

---

# eMaint X3 System Overview

---

*This session provides a general overview of eMaint X3. It includes a review of the primary menu options and functions to assist new users in getting familiar with the system.*

## Table of Contents

About This Manual .....	4
Additional Resources .....	4
Accessing Your eMaint X3 Account .....	5
The eMaint X3 Version 10 Tab System.....	6
The Title Bar .....	6
The Home Tab.....	6
The Navigation Tab .....	7
My Account Setup Options.....	9
Changing Account Settings .....	9
User Administration .....	10
Contacts.....	12
The List View .....	12
Searching your Contacts .....	12
Detail View.....	13
Adding Contacts: .....	14
Editing Contacts: .....	15
Editing In Place .....	15
Deleting Contacts.....	16
Viewing Contact History .....	16
Parts File Information .....	17
List View .....	17
Searching your Parts.....	18
Detail View.....	18
Adding Parts.....	19
Editing Parts .....	19
Editing In Place .....	20
Deleting Parts.....	20
Adjustments.....	20
Viewing Part History .....	20
Key Change.....	21

---

Purchase .....	21
Recalculate.....	22
Asset File Information .....	23
List View .....	23
Searching your Assets.....	23
Detail View.....	24
Adding Assets .....	25
Editing Assets.....	25
Editing In Place .....	26
Deleting Assets .....	26
Charges.....	26
History .....	27
Key Change.....	27
Parts Charge .....	27
Labor Charge .....	28
Name Plate Lists .....	29
List View .....	29
Searching your Name Plates.....	30
Detail View.....	30
Adding Name Plates.....	31
Editing Name Plates.....	31
Editing In Place .....	31
Deleting Name Plates.....	31
Adding Name Plates to Assets .....	32
Importing Plate IDs.....	32
Adding Nameplates Directly .....	33
Preventive Maintenance.....	34
Establishing Preventive Maintenance (PM) Tasks.....	34
List View .....	34
Detail View .....	35
Establishing PM schedules on Assets .....	38
Adding PMs .....	39
Editing PMs .....	40
Editing In Place .....	40
Deleting PMs.....	40
Manual Generation.....	40
Copy PM Schedule.....	40
PM Parts.....	41

---

---

PM Procedures.....	41
PM Generation .....	43
Manual PM Generation .....	43
Manual Generation (On Demand).....	44
Automatic PM Generation.....	44
Using the Calendar .....	45
The Calendar List .....	45
Adding A Reminder.....	46
Work Order Center.....	47
The List View .....	47
Searching your Work Orders .....	47
Detail View.....	48
Adding Work Orders:.....	49
Editing Work Orders: .....	50
Editing In Place .....	51
Deleting Work Orders .....	51
Close Out .....	52
Print.....	53
Purchase .....	53
Work Order Charges .....	53
Work Procedures.....	54
Assignments.....	54
Printing Work Orders.....	56
Printing a single work order .....	56
Printing a Filtered Group of Work Orders .....	56
Work Order Requests .....	57
Request Manager .....	57
Searching your Work Order Requests.....	57
My Requests.....	58
Adding a New Work Request.....	58
Editing Requests:.....	59
Editing In Place.....	60
Deleting Requests .....	60
Approving and Denying Requests .....	60
Lookups for Problem Types, Work Order Types, and Departments.....	61

## About This Manual

Throughout this text you may see references to other manuals. This manual is provided in conjunction with the Overview training course and is intended as an overview for users to get familiar with the common features of the application.

Other training courses and the corresponding manuals that are provided with the trainings include:

- Work Order Management Level 1 – Provides a detailed explanation of Work Orders and Work Requests.
- Work Order Management Level 2 – A detailed look at the preventive maintenance process in eMaint.
- Planner/Timecard Module – This manual is offered in conjunction with Work Order Management Level 1 for those clients that wish to setup and utilize the Planner/Timecard module.
- Inventory Control – Process of tracking and managing your inventory, including parts file setup, supplier management, reordering stock parts, creating purchase orders (PO), tracking parts charges to assets, and producing inventory reports.
- Inventory Control for Multiple Locations – A slight modification to the standard inventory control manual, with a focus on the setup and management of multiple inventory stockroom locations, and a review of the requisitioning process that must be used for parts replenishment when using multiple storeroom locations.
- Requisitioning Method of Inventory Control – For those who use the Requisitioning module as part of the parts reorder process. Explains the process for requisition setup, creating and approving requisitions, and producing stock requisitions.
- System Administration – Provides a detailed overview of all the administrative functions in eMaint, including adding and defining users and user rights, various system setup options, and customizing forms.
- Data Dictionary Bible – A manual offered in conjunction with the System Administration training, it describes the fields found in the Data Dictionary. Made available to expert system users only.
- Query Builder – Overview of the basic concepts of report writing and using the Query Builder to create basic reports.
- Advanced Query Builder – This course discusses more advanced features in the Query Builder for producing complex reports.

