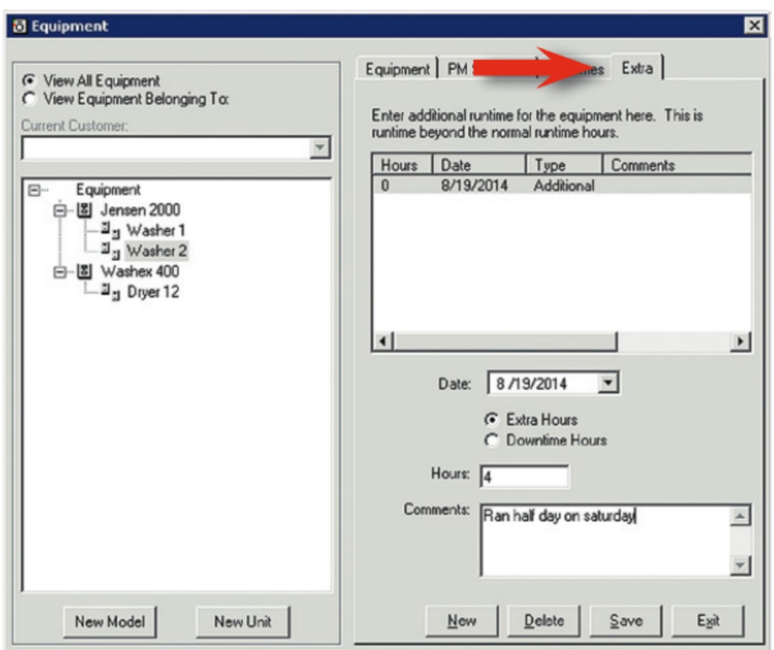


Figure 34. Equipment dialog **Extra** tab.

Modify an Equipment Model or Unit

You can modify any of the equipment information except the model code. To modify a model or unit:

1. Click **EasyPath>Work with Equipment** to access the Equipment dialog.
2. Select a piece of equipment or model in the list on the left.
3. Navigate through the tabs to make your needed changes.
4. Click **Save**.

Delete an Equipment Unit

You may have the need to delete equipment when the plant retires or upgrades it. To delete a piece of equipment:

1. Click **EasyPath>Work with Equipment** to access the Equipment dialog.
2. Select a piece of equipment in the equipment list on the left.
3. Click **Delete.**
4. Click **Yes** in the confirmation dialog.

Delete an Equipment Model

You may need to delete equipment models when the plant retires or upgrades all of the units. Delete all of the model's unit's then delete the equipment model:

1. Click **EasyPath>Work with Equipment** to access the *Equipment* dialog.
2. Select a piece of equipment in the equipment list on the left.
3. Click **Delete.**
4. Click **Yes** in the confirmation dialog.

Work with Work Orders

The work order is at the core of PMTracker. PMTracker, once set up, will generate preventive maintenance work orders based on actual and estimated runtime of the tracked equipment. You can also generate informational and breakdown work orders as needed.

Opening New Work Orders

You have two options for creating work orders: generated or manual.

Generating Preventive Work Orders

Start each day by generating the preventive work orders.

1. Open PMTracker
2. Select **Tools**> **Work Order Generator**.
3. Click **Start** (see Figure 35).

PMTracker generates a record of the generation process that you can then print or save as a text file. Select **Quiet Mode** under the **Options** menu for a less detailed record. Once the generator finishes, you can manage the work orders using the desk top application or using the mobile application.

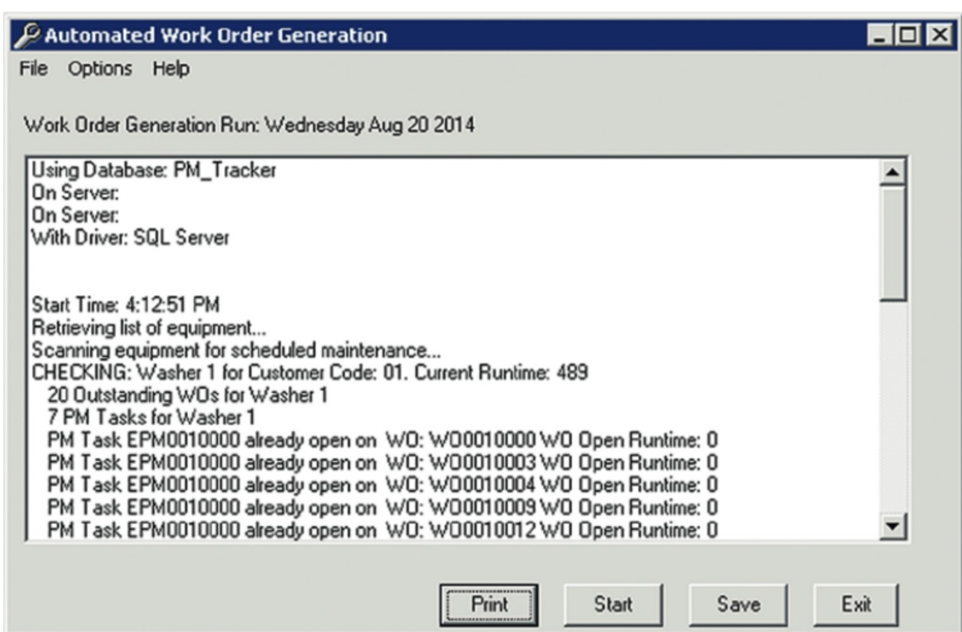


Figure 35. Automated Work Order Generation dialog.

Manual Work Order Generation

You can manually generate preventive maintenance, breakdown, or informational work orders.

1. Click **EasyPath>Work with Work Orders** access the *Work Orders* dialog.

2. Click the **New Work Order** button.

A work order is created using system defaults. Your new work order is now in the **Select a Work Order** frame on the left side of the dialog window.

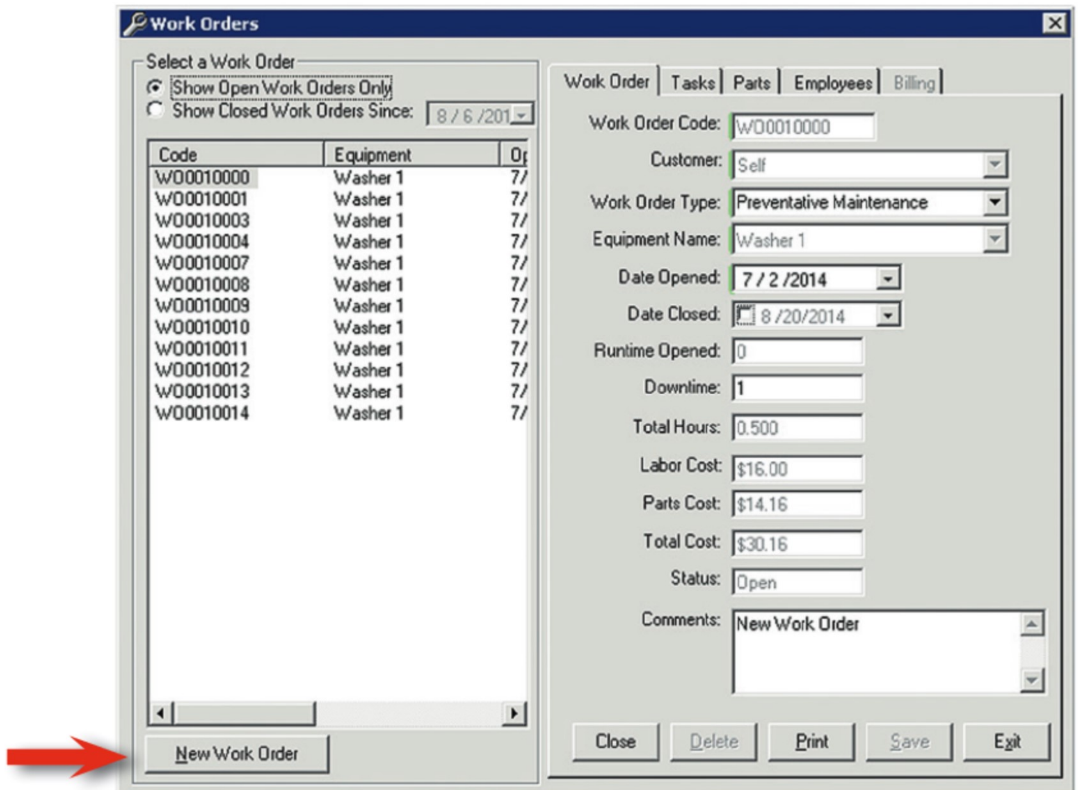


Figure 36. Work Orders dialog.

Managing work orders

Once generated you can modify, add tasks (preventive maintenance work orders only), add parts, assign emploees, delete, and close work orders.

Modify a Work Order

You can modify a work order's type, the open date, the number of hours of downtime, and you add comments. On manually created work orders you can change the unit needing the work by selecting a different unit in the **Equipment Name** dropdown.

1. Click **EasyPath>Work with Work Orders** in PMTracker to access the *Work Orders* dialog.

2. Select a work order for modification in the **Select a Work Order** frame.
3. Using the **Work Order** tab, make your changes.
4. Click **Save**.

Add Tasks

You can add tasks to Preventive Maintenance work orders only.

1. Click **EasyPath>Work with Work Orders** to access the *Work Orders* dialog.
2. Select a preventive maintenance work order in the **Select a Work Order** frame.
3. Click the **Tasks** tab (see Figure 37).
4. Click the **Add** button.

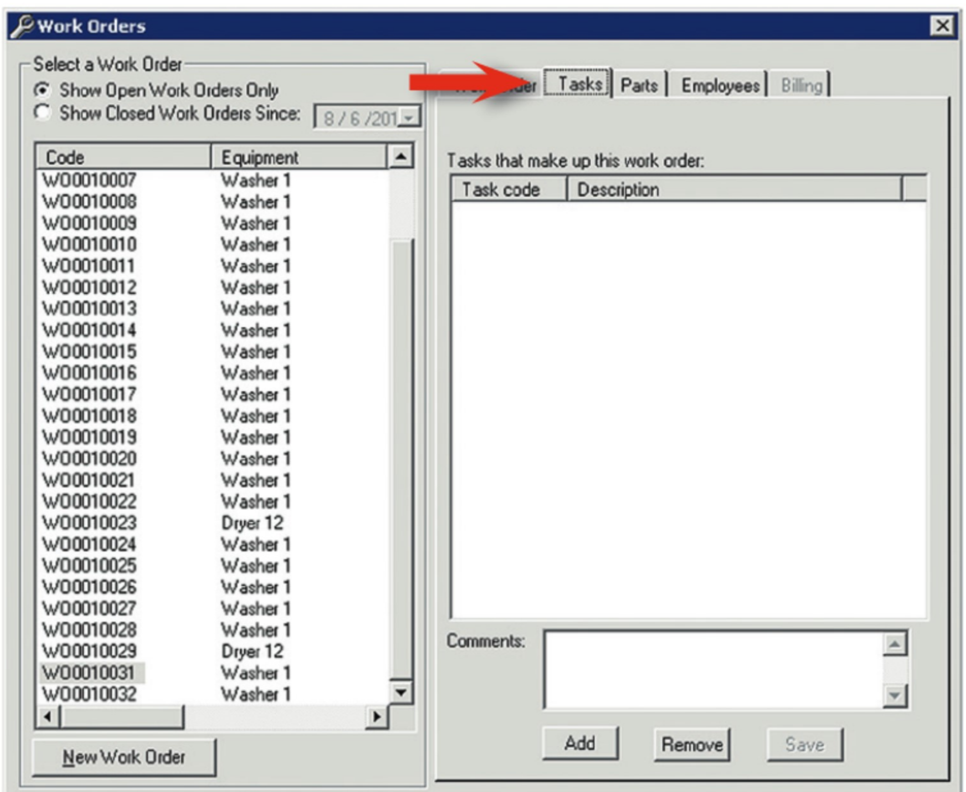


Figure 37. Work Orders: Tasks dialog.

5. Select a task in the **Task Selection** dialog window (see Figure 38).
6. Click **OK**.
7. Click **Save** on the *Work Order* dialog.
8. Continue adding tasks as needed.

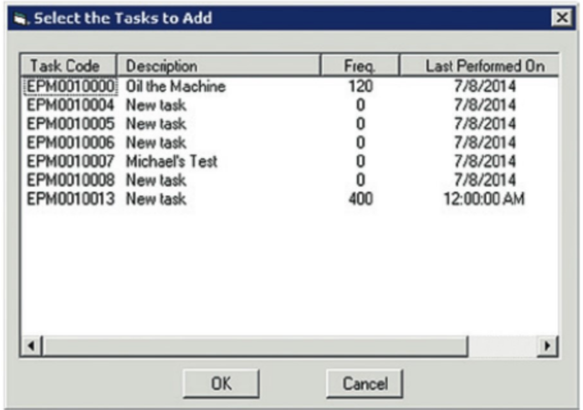


Figure 38. Select the Tasks to Add dialog.

Add Parts

You can add parts to any work order type. To add parts to a work order:

1. Click **EasyPath> Work with Work Orders** to access the *Work Orders* dialog.
2. Select a work order for modification in the **Select a Work Order** frame.
3. Click the **Parts** tab (see Figure 39).
4. Select **Show All Parts** or **Related Parts** to only show parts used for this equipment model.

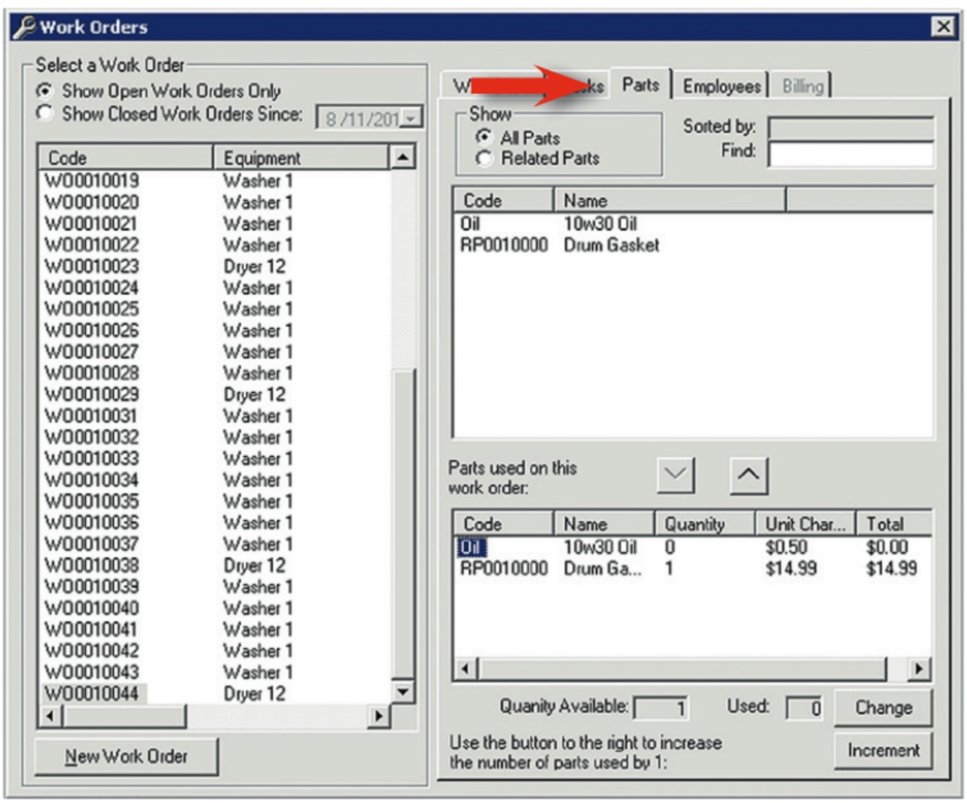


Figure 39. Work Orders: Parts dialog.

5. Select the part you would like to add to the work order in the top list.

6. Click the add button .

7. Enter the quantity used in the *Repair Part Usage* dialog (see Figure 40). The Repair Part Usage dialog is displayed when you add a part to the work order. You can leave this set to zero, and later when closing the work order, set the quantity used. To change the quantity used at a later time: select the part in the **Parts Used** list (back on the **Work Orders** dialog), and click the **Change** or increment button (see Figure 41).

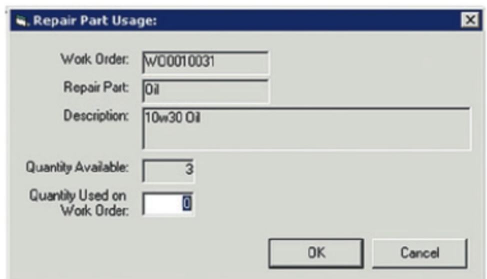


Figure 40. Repair Part Usage dialog.

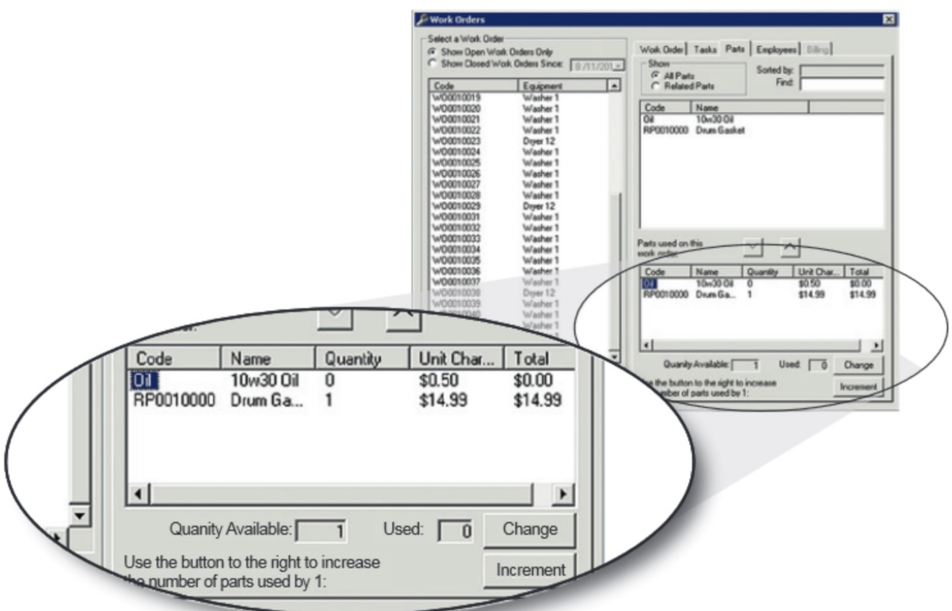


Figure 41. Work Orders: Parts dialog. Use the Change or increment to adjust the number of parts used.

Add Employees

After creating a work order you can assign employees to the work order. You can also record their time spent on the work order prior to closing the work order. To add an employee:

1. Click **EasyPath> Work with Work Orders** to access the *Work Orders* dialog.

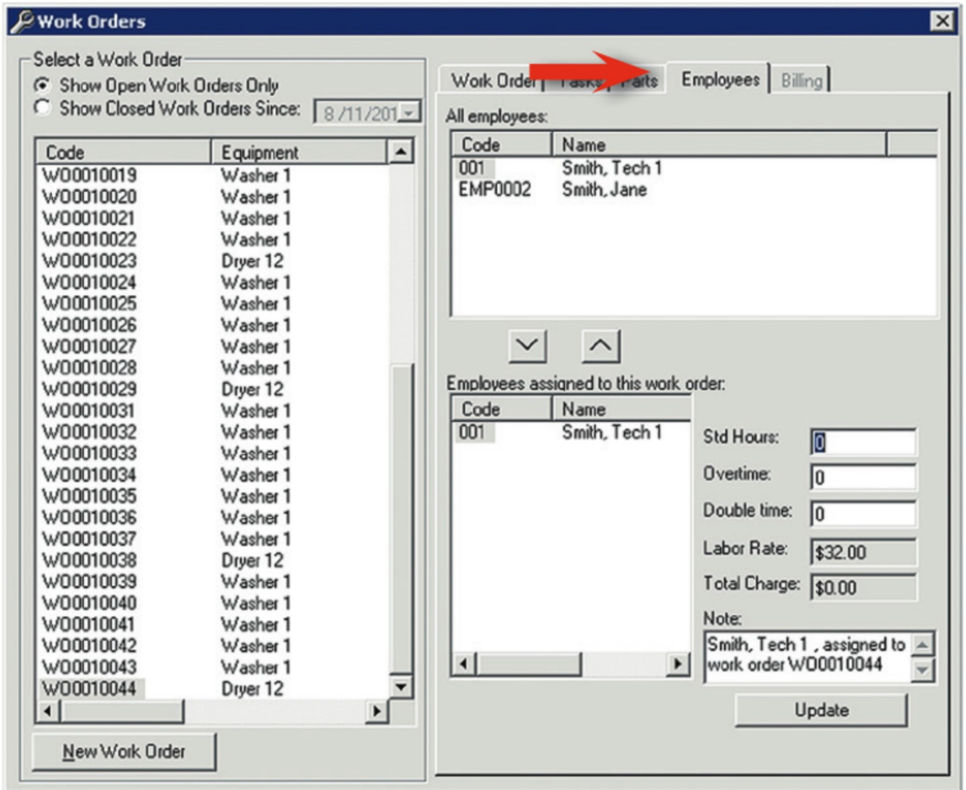


Figure 42. Work Orders: Employees dialog.

2. Select a work order for modification in the **Select a Work Order** frame.
3. Click the **Employees** tab (see Figure 42).
4. Select an employee in the **All Employees** list.
5. Click the **Add** button .
6. Add any employee-specific notes, and then click the **Update** button.

Adjust Employee Hours on a Work Order

PMTracker tracks the time spent by each employee on a particular work order. You can adjust the standard time, overtime, and double time spent by an employee anytime prior to closing a work order.

1. Click **EasyPath> Work with Work Orders** to access the *Work Orders* dialog.
2. Select a work order for modification in the **Select a Work Order** frame.
3. Click the **Employees** tab (see Figure 42).
4. Click to select an employee in the **Employees assigned to this work order** list.
5. Adjust the time in the fields to the right.
6. Click **Update**.

Remove Employees

1. Click **EasyPath> Work with Work Orders** to access the *Work Orders* dialog.
2. Select a work order for modification in the **Select a Work Order** frame.
3. Click the **Employees** tab (see Figure 42).
4. Select an employee in the **All Employees** List.
5. Click the **Remove** button .

Close a Work Order

You close a work order by setting the **Date Closed** on the *Work Order* dialog.

1. Click **EasyPath> Work with Work Orders** to access the *Work Orders* dialog.
2. Select a work order to modify in the **Select a Work Order** frame.
3. Locate the **Date Closed** field on the **Work Order** tab.
4. Check the box in the field to accept the current date, or click the drop-down to select a date (see Figure 43).
5. Verify that the downtime (**Work Order** tab), parts used (**Parts** tab), employee hours (**Employees** tab), and comment fields have appropriate values.
6. Click the **Close** button.

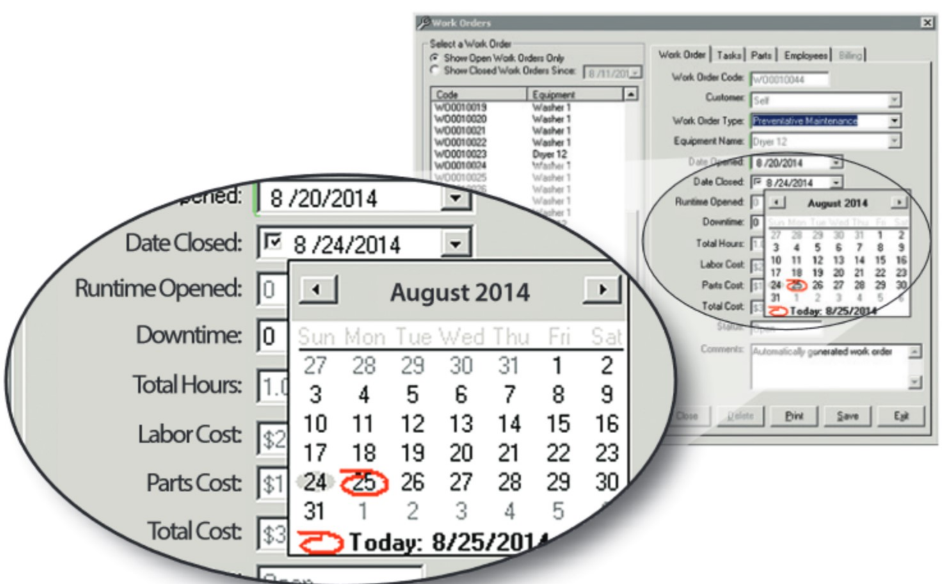


Figure 43. Work Orders: setting the **Date Closed.**

Purchasing

The ability to generate purchase requests is integrated into the PMTracker application. As employees complete work orders and use parts, the system recognizes the reduced inventory and issues purchase requests. Employees may also make purchase requests as they work with the inventory.

To access Purchasing click the **Purchasing** option on the EasyPath menu. If EasyPath isn't visible, click **EasyPath Screen** under the **View** menu. Purchasing has an EasyPath menu of its own (see Figure 44). From this screen you can approve and close purchase requests, manage your suppliers list, monitor and manage inventory, and produce purchasing reports.

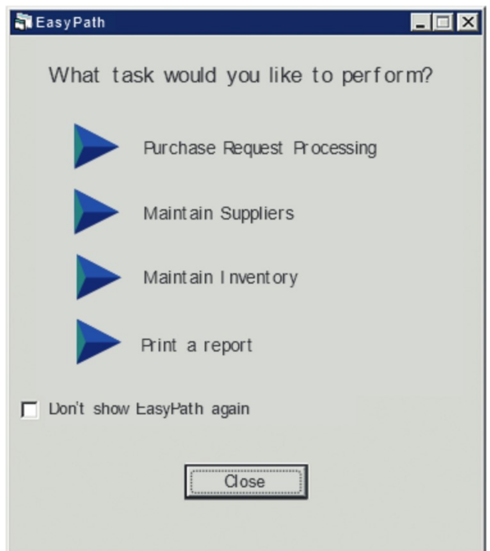


Figure 44. Purchasing EasyPath

Managing Purchase Requests

Purchase requests come from employees, and PMTracker generates requests based on the minimum in stock quantities you set earlier. You can accept the purchase requests or delete them.

Accepting Purchase Requests

To accept purchase requests:

1. Click **Purchasing** in *PMTracker EasyPath* to access the *Purchasing EasyPath*.
2. Click **Purchasing Request Processing** on the *Purchasing EasyPath* menu to open the *Purchasing Requisition Processing* dialog (see Figure 45).
3. Select a purchase request in the **Items to be Ordered** list.

4. Right click the selected request and select **New PR w/ Selected Item** (see Figure 45) to open the *Edit Purchase Requisition* screen (see Figure 46).

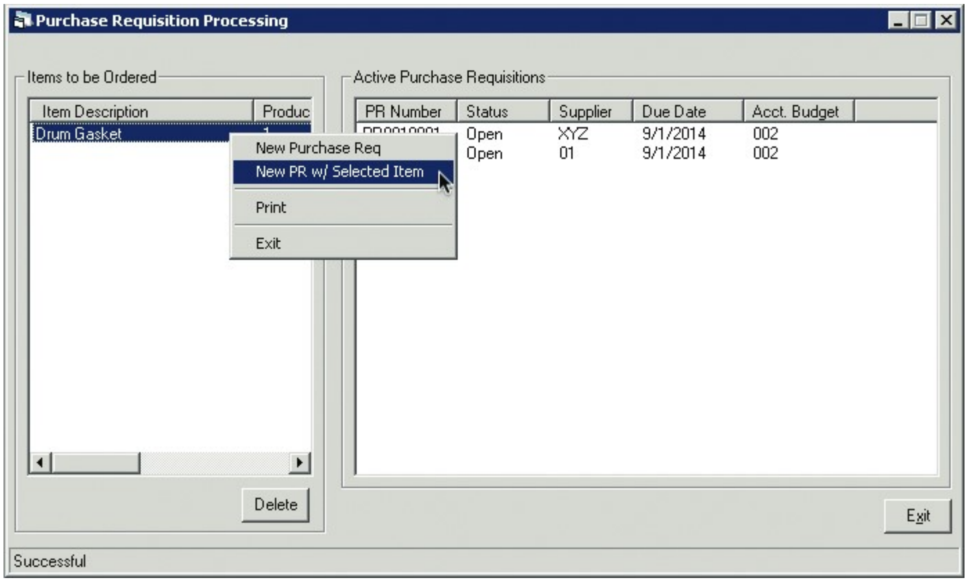


Figure 45. Purchase Requisition Processing.