### **Additional Resources**

#### **eMaint University**

Other training materials and resources designed to help you become proficient in all areas of the system are available through the **eMaint University** link on your eMaint X3 account. **eMaint University** is our e-learning portal, and is regularly updated with new content. For more information, please contact us at 856-810-2700 or [info@emaint.com](mailto:info@emaint.com).

#### **Customer Support**

We offer three ways to get the help you need:

Phone – 856-810-2700 extension 1


Email – [support@emaint.com](mailto:support@emaint.com)

Live chat – Go to <http://www.emaint.com> and click the **Live Chat** box

## Accessing Your eMaint X3 Account

When you have established an eMaint X3 account through the eMaint.com Web site, you can access it through any computer or device that has Internet access.

To access your account, visit the eMaint Web site at <http://www.emaint.com>. Click on the 'Login' link at the top of the page. At the 'Customer Login' page, enter your account name and password and then click the 'Login' button.

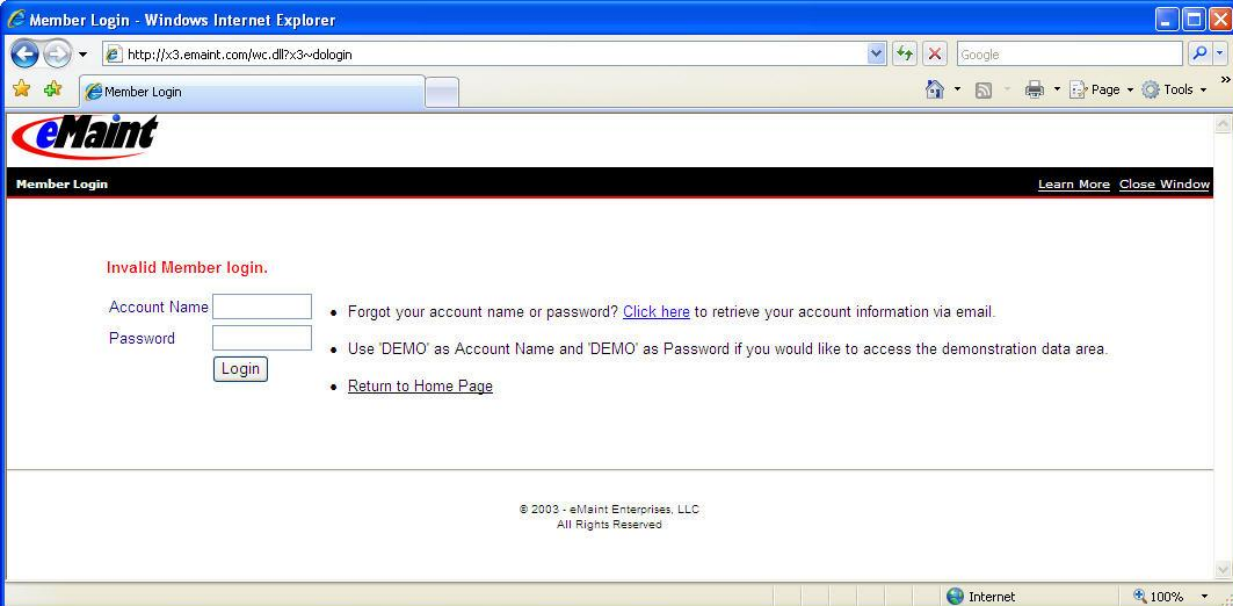
A secure session is also available to organizations that prefer it. Navigate to the login page as normal. Click the 'Secure Login Page' link located under the 'Login' button. The login page will reload with encryption enabled. Your browser will display a lock icon  to indicate a secure session is in place.

The SSL-encrypted session securely uploads and downloads information to keep your data secure while travelling across the internet. However, the encryption process requires a little more work from your computer and may affect performance.

If you entered your account name or password incorrectly, an Invalid Member Login screen appears (see below). You have the option to re-enter your Account Name and Password, request your login information via email, access the Demo account, or return to the eMaint.com home page.



The image shows a 'Customer Login' form with a red header. It contains two input fields: 'Account Name:' and 'Password:'. Below the password field is a blue 'Login' button. At the bottom of the form, there is a purple link that says 'Secure Login Page'.