5. Add an **Accounting Budget** type by clicking the selection button >>.

6. Click **Save** to generate the purchase requisition.

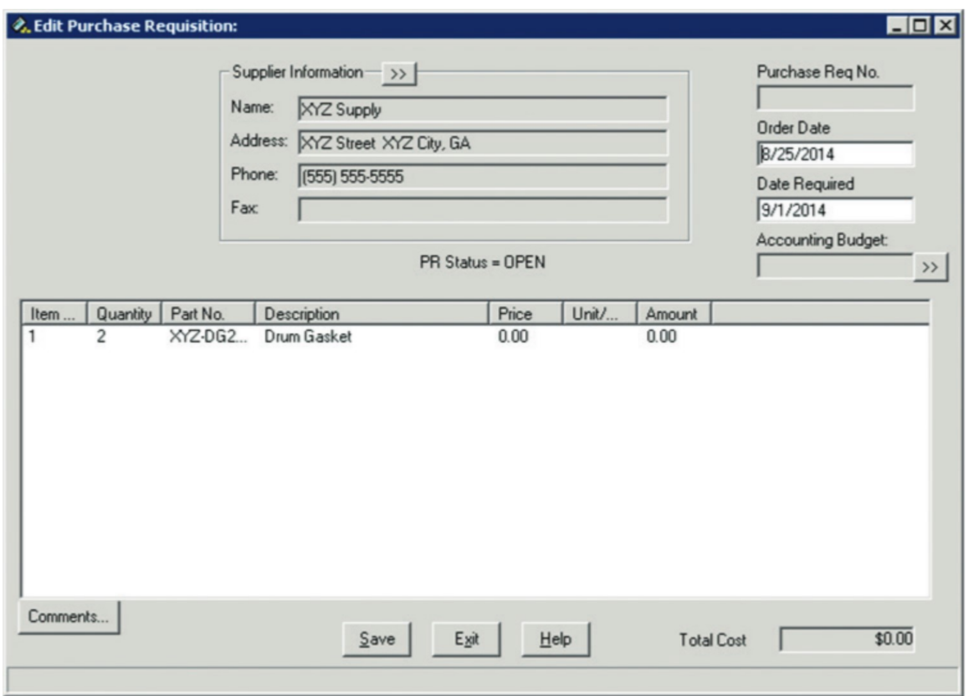


Figure 46. Edit Purchase Requisition.

Modify a Purchase Requisition

You have several options for the modification of a purchase requisitions. You can:

- Add, modify, and delete line items,
- Add shipping, taxes, and other associate costs,
- Add comments, and
- Delete purchase requisitions.

Modify a Purchase Requisition Line Item

To modify a line item double-click the line item in the *Edit Purchase Requisition* window to open the line items detail dialog (see Figure 46). Using the line item dialog you can adjust the **Quantity, Unit of Measure**, and **Price**; you can also add line item level comments (see Figure 47).

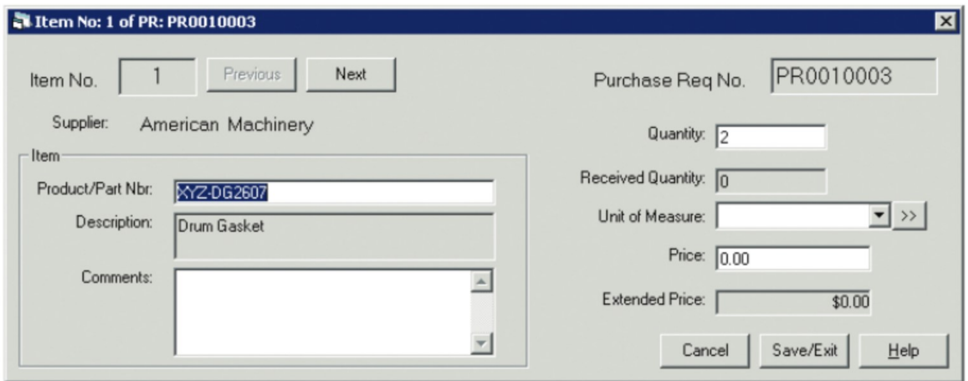


Figure 47. Line item detail.

Add Items to a Purchase Requisition or Combine Requisitions

If you need to order several different items from the same supplier, you can combine those items together in one purchase request. You can add the items from your parts inventory, or you can import them from other pending item purchase requests. To add additional items:

1. Right click inside the purchase request item list.

2. Select either **Add From Inventory** or **Add from Request List**.

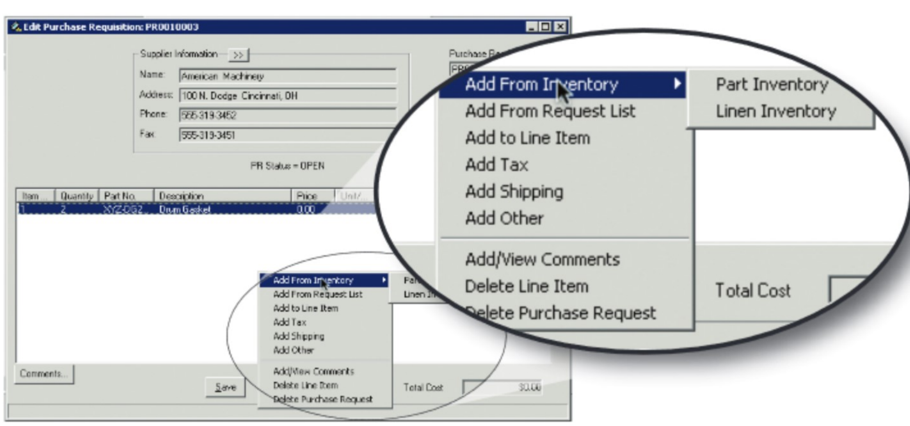


Figure 48. Purchase request right click menu..

Add From Inventory

The **Add From Inventory** option allows you to select an item from the parts or linen inventory. The system warns you if you select an item that is not available from the supplier.

Add From Request List

This option allows you to add other pending purchase requests. The system will warn you if the items aren't available from the purchase requisition's supplier.

Add to Line Item

This option allows you to increase the order quantity for a selected or highlighted line item. If you don't have a line item highlighted nothing happens when you select this option.

Add Tax or Shipping

Right click on the line item list to access options to add tax or shipping to a purchase request.

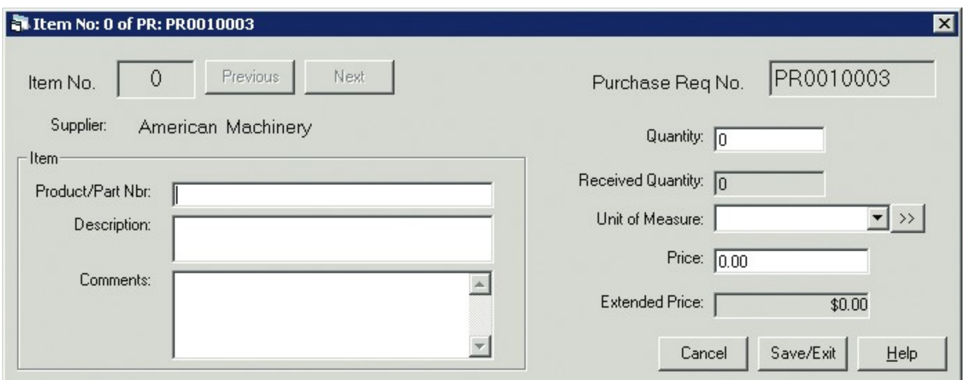


Figure 49. Add Other line item to a purchase order.

Add Other

You can add other items to your purchase request. The add other dialog allows you to add parts not currently in the inventory or services such as installation. You access the **Add Other** option using a right-click on the purchase request line item list.

Change Purchase Requisition Status: On Order, Received, Closed

Once you have consolidated and approved your purchase requests you need to change the status of the purchase request. Once the order is placed, you need to change the purchase requisition status "On Order" Status, change the requisition to received when it arrives, then finally close the requisition.

Change Purchase Requisition Status to On Order

Once you place the order, you need to change the status to "On Order." Once you change the status you can not change the items or item quantities. You can add tax, shipping cost, and comments while the requisition is in on order status. To change the purchase requisition's status:

1. Click **Purchasing** in *PMTracker EasyPath* to access the *Purchasing EasyPath*.
2. Click **Purchasing Request Processing** on the *Purchasing EasyPath* menu to open the *Purchasing Requisition Processing* dialog.
3. Double-click a purchase requisition in the **Active Purchase Requisitions** list.
4. Click the **Actions** menu in the main *Purchasing Requisition System* window (see Figure 50).
5. Click **Place On Order.**
6. Click **Yes** in the confirmation pop-up dialog.

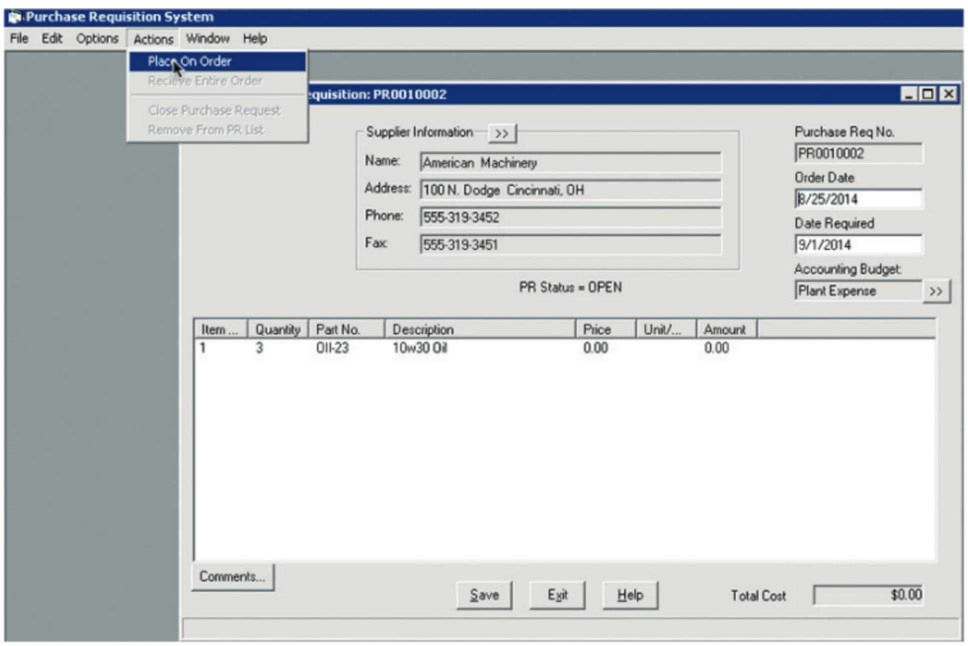


Figure 50. Purchase Requisition System: Actions—Place On Order.

Receiving the Order

When the order arrives you have the option of marking all the items as received or receiving them individually. Once you mark an item as received the system updates the on hand quantity in inventory. To receive the entire order:

1. Click **Purchasing** in *PMTracker EasyPath* to access the *Purchasing EasyPath*.

2. Click **Purchasing Request Processing** on the *Purchasing EasyPath* menu to open the *Purchasing Requisition Processing* dialog.

3. Double-click a purchase requisition with "on order" status in the **Active Purchase Requisitions** list.

4. Open the **Actions** menu on the *Purchase Requisition System* window.

5. Select **Receive Entire Order** (see Figure 51).

6. Select **Yes** in the confirmation dialog.

7. Select **Yes** in the next confirmation dialog to have the Purchase Requisition System close the purchase request.

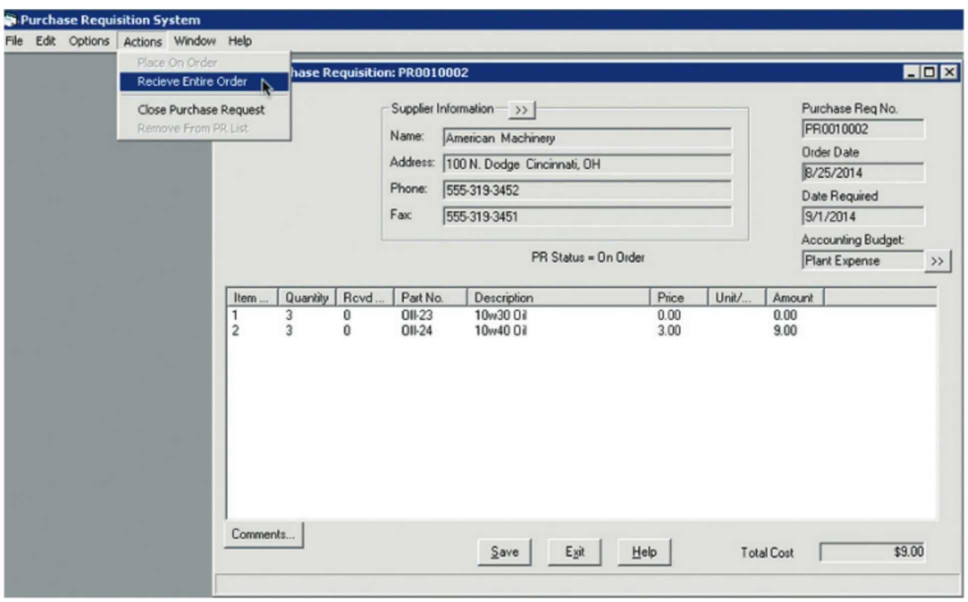


Figure 51. Purchase Requisition System: Actions—Receive Entire Order.

Receive an Order Item by Item

The order may arrive in multiple shipments, or the supplier back-ordered one or more of the items. Rather than waiting for the entire order to arrive, you can mark the individual items as received. This places the items into inventory without changing the status of the purchase requisition.