The image shows a screenshot of a web browser displaying an 'Invalid Member login' error page. The page has a blue header with the eMaint logo and the text 'Member Login'. Below the header, there is a red error message: 'Invalid Member login.'. Underneath, there are two input fields for 'Account Name' and 'Password', and a 'Login' button. To the right of the input fields, there is a list of links: 'Forgot your account name or password? [Click here](#) to retrieve your account information via email.', 'Use 'DEMO' as Account Name and 'DEMO' as Password if you would like to access the demonstration data area.', and 'Return to Home Page'. At the bottom of the page, there is a copyright notice: '© 2003 - eMaint Enterprises, LLC. All Rights Reserved.' The browser window title is 'Member Login - Windows Internet Explorer' and the address bar shows 'http://x3.emaint.com/wc.dll?x3~dologin'.

If you logged in correctly, you will be at the main page of your account, which is known as the eMaint X3 Control Center.

## The eMaint X3 Version 10 Tab System

The new interface in version 10 uses tabs to navigate to the most common areas of your account. Click the desired tab to open the page.

Another new feature of version 10 is “persistent tabs”. An example of this is when you are looking at work order number 256 in the work order tab and need to see the details of a part before charging it to the work order. You click the parts tab to find the information you need. Then, when you go back to the work order tab to charge that part, work order number 256 will still be present on the screen.

Taking the persistent tabs one step further, the system will also remember the page you were on for every tab, even after you log out of the system and log in another time.

### The Title Bar

The version 10 header contains system links for your convenience. These links are:

- My Account – This is a quick link to the Account Settings page. This is the same as clicking the Navigation tab then the Change Your Settings link in the Administration section. See page 8 to learn how to use this page.
- eMaint University – This e-learning portal offers a broad range of free and subscription-based training videos, manuals and other content to help you get the most out of your system.
- Support – This link will open our website’s support page in a new window. This page contains various options for contacting the eMaint Support Department.
- Logout – A quick and convenient link to log out of your eMaint account.
- About – This link opens a page from our website that highlights the features of eMaint as a company and eMaint as your CMMS solution.

### The Home Tab

The Home Tab is the home page for eMaint. The administrator can customize this page by using the “Edit Content” link found on the Quick Bar.

## **The Navigation Tab**

The Navigation tab is the applications site map of version 10. Navigate to this page when you need to reference any section that does not have a tab.

The options available in the Navigation Tab are listed below, separated into their appropriate sections.

*NOTE: Whether a user sees any of the menu options explained below is dependent on the level of permissions granted to the user by the administrator.*

### **Main**

- Log Out – Log out of the eMaint X3 system.
- eMaint.com Home Page – Open the eMaint.com home page in a separate window.

### **Request Center**

- Request Manager – Provides access to the work order request listing and details.
- My Requests – Displays the user's requests in 3 groups: current open work orders, rejected requests in the last 30 days and a user-specified history of all requests.

### **Work Center**

- Work Order Center – Provides access to the work order listing and the detail of the work orders.
- Work Order Print Manager – Prints work orders by user-definable filters.
- Group Close Out – A tool that is used to select a group of open work orders (based on several filter options such as Route, Assignment, etc.) and quickly close them.
- Maintenance Calendar - Displays any task that is set up to show on calendar ("On Calendar" field = True on the PM schedule screen).
- Simple Work Order – Opens a simplified work order form for quick entry.
- Add New Work Order – A shortcut link to the work order form in add mode.

### **Purchasing Center**

- Create Purchase Order – Creates purchase orders for a particular supplier.
- Parts Reorder List – Displays list of stock parts that are due to be reordered based on reorder points. Reorders can then be processed from this screen.
- PO Receipts – Used to select a PO and receive individual items on the PO.
- Update Pending PO's – A processing screen used to update and process pending PO's.
- Purchase Order Center – Displays the purchase orders in the system. Options to filter based on Supplier and date range. Access PO's for editing and receiving.

### **PM Center (Preventative Maintenance Center)**

- Generate PM Work Orders – A tool that is used to manually generate multiple PM's into work orders.
- PM Tasks – Where PM tasks are defined and stored so that they can be associated to PM schedules.
- PM Manager – Used to manage the PM schedules in your system based on criteria you select.

### **Data Center**

- Asset File Information – Views the Asset List and Details. From Asset Detail, you can view the PM Schedules associated with the asset.
- Parts File Information – Views the inventory list and details in your system.
- PM Task Library – Provides a generic list of tasks to perform on common equipment. This section is meant for copying and pasting into PM Tasks.
- Maintenance Contacts – Contacts are tracked here. Anyone that is to be assigned to a task must have a record in Maintenance Contacts.
- Parts by Supplier – A list of all the part/ supplier relationships you have established in your inventory file.

- Name Plate Lists – A list of nameplate types that are built into eMaint. Users have the ability to define additional nameplate types. The nameplate attributes are then 'imported' directly onto an asset record.
- Problem Type Management – View and modify the problem types for your work orders.
- Department Management – View and modify the departments used on your work orders and your assets.
- Work Type Management – View and modify the work types used on your work orders.