1. Click **Purchasing** in *PMTracker EasyPath* to access the *Purchasing EasyPath*.
2. Click **Purchasing Request Processing** on the *Purchasing EasyPath* menu to open the *Purchasing Requisition Processing* dialog.
3. Double-click a purchase requisition with the status “on order” in the **Active Purchase Requisitions** list.
4. Double-click a line item to open the *Item Detail* dialog.
5. Change the **Received Quantity** to reflect the actual number received (see Figure 52).
6. Click **Save/Exit**.
7. Click **Save** on the *Edit Purchase Requisition* screen.

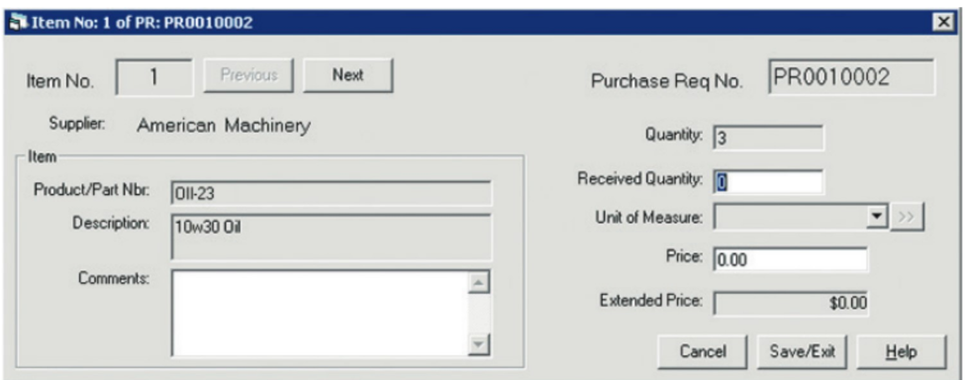


Figure 52. Purchase Requisition System: Actions—Receive Entire Order.

Close a Purchase Request

You can change a purchase requisition to closed at anytime. Regardless of the current status: open, on order, received. Once closed you cannot alter the purchase requisition. Although you can change price and add comments, you can not receive or modify the purchase requisition line items. To close a purchase requisition:

1. Click **Purchasing** in *PMTracker EasyPath* to access the *Purchasing EasyPath*.
2. Click **Purchasing Request Processing** on the *Purchasing EasyPath* menu to open the *Purchasing Requisition Processing* dialog.
3. Double-click a purchase requisition with the status “on order.”
4. Open the **Actions** menu on the *Purchase Requisition System* window.
5. Select **Close Purchase Request** (see Figure 53).
6. Select **Yes** in the confirmation dialog.

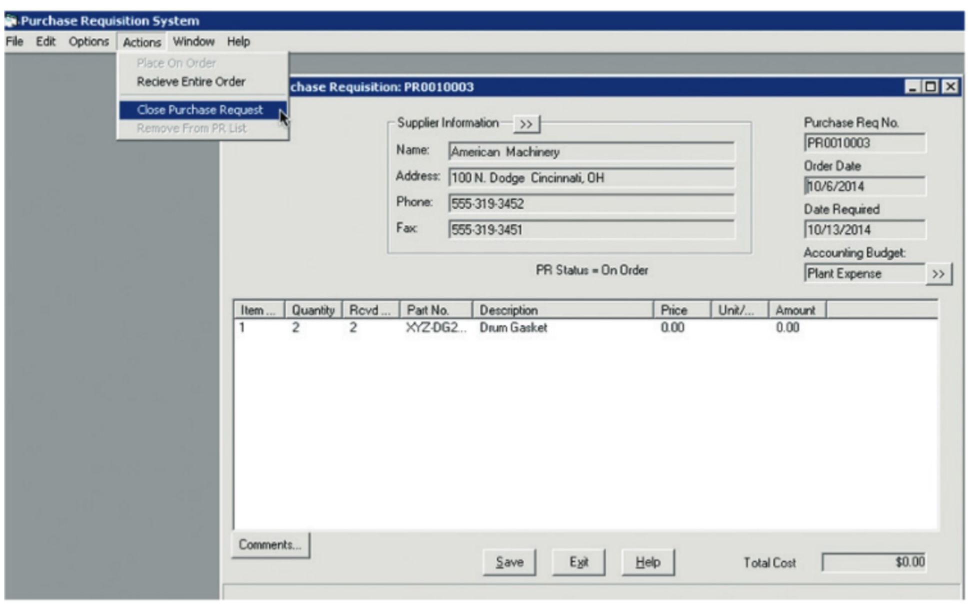


Figure 53. Purchase Requisition System: Actions—Close Purchase Request

Web Reports

With PM Tracker, you get a rich collection of reports that helps you to manage your maintenance tasks, purchase requests, work orders, and inventory. The system notifies you about inventory shortages and purchase requests, open work orders, and preventative maintenance tasks needing attention. During the installation of PM Tracker, the installers provided links and login information for PM Tracker Web Reports. If you need this information, contact Softrol support (see ”Support: Get Additional Help” on page 59).

The Web Reports Interface

Once logged in to PM Tracker web reports, you first arrive at the *Quick Links* page (see Figure 54). The interface consists of four main areas:

1. Reporting Dates: These dates apply to all reports unless the report has separate date selection options. Changing the dates and clicking **GO** applies the dates to your reports. Note: For illustration purposes the date frame was added to Figure 54

2. The Alert Icons and Logout icon: The alert icons show the number of open work orders, purchase requests, and part requests.

3. The PM Tracker Web Reports menu.

4. Report Frame.

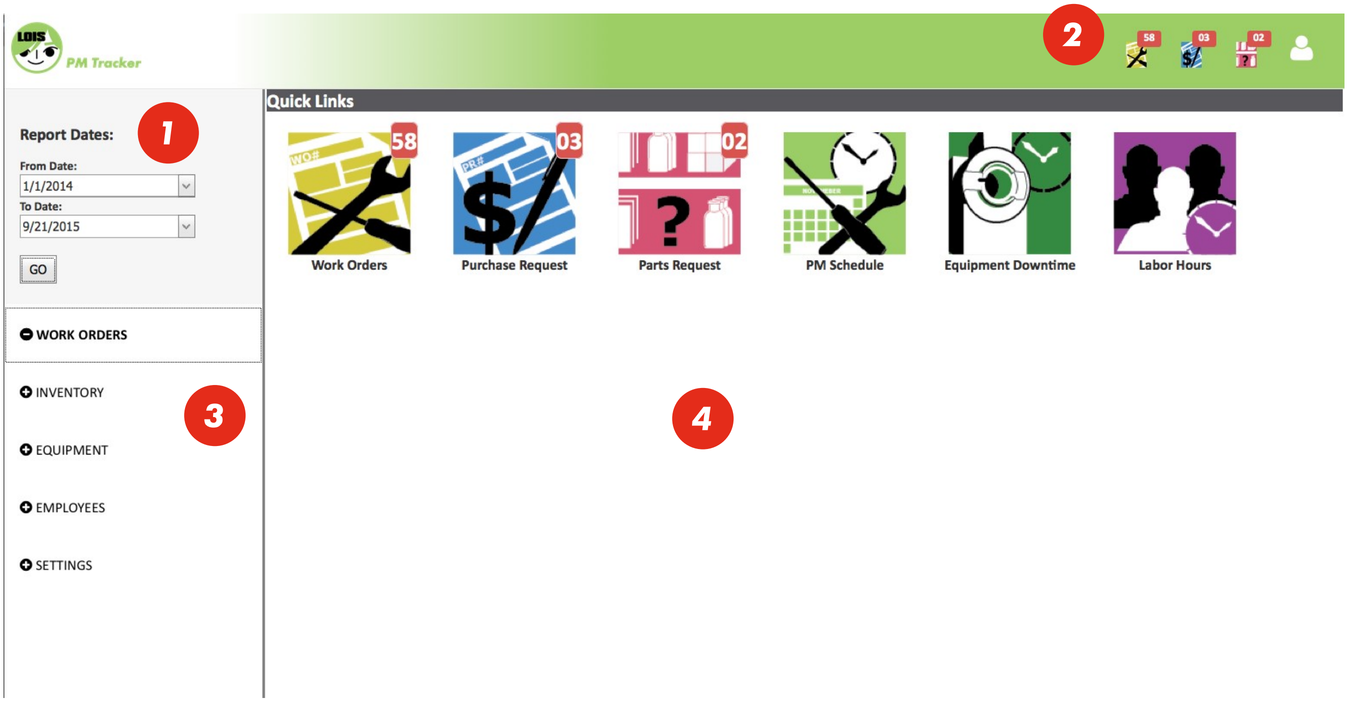


Figure 54. PM Tracker Web Reports: Quick Links

Quick Links

Quick Links serves as the PM Tracker Reports welcome page (see Figure 54). The page contains six icons that lead to the most frequently used reports in PM Tracker. The six icons link to:

- Work Orders,
- Purchase Requests,
- Parts Requests,
- PM Schedule,
- Equipment Downtime, and
- Labor Hours.

Three of the six icons include alerts. These alerts inform you that you have work orders, purchase requests, or part requests that need your attention.

Work Order Lookup

Work Order Lookup allows you to view open and closed work orders based on your date selection. Filter the work orders using the criteria section to refine your results. You can view any of the work order details by clicking on the work order ID (see Figure 55).

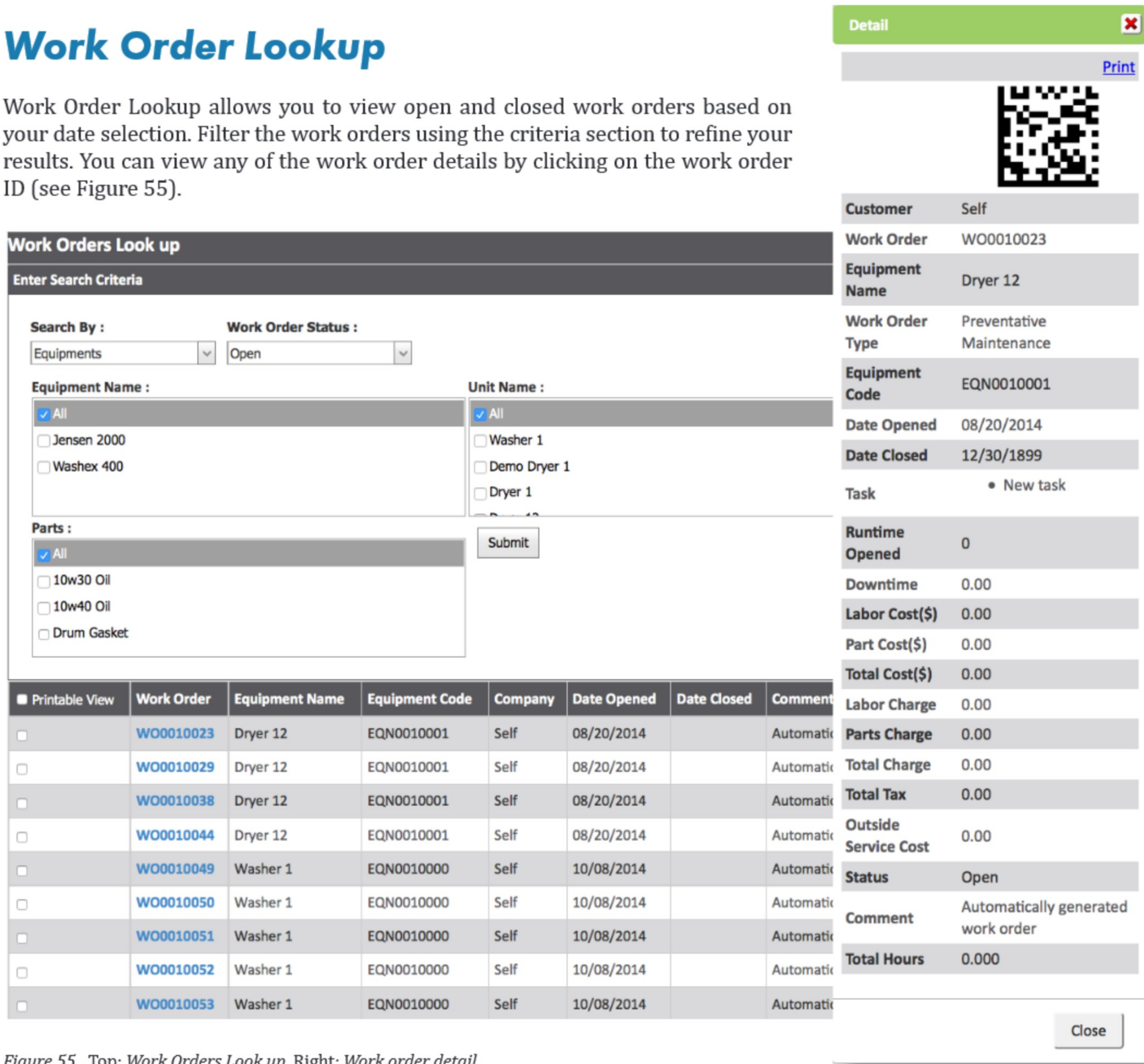


Figure 55. Top: *Work Orders Look up.* Right: *Work order detail..*

Work Order: Cost Summary

The Cost Summary Report gives you the maintenance costs on a per-machine basis for the date range selected. The report breaks down the data for the labor and part costs. It also includes the downtime and labor hours required to complete the work order. You can get work order details by clicking the work order number.