#### Data Explorer

- Asset Explorer – Tool to view assets in a tree or hierarchical view and to choose the structure of that hierarchy.
- Parts Explorer – Tool to view inventory in a tree or hierarchical view and to choose the structure of that hierarchy.
- Contact Explorer – Tool to view contacts in a tree or hierarchical view and to choose the structure of that hierarchy.

#### Report Center

- Query Builder – Advanced reporting tool which allows you to create reports.
- Digital Dashboard – The digital dashboard contains predefined reports that display data from multiple tables and outputs the results to either graph or CSV format.
- Inventory Valuation Report – Report which provides the actual value of inventory based on the purchase price of each item.
- Percentage Complete – Tool used to view the percentages of closed versus open work orders.

#### Administration

- Change Your Settings – Used to change the user's information (name, password, company and contact information, email address, etc). It is also used to indicate how date information should display in the system when viewing date fields on a detail screen. Work Order and PM email options are also accessed and defined from this screen.
- User Administration – Administrator option used to change information and security rights for users on the account.
- Add New Users – Administrator option used to create additional users for the account.
- Log in as Another User – Takes you to a new log in page.
- Export Data – Tool that is used to export your data from selected tables in eMaint. Available tables to export are Work Orders, Assets, Parts, Contacts, and Charges. Output can be Excel (XLS), comma delimited (TXT), or database (DBF) format.
- Manage Data Dictionary – Provides access to the system's data dictionary.
- Remove Deleted Records – Used to view records that are marked for deletion and permanently remove them from the system.
- Customize my own page – Same as the Edit Content link on the Quick Bar of the Home tab but uses a different HTML editor. This section also provides some graphics management.
- Site Activity Report – Displays a list of users that were signed into the system in a user-specified date range.

#### Help

- Live Support – Allows you to connect to the eMaint Support Department Live Chat website.
- Help – Opens the eMaint Training webpage for information on the various training classes.



## My Account Setup Options

There are several options available under the Setup menu.



The Administration menu is covered in detail in the System Administration manual. The options that are reviewed in this overview are 'Change Your Settings' and 'User Administration.'

### Changing Account Settings

The Account Settings screen contains two sections. The top portion shows the information for the user and the bottom portion shows the areas of the system which the administrator can manage. When making changes in any section, be sure to save the settings before leaving that page.

The top portion of the screen contains the account and contact information for the current user. You can change your account password, set a password expiration interval (default is 0; password is valid indefinitely) or make other updates to your contact information.

Account Name and Password	
Name	ACME01
Password	<a href="#">Change Password</a>
Password duration (days)	0
Contact Information	
Full Name	Jeff Werth
Company	Acme Company
Address (1)	100 Main Street
Address (2)	
City	Washington
State	DC
Zip	12345
Country	USA
Phone #	555-555-1212
Fax #	
Email Address	vincent.cammarota@emaint.com
<b>Save Settings</b>	
Administrator System Settings	
<ul style="list-style-type: none"> <li>General System Settings</li> </ul>	

The bottom section provides links to manage the way work orders and PM's are managed in your system.

Administrator System Settings	
	General System Settings
	User Interface Settings
	General Work Order Settings
	Work Order Email Settings
	PM Settings
	Inventory Control Settings
	Purchasing and Requisitioning Settings

- General System Settings – Allows you to set system wide formatting such as the date format, the currency symbol, turning on and off old-style lookups, system-wide user password expiration and turning on Edit In Place.
- User Interface Settings – Allows you to add, remove and rearrange the tabs.
- General Work Order Settings – Allows you to choose if closed work orders can be edited, if closed work orders can be reopened by the administrator, which related tables will be included on the work order's HTML printout and what the next work order number will be.
- Work Order Email Settings – Allows you to choose which contacts – Administrator, Perform For, Assign To, Request Notification Group – will be notified when work orders are opened or closed in your system. In the case of Request Notification Group, you can also set the Take Ownership Link which allows the user to assign and close a work order to himself through the email. Lastly, you can also choose the subject line for those emails.
- PM Email Settings – Allows you to activate automatic generation and emailing of the PM schedules in your system.
- Inventory Control Settings – This module allows for multiple inventory locations to be used for purchasing in your system. You will be unable to modify this area unless you have the module installed. Inventory Control Settings also contains an option to charge parts directly to an asset instead of through the work order charge out process. When selected, this option will create a new link on the assets called 'Parts Charge.'
- Purchasing and Requisitioning – This module allows for control of the requisitioning process for those eMaint clients who use it. *These settings do not affect the purchasing process for clients who do not use requisitioning.*

### User Administration

If you plan to have more than one user on your account, you will need to add the new user to the account then set the user rights for that user.