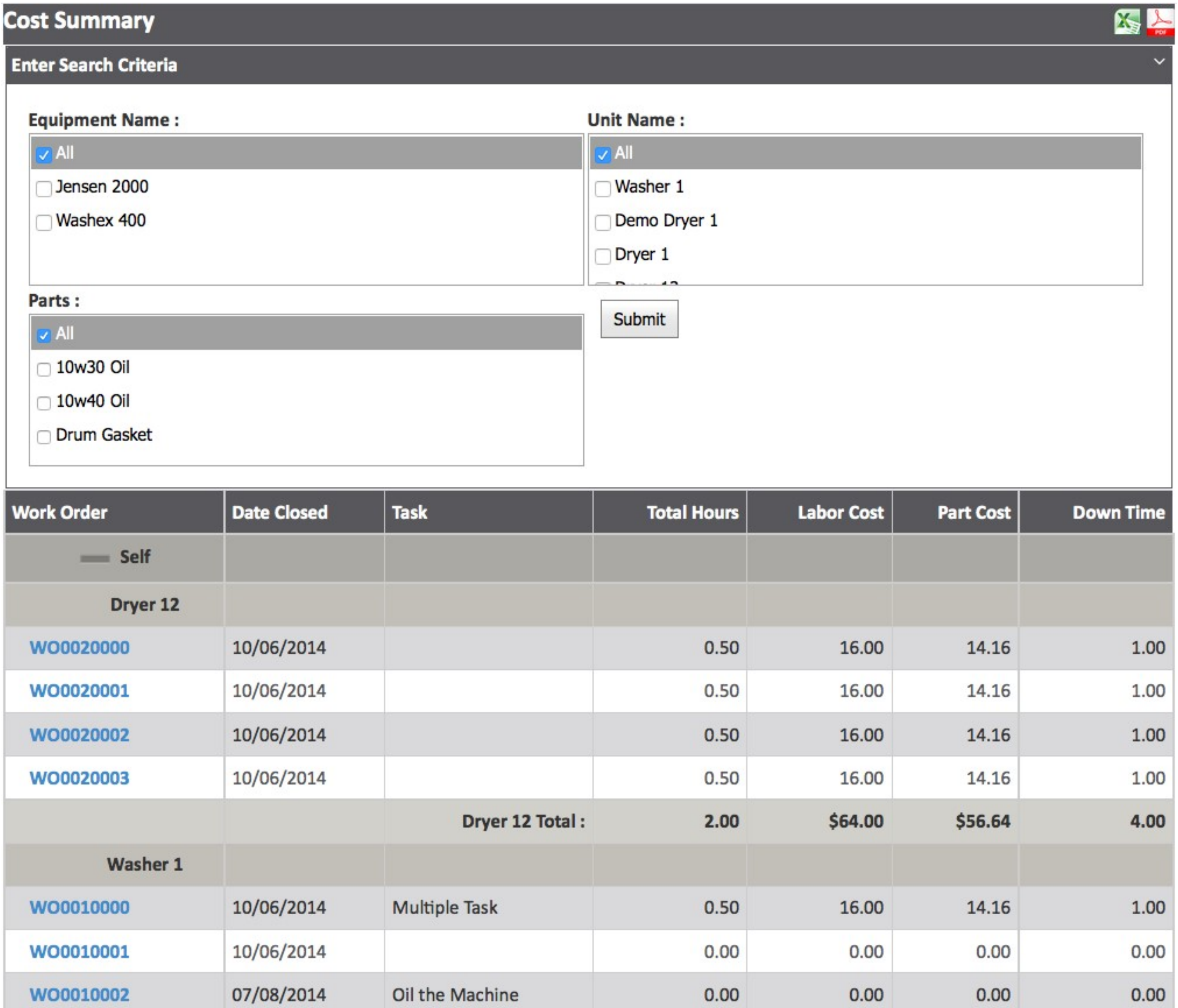


Figure 56. Work Orders: Cost Summary.

Inventory: Purchase Requests

The Purchase Requests report allows you to view your purchase requests. You can filter your results based on supplier, and purchase request status. The resulting data lists your purchase requests and some basic information about the request such as status, order date, required date, and cost. Clicking the **Purchase Request Number** generates the detail seen in the inset of Figure 57. You can generate a detailed, printable report by checking the box at the front of the row and then clicking the text, "**Printable View**" in the header (see Figure 58). From the Printable View use your browser's print functions to print the report. Alternatively, you can use the links at the top of either view to generate a spreadsheet or save the report to a PDF document.

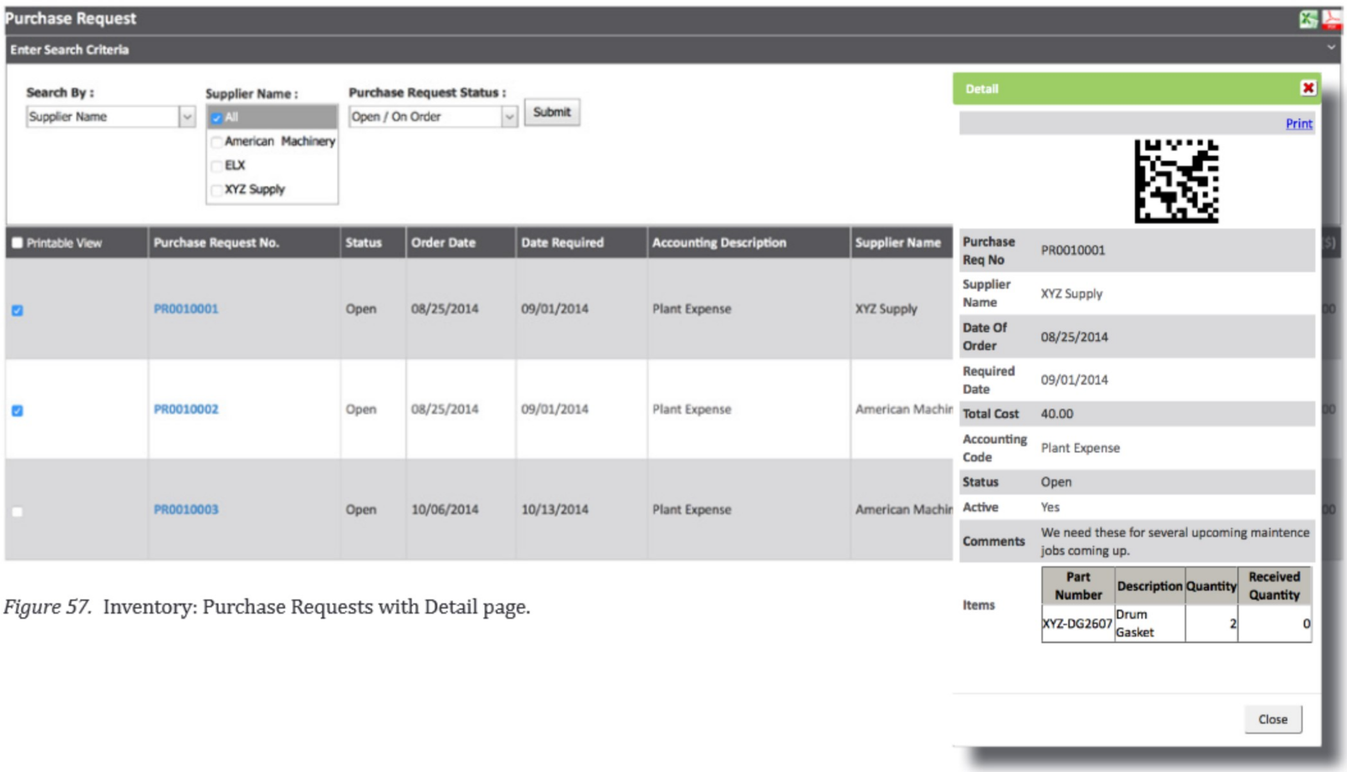


Figure 57. Inventory: Purchase Requests with Detail page.

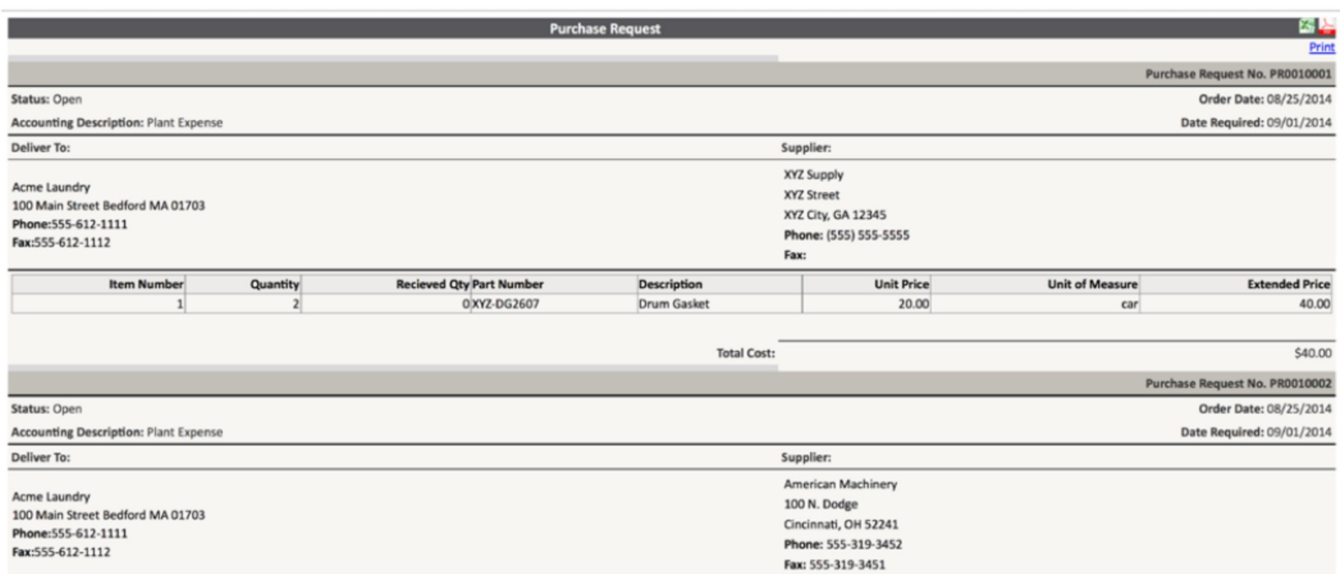
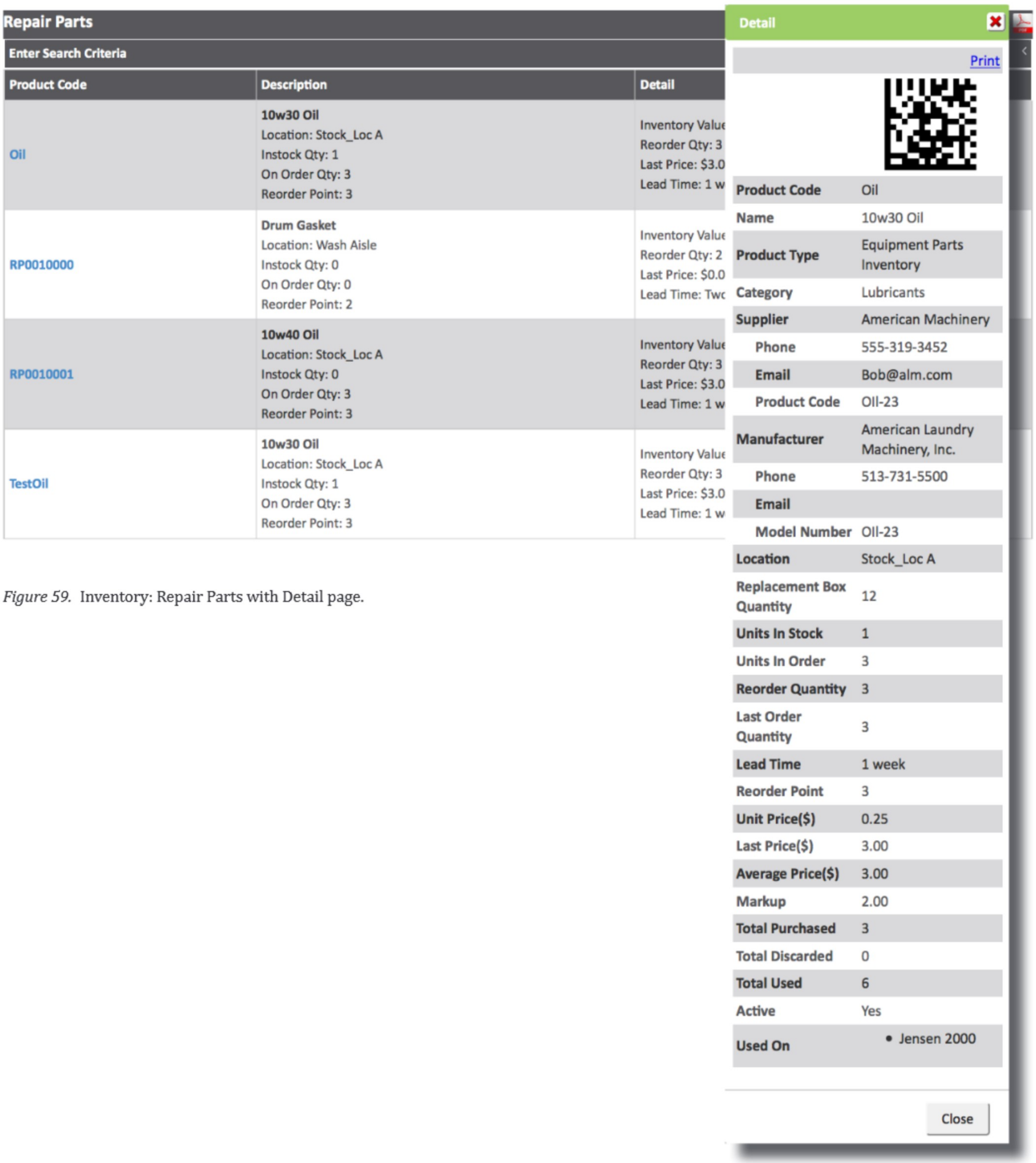


Figure 58. Inventory: Purchase Requests Printable View..

Inventory: Repair Parts

The Repair Parts report gives you a list of all of the parts in your system. You can see the current in-stock quantities, reorder points, price, and leadtimes. Clicking on the Product Code brings up the Detail window for additional information including supplier, manufacturer, and the equipment that uses the part.



Repair Parts

Enter Search Criteria

Product Code	Description	Detail
Oil	**10w30 Oil** Location: Stock_Loc A Instock Qty: 1 On Order Qty: 3 Reorder Point: 3	Inventory Value Reorder Qty: 3 Last Price: $3.0 Lead Time: 1 w
RP0010000	**Drum Gasket** Location: Wash Aisle Instock Qty: 0 On Order Qty: 0 Reorder Point: 2	Inventory Value Reorder Qty: 2 Last Price: $0.0 Lead Time: Two
RP0010001	**10w40 Oil** Location: Stock_Loc A Instock Qty: 0 On Order Qty: 3 Reorder Point: 3	Inventory Value Reorder Qty: 3 Last Price: $3.0 Lead Time: 1 w
TestOil	**10w30 Oil** Location: Stock_Loc A Instock Qty: 1 On Order Qty: 3 Reorder Point: 3	Inventory Value Reorder Qty: 3 Last Price: $3.0 Lead Time: 1 w

Detail

Print

Product Code	Oil
Name	10w30 Oil
Product Type	Equipment Parts Inventory
Category	Lubricants
Supplier	American Machinery
Phone	555-319-3452
Email	Bob@alm.com
Product Code	OIl-23
Manufacturer	American Laundry Machinery, Inc.
Phone	513-731-5500
Email	
Model Number	OIl-23
Location	Stock_Loc A
Replacement Box Quantity	12
Units In Stock	1
Units In Order	3
Reorder Quantity	3
Last Order Quantity	3
Lead Time	1 week
Reorder Point	3
Unit Price($)	0.25
Last Price($)	3.00
Average Price($)	3.00
Markup	2.00
Total Purchased	3
Total Discarded	0
Total Used	6
Active	Yes
Used On	• Jensen 2000

Close

Figure 59. Inventory: Repair Parts with Detail page.

Inventory: Suppliers

From the *Inventory: Suppliers* page you can view all of the suppliers in the system. By clicking the **Supplier Code**, you can access the supplier *Detail* window. The *Detail* window provides the same information with the addition of active status and any notes added to the supplier record. You can use the *Detail* window to print the supplier record (see Figure 60).

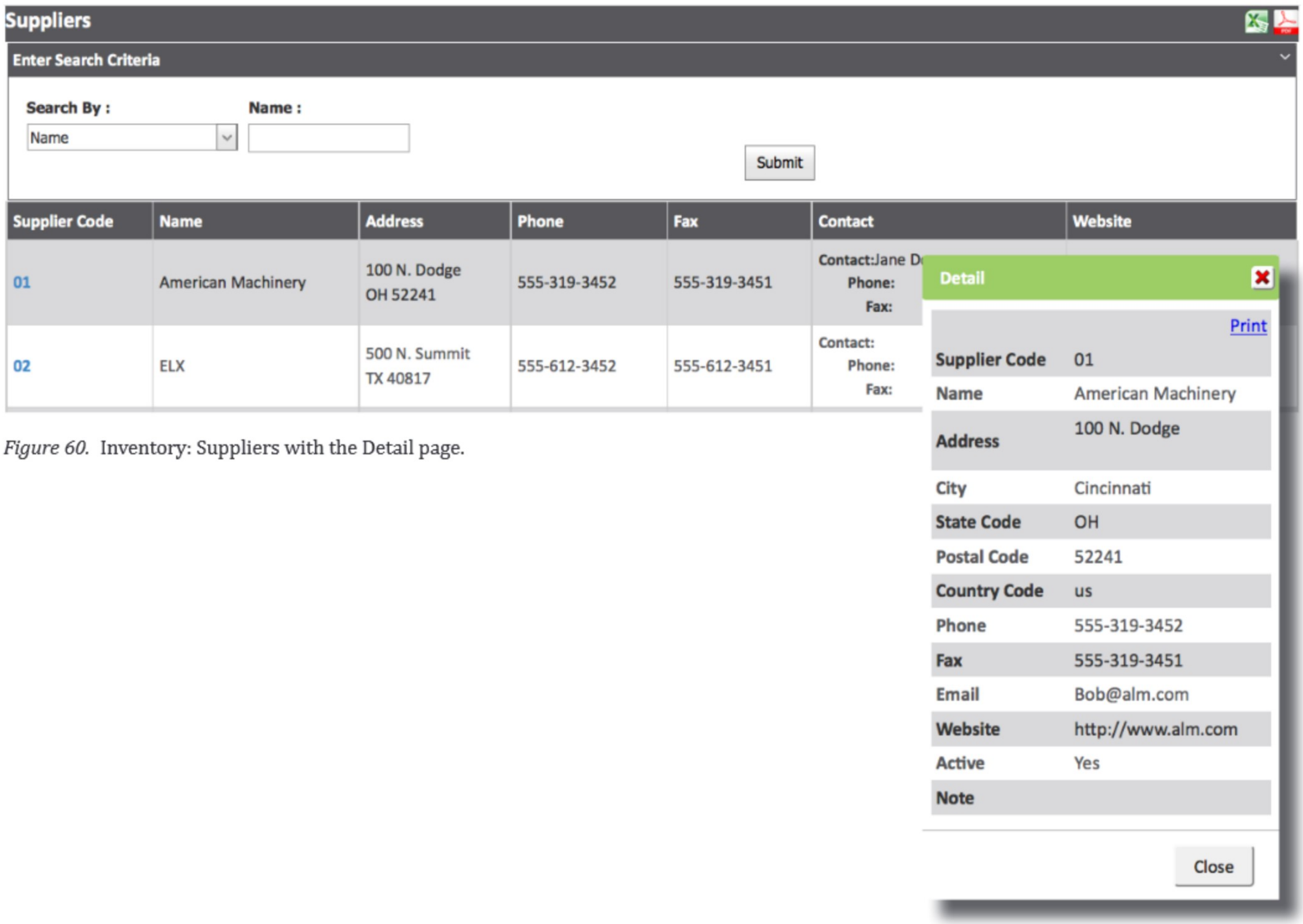


Figure 60. Inventory: Suppliers with the Detail page.

Reorder

Enter Search Criteria

Search By : Product Code | Product Code : | Submit

Product Code	Product Name	Supplier	Phone	Fax	Units in Stock	Units on Order	Reorder Quantity	Last Price($)
40-00093	HEATER ELEMENT, 480 VOLT	Felins	800-336-3220	414-355-7559	0	0	1	0.00
40-00116	FUSE, 30 AMP	Felins	800-336-3220	414-355-7559	0	0	3	0.00
40-00130	FUSE, 1 1/4 AMP	Felins	800-336-3220	414-355-7559	0	0	5	0.00
40-00132	FUSE 2 ½ AMP	Felins	800-336-3220	414-355-7559	0	0	1	0.00
40-00133	FUSE 6 ¼ AMP	Felins	800-336-3220	414-355-7559	0	0	5	0.00
40-00140	LIGHT BULB	Felins	800-336-3220	414-355-7559	0	0	2	0.00
40-00240	RELAY, HEATER ELEMENT	Felins	800-336-3220	414-355-7559	0	0	1	0.00
40-00505	MOTOR, TUNNEL FAN	Felins	800-336-3220	414-355-7559	0	0	1	0.00
40-00602	DRIVE, DC TUNNEL	Felins	800-336-3220	414-355-7559	0	0	1	0.00
30-00133	COGGED BELT, NEW, 17/22/30	Felins	800-336-3220	414-355-7559	0	0	1	0.00
30-00170	BELT, TEFLON MESH, 22 X 6FT	Felins	800-336-3220	414-355-7559	0	0	1	0.00
3203-431	BELT IDLER ROLL W/2 BEARINGS	Chicago Dryer Company	(773) 235-4430	(773) 235-4439	0	0	1	0.00
3203-433	IDLER ROLL 2-1/4"x36-1/2"x11GA W/12 RING	Chicago Dryer Company	(773) 235-4430	(773) 235-4439	0	0	1	0.00
3203-436	IDLER ROLL 2-1/4"x42"x11 GA W/12 RINGS	Chicago Dryer Company	(773) 235-4430	(773) 235-4439	0	0	1	0.00
3203-446	EXIT CONVEYOR IDLER ROLL W/TRACKING TAPE	Chicago Dryer Company	(773) 235-4430	(773) 235-4439	0	0	1	0.00
3204-065	IDLER ROLL 4-1/2"x16"x16 GA W/6 RINGS	Chicago Dryer Company	(773) 235-4430	(773) 235-4439	0	0	1	0.00

Detail

Print

Product Code	0208-412
Name	BRKT PIVOT AIR CYLINDER 2" BORE
Product Type	Equipment Parts Inventory
Category	Other
Supplier	Chicago Dryer Company
Phone	(773) 235-4430
Email	
Product Code	0208-412
Manufacturer	Chicago Dryer Company
Phone	(773) 235-4430
Email	
Model Number	0208-412
Location	
Replacement Box Quantity	1
Units In Stock	0
Units In Order	1
Reorder Quantity	1
Last Order Quantity	1
Lead Time	
Reorder Point	1
Unit Price($)	0.00
Last Price($)	0.00
Average Price($)	0.00
Markup	1.00
Total Purchased	0
Total Discarded	0
Total Used	0
Active	Yes
Used On	• Chicago Flatwork Separator Machine

Close

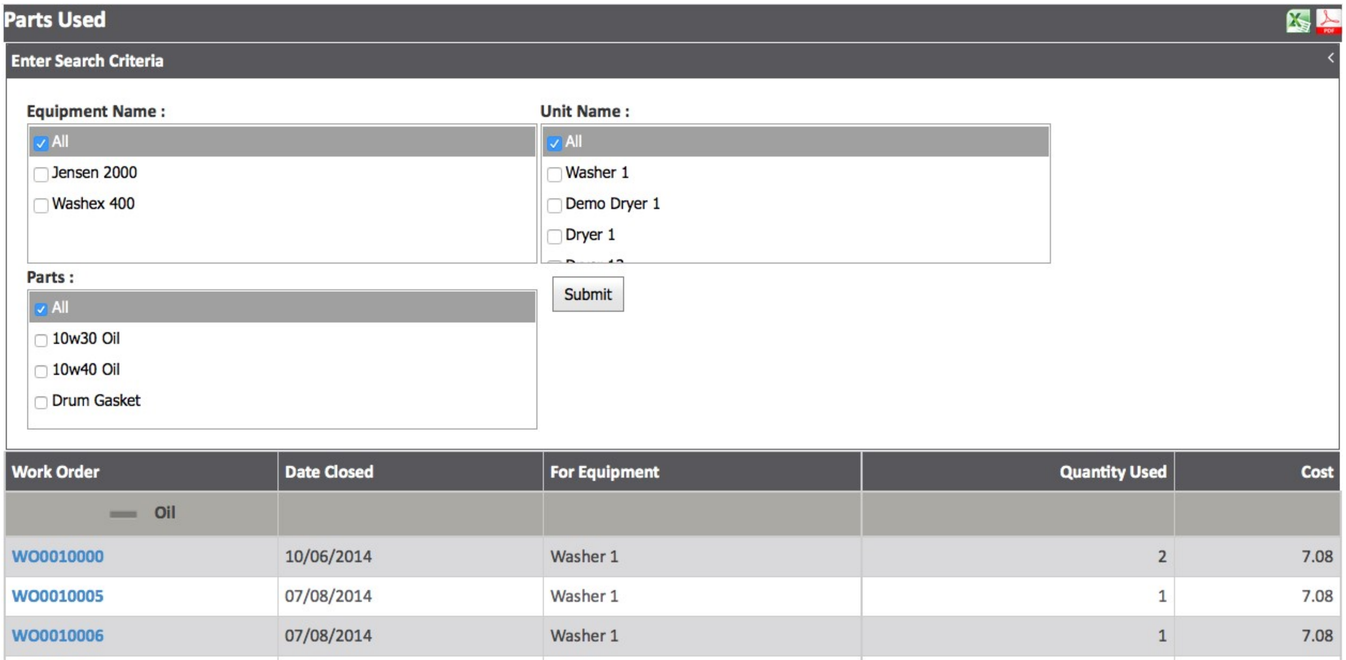
Figure 61. Inventory: Reorder with the product Detail.

Inventory: Reorder

The Inventory Reorder report gives you a list of the parts that fell to or below their reorder point. If the **Reorder Quantity** and the **Units on Order** both equal zero, you know you need to order the part (see Figure 61).

Inventory: Parts Used

The *Parts Used* page, allows you to view all of the parts used by service technicians for the specified date range. You can refine your report by specifying the types of equipment, units, or the individual parts. You can get detailed information about what tasks the parts and when the parts were used. Clicking on the **Work Order** number opens the *Work Order Detail*.

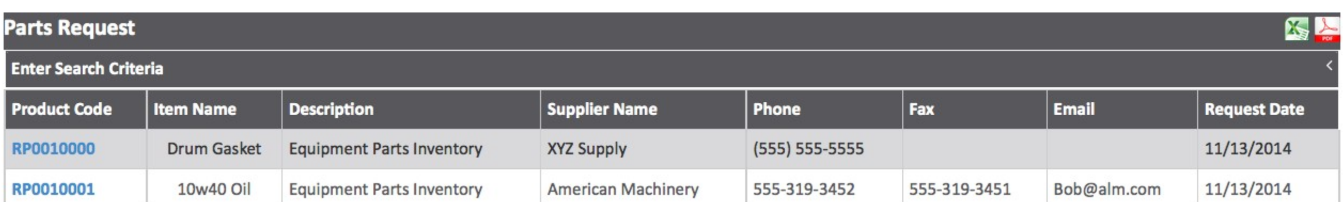


Work Order	Date Closed	For Equipment	Quantity Used	Cost
— Oil				
WO0010000	10/06/2014	Washer 1	2	7.08
WO0010005	07/08/2014	Washer 1	1	7.08
WO0010006	07/08/2014	Washer 1	1	7.08

Figure 62. Inventory: Parts Used.

Inventory: Parts Request

The Parts Request report displays all of the part requests made for the specified date range. Clicking the **Product Code** opens the Parts Request Detail. The detail page provides the inventory history for the part, what equipment uses the part, the request status, and manufacturer's information.



Product Code	Item Name	Description	Supplier Name	Phone	Fax	Email	Request Date
RP0010000	Drum Gasket	Equipment Parts Inventory	XYZ Supply	(555) 555-5555			11/13/2014
RP0010001	10w40 Oil	Equipment Parts Inventory	American Machinery	555-319-3452	555-319-3451	Bob@alm.com	11/13/2014

Figure 63. Inventory: Parts Requests.