As the System Administrator, step #1 is to 'Add New Users' to the account using this menu option from your Administration Menu.

Step #2 is to open 'User Administration' to define the security rights that the additional users will have.

Action	Account Name	Full Name	Administrator?	Work Requestor?
	ACME01	Jeff Werth	Yes	
	REQUES98	Ryan Kay		Yes
	ACME02	Cheryl Molotsky		
	ACME03	Brian Dunn		
	ACME04	Craig Evans		
	ACME05	Michelle Sye		
	ACME06	Alex Allen		
	ACME07	Vincent Cammarota		

© 2003 - eMaint Enterprises, LLC  
All Rights Reserved

Click the pencil icon for the user you want to define permissions. You will be presented with the eMaint User Rights screen. This page allows you to edit the account properties of your user and adjust the permissions he/she has in the system.

Menu Items	Check/Uncheck all	Additional Options	Check/Uncheck all	Tabs	Check/Uncheck all
<b>MAIN</b>		<b>Asset File</b>		<input checked="" type="checkbox"/> Condition Monitoring	
<input checked="" type="checkbox"/> Log Out		<input checked="" type="checkbox"/> Access File		<input checked="" type="checkbox"/> Home	
<input checked="" type="checkbox"/> eMaint.com Home Page		<input checked="" type="checkbox"/> Add Records		<input type="checkbox"/> Navigation	
<b>Request Center</b>		<input checked="" type="checkbox"/> Edit Records		<input checked="" type="checkbox"/> Dashboard	
<input checked="" type="checkbox"/> Request Manager		<input checked="" type="checkbox"/> Delete Records		<input checked="" type="checkbox"/> Work Orders	
<input checked="" type="checkbox"/> My Requests		<input checked="" type="checkbox"/> Issue Parts Charge		<input checked="" type="checkbox"/> Requests	
<b>Work Center</b>		<input checked="" type="checkbox"/> Issue Labor Charge		<input checked="" type="checkbox"/> Assets	
<input checked="" type="checkbox"/> Work Order Center		<input checked="" type="checkbox"/> Key Change		<input checked="" type="checkbox"/> Parts	
<input checked="" type="checkbox"/> Work Order Print Manager		<b>Contacts</b>		<input checked="" type="checkbox"/> Contacts	
<input checked="" type="checkbox"/> Group Close Out		<input checked="" type="checkbox"/> Access File		<input checked="" type="checkbox"/> Reports	
<input checked="" type="checkbox"/> Maintenance Calendar		<input checked="" type="checkbox"/> Add Records		<input checked="" type="checkbox"/> Calendar	
<input checked="" type="checkbox"/> Simple Work Order		<input checked="" type="checkbox"/> Edit Records			
<input checked="" type="checkbox"/> Time Card		<input checked="" type="checkbox"/> Delete Records			
<input checked="" type="checkbox"/> Planner		<b>Data Dictionary</b>			
<b>Purchasing Center</b>		<input checked="" type="checkbox"/> Access File			
<input checked="" type="checkbox"/> Create Purchase Order		<input checked="" type="checkbox"/> Add Records			
<input checked="" type="checkbox"/> Parts Re-Order List		<input checked="" type="checkbox"/> Edit Records			
<input checked="" type="checkbox"/> PO Receipts		<input checked="" type="checkbox"/> Delete Records			
<input checked="" type="checkbox"/> Update Pending POs		<b>Form Layout</b>			

The top portion allows you to change the user's name, account ID, password, password expiration time, and the user type (standard or requestor). You can also copy this user's permission set to another standard user.

The lower portion of the screen lists the permissions available for the user. Put checkmarks next to the menu options (left), security options (middle) and tab access (right) you want the user to access. Alternatively, you can click the "Check" or "Uncheck" links to select or unselect all options in that column. When finished, click the 'Save' button located on the top portion of the page. Now, if you log in with that user's name and password, you will only see the tabs and menu options that you assigned to that user.

See the System Administration manual for a detailed explanation of this screen.

## Contacts

There are several categories, or types, of contacts that are tracked in eMaint. The categories include Employee, Contractor, Supplier, Location, Customer, and Tenant. It is important to establish your list of contacts so you can assign employees or contractors to tasks and work orders or assign suppliers to parts. Click the Contacts tab to access your system's contacts.

### The List View

The List View contains user-selected fields from the contact detail screen that are most helpful in filtering and locating contacts in your system.

Contact ID	Full Name	Company	Category	Work Phone #
<a href="#">3001</a>	John Smith	McMaster Carr	Supplier	630-833-0300
<a href="#">3002</a>	Pete Wells	Grainger Industrial Supply	Supplier	218-624-4274
<a href="#">1001</a>	Bob Crawchuck	Acme Company	Employee	206-734-1522
<a href="#">1002</a>	Glenn Rossman	Acme Company	Employee	206-734-1522
<a href="#">1003</a>	William Reeder	Acme Company	Employee	206-734-1522
<a href="#">1004</a>	Rich Notella	Acme Company	Employee	206-734-1522
<a href="#">1005</a>	Ben Higgins	Acme Company	Employee	206-734-1522
<a href="#">2001</a>	Joe Button	Button Industrial Contracting	Contractor	206-412-5551
<a href="#">2002</a>	Robert Hickman	IME	Contractor	209-457-8961
<a href="#">1006</a>	Jeff Werth	Acme Company	Employee	206-734-1522
<a href="#">3003</a>	Don Williams	Central Isuzu Truck	Supplier	301.322.9000
<a href="#">3004</a>	Vincent Cammarota	eMaint Enterprises, LLC	Other	856-810-2700

Each contact displayed in the list has its Contact ID underlined. This means you can click the Contact ID to see the contact record in detail. To the left of each row are a magnifying glass icon and a pencil icon. You can click the magnifying glass icon to see the detail record of the contact. You can click the pencil icon to edit the contact record.

From this screen you can add a new contact record to the list by clicking 'Add New Record' in the upper right corner. If any changes were made to a contact while this window was open, click 'Refresh' to reload the page. The 'Learn More' link provides a brief description of the list view and how to navigate around it. To close the window and return to the main menu, click the 'Close Window' link in the upper right corner.

Click the 'Form Options' link at the bottom of the list to change the default settings of how this screen is displayed. This feature is described in more detail in the System Administration training manual.

### Searching your Contacts

You can expand your search further by applying sorts and/or filters.

#### Sorting the list

Click on one of the column headings and the list will sort in ascending order. Once sorted, a small arrow icon (pointing up) will appear to the right of the column name. This indicates that the list is sorted in ascending order. Click the arrow icon and the list will sort again, this time in descending order.

**Applying Filters to the List**

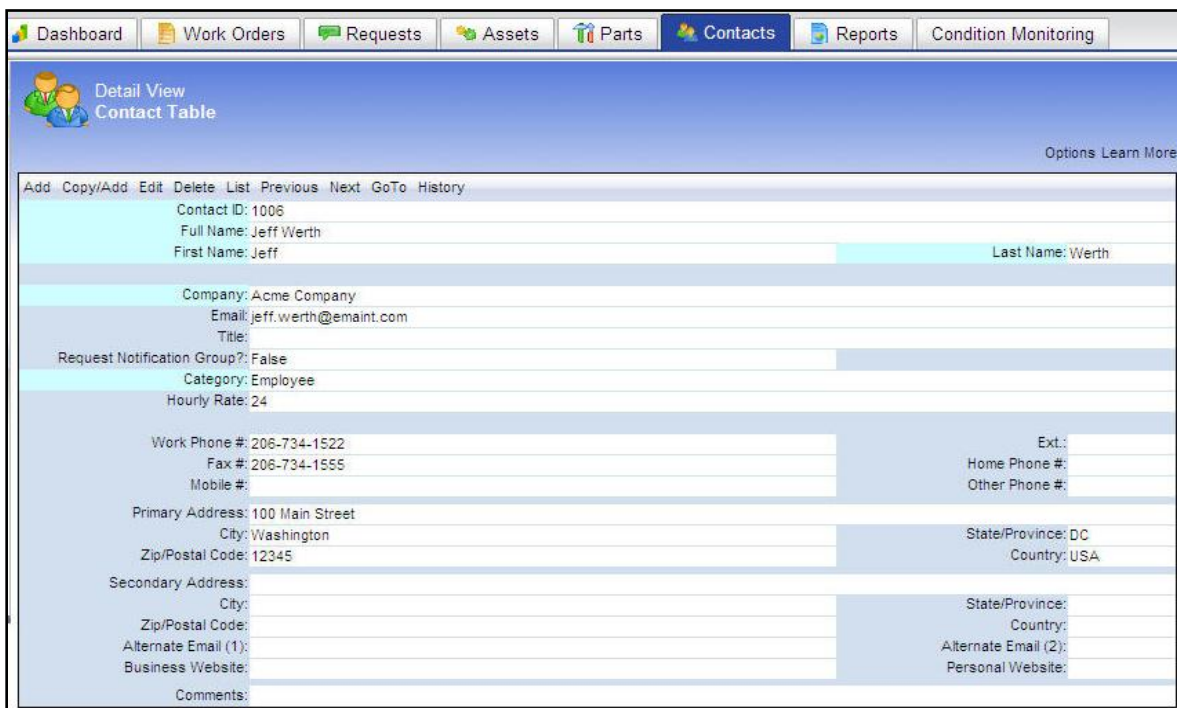
Filters are used to search the whole list and display the matching results. For example, if you wanted to see only those contacts whose category begins with the letter 'S', you would type the letter 'S' in the filter for the Category column and then click the red 'Set' link to the left of the filter row. Besides displaying the results, the number of records that matched the filter expression will display in the upper left of the screen. You can apply single or multiple filters at one time if needed.