Equipment: Equipment Look Up

The *Equipment Look Up* page allows you to view the current status of all of your tracked equipment. The report divides the equipment by model and then lists each unit separately. You can check on the last service date, and the number of hours ran since the last service. Clicking on the **Model Code** generates the Equipment Detail that gives you the manufacturer and technical details and supplier information for the model (see Figure 64).

Equipment Look up

Enter Search Criteria

Search By : Model Code **Model Code:**

Submit

	Model Code	Description	Equipment Type	Manufacturer	Warranty	Model Number	Voltage	Phase	Amps
PM Plan	EQ0010000	Jensen 2000	Washer	American Laundry Machinery, Inc.	none	01	0	0	0

Unit No.	Unit Name	Location	Serial NO.	Install Date	Purchase Price($)	Total Runtime	Last Maintenance
EQN0010000	Washer 1	Wash Aisle 1	12112121	07/02/2014	0.00	2123	10/08/2014
EQN0010002	Washer 2			08/19/2014	0.		

	Model Code	Description	Equipment Type	Manufacturer	Warranty	Model Number	Voltage	Phase	Amps
PM Plan	EQ0010001	Washex 400	Ironer	American Laundry Machinery, Inc.	none				0

Unit No.	Unit Name	Location	Serial NO.	Install Date	Purchase Price(
EQN0010001	Dryer 12			07/09/2014	0.
EQN0010003	Dryer 1			08/19/2014	0.
EQN0010004	Demo Dryer 1			08/19/2014	0.

Detail

Print

Equipment Code	EQ0010000
Description	Jensen 2000
Manufacture Code	alm
Equipment Type	Washer
Supplier Code	01
Supplier Name	American Machinery
Supplier Phone	555-319-3452
Supplier Email	Bob@alm.com
Supplier Web Address	http://www.alm.com
Warranty	none
Model Number	01
Voltage	0
Phase	0
Amps	0
Active	Yes

Close

Figure 64. Inventory: Equipment Look Up with Equipment Detail.

Clicking on the hyper link, **PM Plan,** opens the *Maintenance Plan Report* where you can get the details about the required maintenance for the equipment (see "" on page 54).

Equipment: Types

The *Equipment Types* screen lists all of your equipment types defined in the system. Clicking on the Description opens the Equipment Lookup report displaying all of your equipment of that type (see Figure 65).

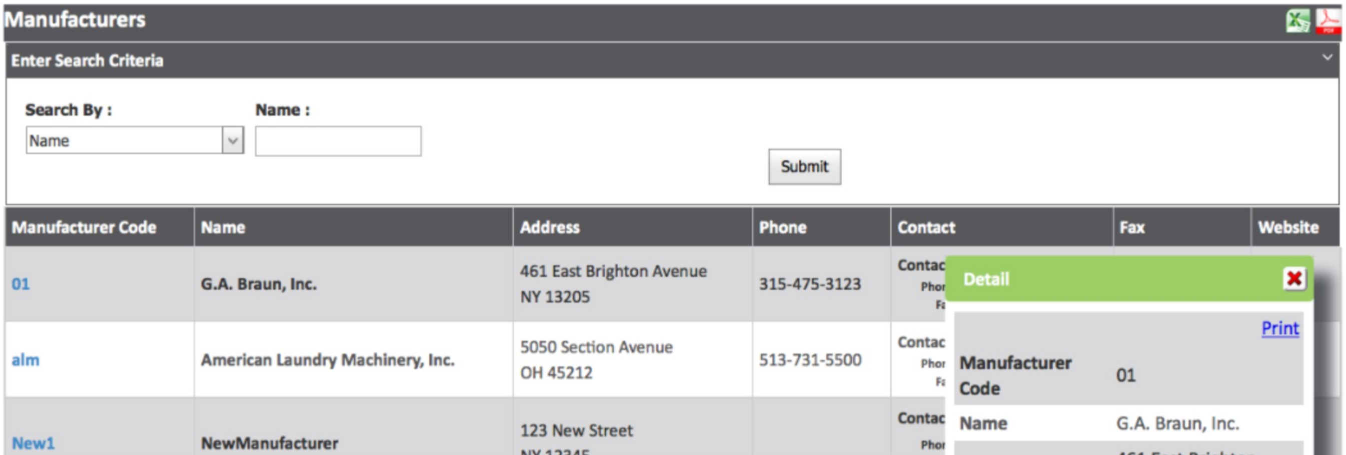
Types

Description	Type Code
Dryer	Dryer
Ironer	Ironer

Figure 65. Equipment: Equipment Types.

Equipment: Manufactures

The *Equipment Manufactures* page allows you to view all of the equipment manufactures in your system. The Manufactures Detail provides email, and any notes on the manufacturer (see Figure 66).



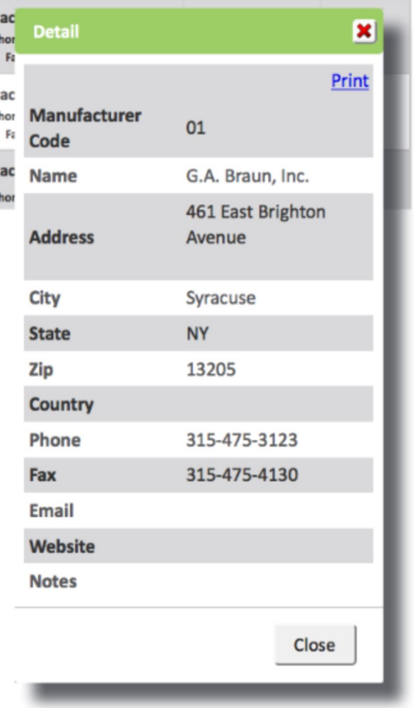


Figure 66. Equipment: Manufactures with Detail.

Equipment: Maintenance Plan

The *Maintenance Plan* displays the regularly scheduled maintenance for your equipment (see Figure 67). The system divides the returned maintenance tasks into groups based on the equipment model. The report tells you all of the tasks, the type of task, service type, and frequency for the maintenance task. The **Active Code** tells you the status of the task. Active tasks receive a "1," and inactive tasks receive a "0." Clicking the **Equipment Code** brings up the *Equipment Detail*.

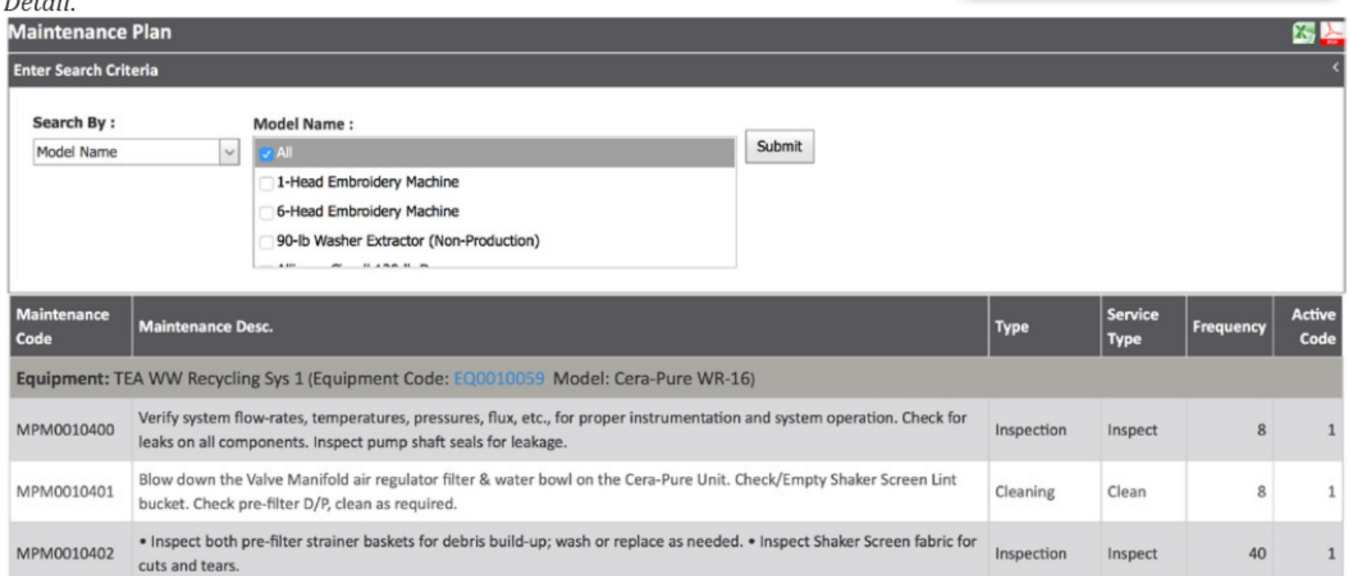


Figure 67. Equipment: Maintenance Plan

Equipment: PM Status

The PM Status page lists your equipment, maintenance tasks for the equipment, how frequently they need to occur, and the last completion date for the PM tasks (see Figure 68). The system groups your data based on the piece of equipment. Clicking on "+" or "-" sign in the header row expands and collapses the report.

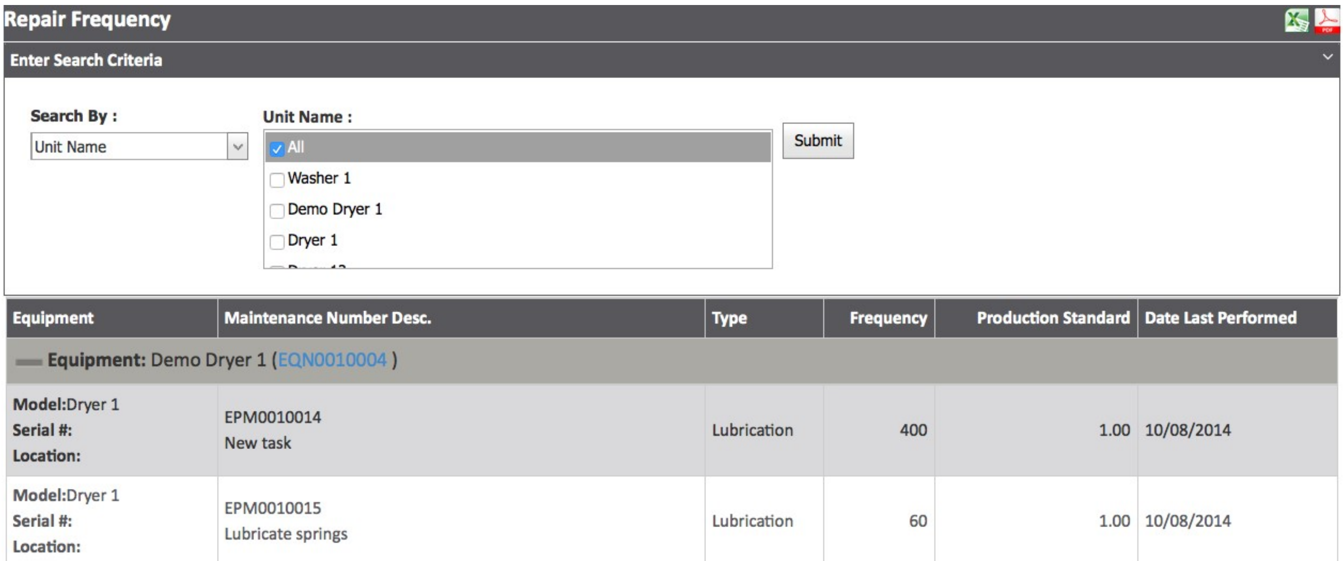


Figure 68. Equipment: Repair Frequency

Equipment: Preventive Maintenance

The PM Status Report gives preventive maintenance information for the individual piece of equipment. In contrast, the Preventive Maintenance Report lists all of the preventive maintenance tasks associated with a model (see Figure 69).

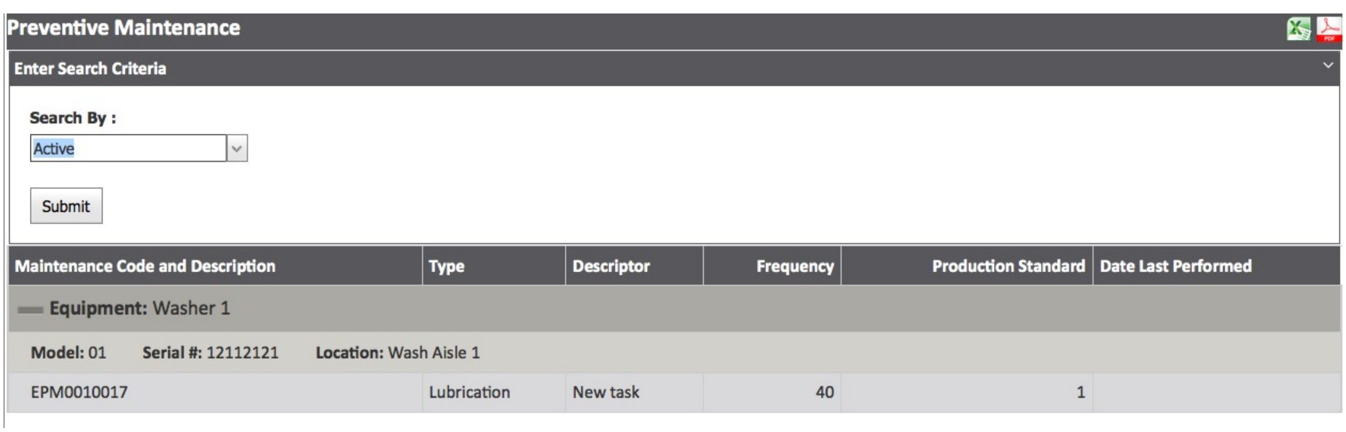
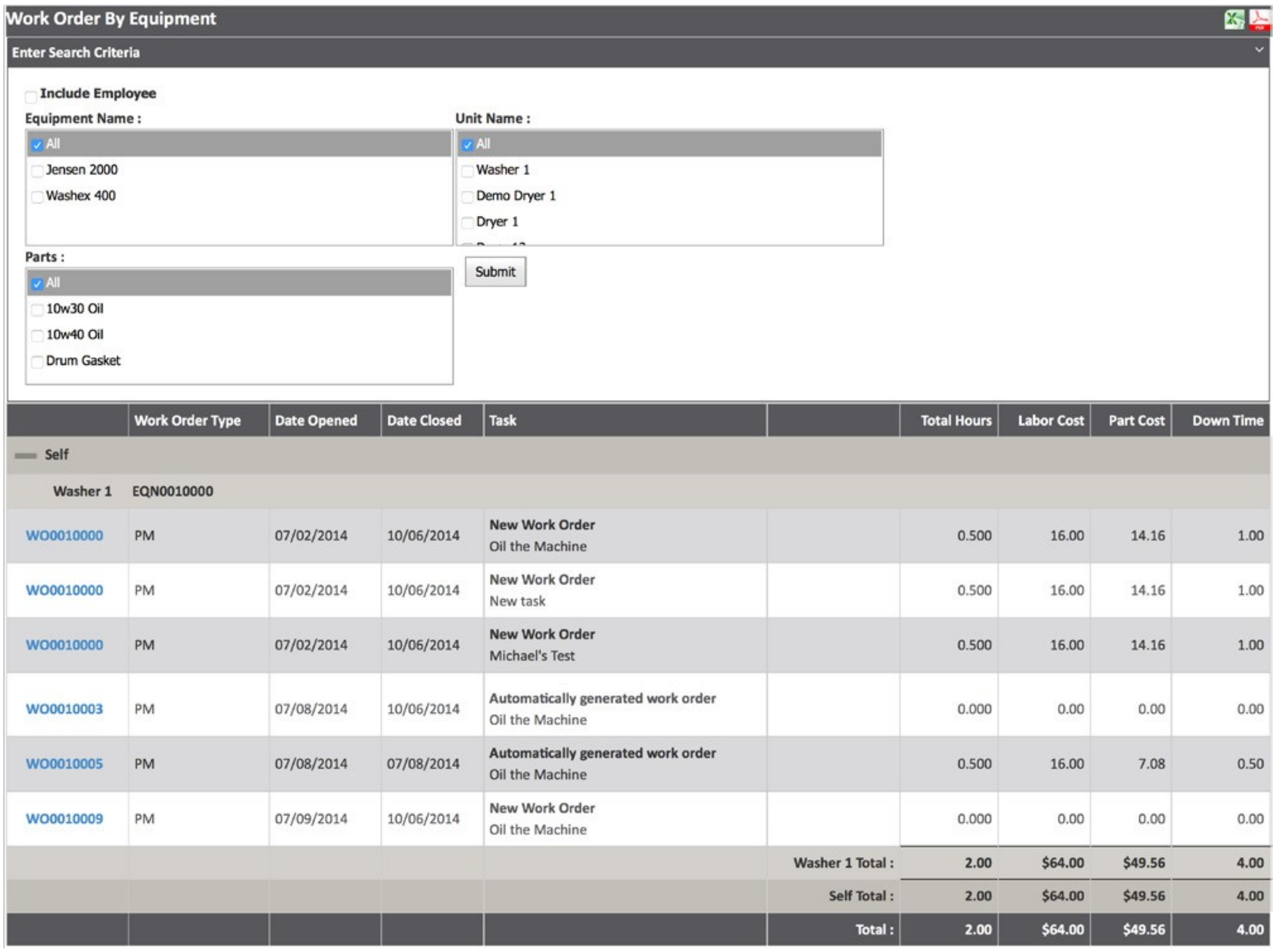


Figure 69. Equipment: Preventive Maintenance Schedule.

Equipment: Work Order History by Equipment

The Work Order History by Equipment separates your work orders into groups based on the piece of equipment. You can fine-tune your results by adjusting your date selection and the search criteria. The system organizes the results by customer. If you do not have external customers, the report may display a customer called “Self” (see Figure 70).


Work Order By Equipment

Enter Search Criteria

Include Employee

Equipment Name : All, Jensen 2000, Washex 400

Unit Name : All, Washer 1, Demo Dryer 1, Dryer 1

Parts : All, 10w30 Oil, 10w40 Oil, Drum Gasket

Submit

	Work Order Type	Date Opened	Date Closed	Task		Total Hours	Labor Cost	Part Cost	Down Time
Self									
Washer 1	EQN0010000								
WO0010000	PM	07/02/2014	10/06/2014	New Work Order Oil the Machine		0.500	16.00	14.16	1.00
WO0010000	PM	07/02/2014	10/06/2014	New Work Order New task		0.500	16.00	14.16	1.00
WO0010000	PM	07/02/2014	10/06/2014	New Work Order Michael's Test		0.500	16.00	14.16	1.00
WO0010003	PM	07/08/2014	10/06/2014	Automatically generated work order Oil the Machine		0.000	0.00	0.00	0.00
WO0010005	PM	07/08/2014	07/08/2014	Automatically generated work order Oil the Machine		0.500	16.00	7.08	0.50
WO0010009	PM	07/09/2014	10/06/2014	New Work Order Oil the Machine		0.000	0.00	0.00	0.00
					Washer 1 Total :	2.00	$64.00	$49.56	4.00
					Self Total :	2.00	$64.00	$49.56	4.00
					Total :	2.00	$64.00	$49.56	4.00

Figure 70. Equipment: Work Order by Equipment.

Equipment: Equipment Downtime

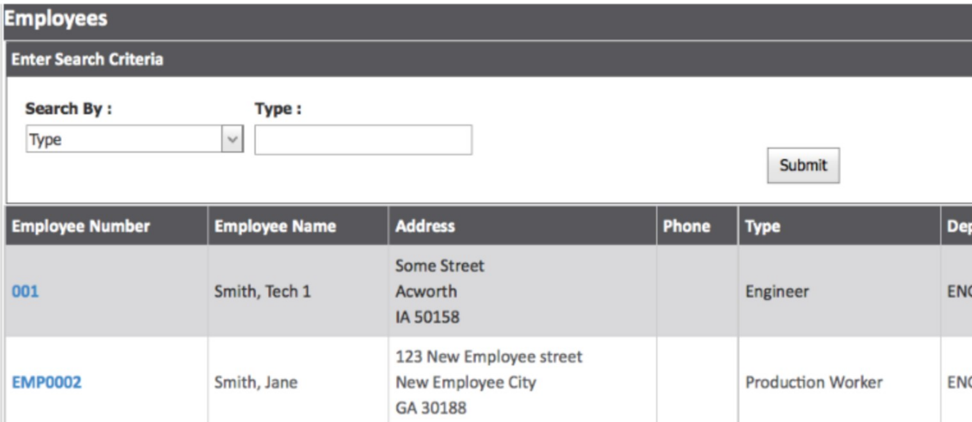
The *Equipment Downtime* report allows you to view the total downtime, employee hours, labor costs, and parts costs for a particular piece of equipment for your selected date range. The report places the data in groupings based on the customer and the machine (see Figure 71).

Equipment Down Time							
WO Number	**Description**	**Date Opened**	**Date Closed**	**Total Hours**	**Labor Cost**	**Part Cost**	**Down Time**
Self							
Jensen 2000							
Washer 1 (EQN0010000)							
WO0010045	Break Down	10/07/2014	10/08/2014	0.000	0.00	0.00	2.00
WO0010000	Preventative Maintenance	07/02/2014	10/06/2014	0.500	16.00	14.16	1.00
WO0010005	Preventative Maintenance	07/08/2014	07/08/2014	0.500	16.00	7.08	0.50
WO0010006	Break Down	07/08/2014	07/08/2014	1.000	32.00	7.08	0.50
			Washer 1 Total :	**2.00**	**$64.00**	**$28.32**	**4.00**
			Jensen 2000 Total :	**2.00**	**$64.00**	**$28.32**	**4.00**
Washex 400							
Dryer 12 (EQN0010001)							
WO0020000	Preventative Maintenance	07/02/2014	10/06/2014	0.500	16.00	14.16	1.00
WO0020001	Preventative Maintenance	07/02/2014	10/06/2014	0.500	16.00	14.16	1.00
WO0020002	Preventative Maintenance	07/02/2014	10/06/2014	0.500	16.00	14.16	1.00
WO0020003	Preventative Maintenance	07/02/2014	10/06/2014	0.500	16.00	14.16	1.00
			Dryer 12 Total :	**2.00**	**$64.00**	**$56.64**	**4.00**
			Washex 400 Total :	**2.00**	**$64.00**	**$56.64**	**4.00**
			Self Total:	**4.00**	**$128.00**	**$84.96**	**8.00**
			All Total :	**4.00**	**$128.00**	**$84.96**	**8.00**

Figure 71. Equipment: Equipment Downtime.

Employees

The *Employees* page gives you a list of all of your staff. This is typically restricted to maintenance staff, but if your production staff participates in the maintenance tasks, you may choose to include them as well. Clicking on the **Employee Number** brings up the employee Detail (see Figure 72).



Employees

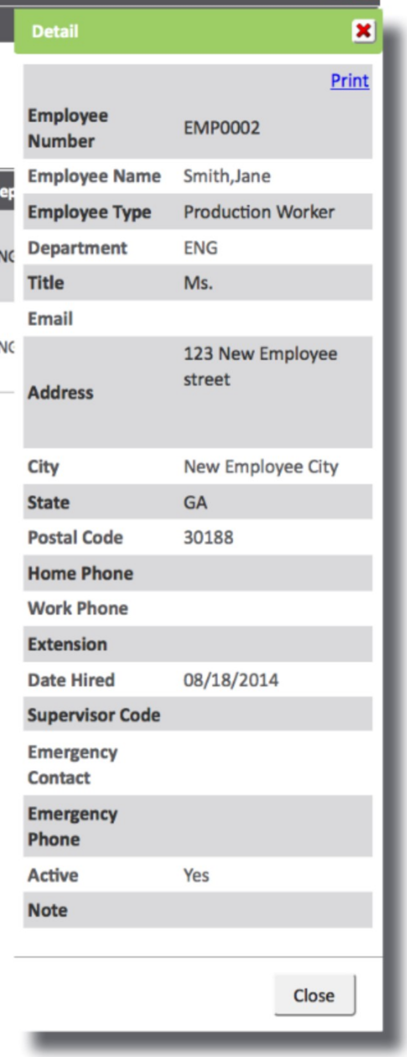
Enter Search Criteria

Search By : Type

Type :

Submit

Employee Number	Employee Name	Address	Phone	Type	Dep
001	Smith, Tech 1	Some Street Acworth IA 50158		Engineer	ENG
EMP0002	Smith, Jane	123 New Employee street New Employee City GA 30188		Production Worker	ENG



Detail

Print

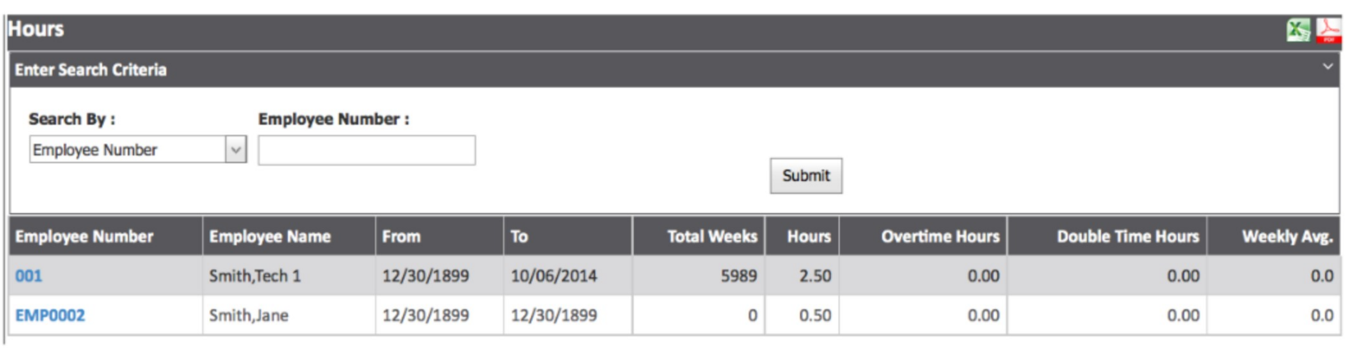
Employee Number	EMP0002
Employee Name	Smith,Jane
Employee Type	Production Worker
Department	ENG
Title	Ms.
Email	
Address	123 New Employee street
City	New Employee City
State	GA
Postal Code	30188
Home Phone	
Work Phone	
Extension	
Date Hired	08/18/2014
Supervisor Code	
Emergency Contact	
Emergency Phone	
Active	Yes
Note	

Close

Figure 72. Employees with Detail.

Employees: Hours

The Hours Report allows you to see the time spent by employees on preventive maintenance tasks. The report provides the total hours, overtime, and double time hours the employees spent on preventive maintenance tasks. Clicking on the Employee Number brings up the Employee Detail. The Related Work Orders link opens the Work Orders Detail Report. (see Figure 73).



Hours

Enter Search Criteria

Search By : Employee Number

Employee Number :

Submit

Employee Number	Employee Name	From	To	Total Weeks	Hours	Overtime Hours	Double Time Hours	Weekly Avg.
001	Smith,Tech 1	12/30/1899	10/06/2014	5989	2.50	0.00	0.00	0.0
EMP0002	Smith,Jane	12/30/1899	12/30/1899	0	0.50	0.00	0.00	0.0

Figure 73. Employees: Hours.

Support: Get Additional Help

If you find yourself in the need for help with the process, you have several support options:

Web Support

Visit the Softrol Support website (support.softrol.com) to get current documentation. With your support login you will find:

- Product manuals,
- FAQ, and
- Update downloads.

Telephone Support

Call 1-877- 241-7679 for Softrol's technical support. Site License Number may be necessary to receive support.

Email

support@softrol.com

Hardware Repair

A Return Merchandise Authorization (RMA) is required to return a part for repair or credit. To request an RMA call 1-888-763-8765 (888-SOFTROL) ext. 122 or email rma@softrol.com.

Parts

For replacement parts contact Softrol's Parts Department between the hours of 8:30 a.m. and 5:30 PM EST at 1-888-763-8765 (888-SOFTROL) ext. 110 or email parts@softrol.com.

Site License

Site Licenses are available for all Softrol's automation and information networks. Please contact Softrol Support support@softrol.com or call 1-888-765-8765 (888-SOFTROL) ext.128

Index

Date	Revision No	Revision notes
9/24/14	1	Initial
9/27/15	2	Update to Web Reports
10/05/2015	3	Clarification for part/model designations

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