To remove the filters, click the red "Clear" link. The full list will display.

**TIP:** The system remembers the filters and sorts that you apply and will display it the next time you navigate to that list.

**Detail View**

Clicking on the Contact ID or on the magnifying glass on the Contact list view will open the detail view of a contact.



*NOTE: With eMaint X3, you have the ability to add or remove fields to the screen as well as change field names and attributes, screen layout, colors, etc. Your screen may look slightly different than the example above. This functionality is explained in detail in the System Administration training manual.*

The detail view contains all of the information of a contact. From this screen, you have total control of your maintenance contacts.

Options at the top left corner of the screen include:

**Add** – Opens a blank record for entering a new contact.

**Copy/Add** – Opens a new record in Add mode and populates the form with the previous record's values.

**Edit** – Opens the record in Edit mode for changing the contact's information.

**Delete** – Marks the record for deletion and removes it from the list view.

**List** – Returns to the list view.

**Previous** – Displays the detail of the previous record (ordered by ID).

**Next** – Displays the detail of the next record (ordered by ID).

**GoTo** – Opens a window that allows you to navigate directly to a record by entering the Contact ID.

**History** – Displays a listing of the work order history performed for this contact on the bottom portion of the screen.

### Adding Contacts:

You can add new contacts from either the list or detail view. From the list view, the 'Add New Record' link is directly above the field headers and will open a new window in add mode. From the detail view, the 'Add' choice is the first in the main menu bar and will change the current window to add mode. The 'Copy/Add' option also changes the current window to add mode, except it will populate the form with the previous record's values for fast record entry.

Dashboard | Work Orders | Requests | Assets | Parts | **Contacts** | Reports | Calendar

Detail View  
Contact Table

Options Learn More

Save New Record

Contact ID:  key field

Full Name:

First Name:  Last Name:

Company:

Email:

Title:

Request Notification Group?:

Category:

Hourly Rate:

Work Phone #:  Ext.:

Fax #:  Home Phone #:

Mobile #:  Other Phone #:

Primary Address:  [HTML Editor]

City:  State/Province:

Zip/Postal Code:  Country:

Comments:  [HTML Editor]

The main fields to populate are the Contact ID, Full Name, First Name, Last Name, company information and category. If you will be sending work orders via email, enter the email address in the 'Email' field. If you'll be using the rate information when recording charges on a work order, enter the hourly rate in the field provided. If this contact should receive email notification when new work requests are entered, set "Request Notification Group" to "True."

### Editing Contacts:

The form for editing contact information can also be accessed from either the list or detail views. From the list, click the pencil icon. From the detail view, click the 'Edit' link in the menu bar. Both links will open the edit form in the existing window.

The 'Edit' form is similar to the 'Add' form, except that the key field cannot be edited. The key field is the unique identifier for the contact and cannot be changed.

Click 'Save Changes' to save the changes or 'Cancel Changes' to discard them. The form will return to the detail view of the contact.

The screenshot shows the 'Detail View Contact Table' form in the eMaint X3 system. The form is titled 'Detail View Contact Table' and includes a navigation bar with tabs for Dashboard, Work Orders, Requests, Assets, Parts, Contacts, Reports, and Calendar. The form contains the following fields and values:

- Contact ID: 00012 (key field)
- Full Name: Vincent Cammarota
- First Name: Vincent
- Last Name: Cammarota
- Company: eMaint Enterprises, LLC
- Email: vincent.cammarota@emaint.com
- Title: Technical Support Specialist
- Request Notification Group?: False
- Category: Contractor
- Hourly Rate: 0
- Work Phone #: 856-810-2700
- Ext.: 1
- Fax #:
- Home Phone #:
- Mobile #:
- Other Phone #:
- Primary Address: 438 N Elmwood Ave, Suite 201
- City: Marlton
- State/Province: NJ
- Zip/Postal Code: 08053
- Country: USA
- Comments:

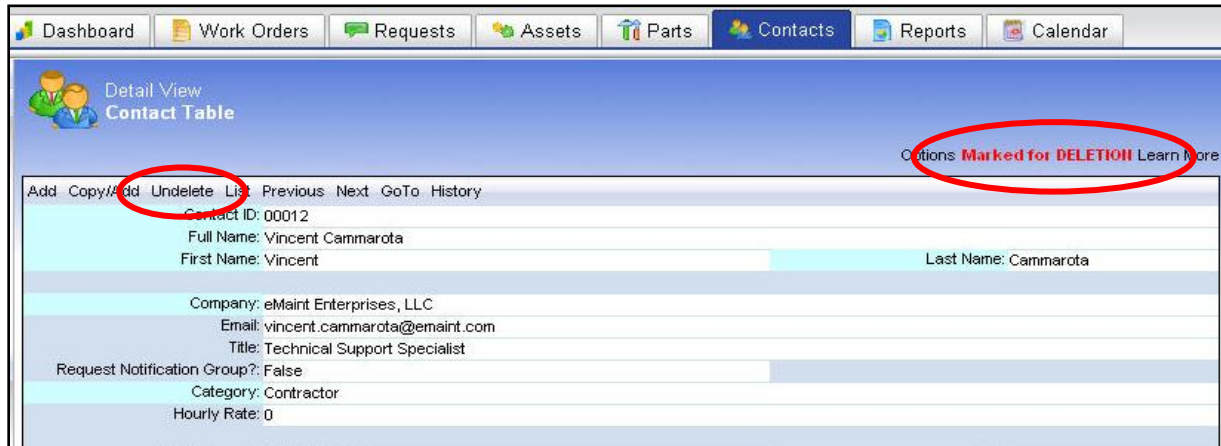
### Editing In Place

If "Edit In Place" is enabled, you can make changes to most fields without the need for entering edit mode. Enter the record's detail screen by clicking on the Magnifying Glass icon or the Contact ID link on the list view. Place your mouse cursor over the field you wish to edit. If the field is able to be edited, the cursor will change to a pencil icon. Double-click your left mouse button and the field will open in edit mode. Make your changes then click the save icon to save your changes or click the cancel icon to return without saving.

If a field cannot be edited with Edit In Place, the cursor will change to a “no” symbol . If editable, these fields require you to enter ‘Edit’ mode to make any adjustments.

### Deleting Contacts

Deleting records is a two step process. The first step is to mark the record for deletion by clicking the ‘Delete’ link. This removes the record from the list view but still allows you to locate it by using the ‘GoTo’ link (if you know the record ID) or using the ‘Next’ and ‘Previous’ links to page through the records. At this point, you can still un-delete the record by clicking the ‘Un-delete’ link.



The second step of the deletion process is to completely remove records from system. Go to the Remove Deleted Records link located in the Administration menu. This list displays the various tables that can hold records marked for deletion. Click the magnifying glass icon to preview items that will be deleted. Click the trash can icon to remove all the records for that section. For more information on deleting items, see the System Administration manual.

*NOTE: The Remove Deleted Items option permanently removes records. There is no way to bring them back. Use this feature at your own risk.*

### Viewing Contact History

Clicking the ‘History’ link will display the work order history in a list below the contact detail. For more information on an associated work order, the links provided will open the detail view of the work order.

Work Order History							<a href="#">Return to Standard View</a>		
WO No.	WO Date	WO Type	Status	Assign To	Perform For	Completed	Brief Description	Total \$	
<a href="#">28647</a>	06/07/2007	HELPDESK	H	Brian Samelson	eMaint Enterprises, LLC (Ryan Kay)	06/20/2007	My messed up aftersave...	\$ 0	
<a href="#">27769</a>	01/09/2007	HELPDESK	H	Sylvain Bujold	eMaint Enterprises, LLC (Ryan Kay)	01/11/2007	copy test account data	\$ 0.00	
<a href="#">26726</a>	06/15/2008	HELPDESK	O	Brian Samelson	eMaint Enterprises, LLC (Ryan Kay)	//	error in MUNICIPAL account	\$ 0	
<a href="#">26525</a>	05/19/2008	BUG	H	Sylvain Bujold	eMaint Enterprises, LLC (Ryan Kay)	06/07/2008	Demo Account	\$ 0.00	
<a href="#">26383</a>	04/14/2008	HELPDESK	H	Ryan Kay	TOMROG99	04/14/2008	Walk through	\$ 0.00	
<a href="#">26289</a>	04/04/2008	HELPDESK	H		eMaint Enterprises, LLC (Ryan Kay)	04/04/2008	test	\$ 0	
<a href="#">26288</a>	04/04/2008	HELPDESK	H		eMaint Enterprises, LLC (Ryan Kay)	04/04/2008		\$ 0	
<a href="#">26287</a>	04/04/2008	HELPDESK	H		eMaint Enterprises, LLC (Ryan Kay)	04/04/2008		\$ 0	
<a href="#">26284</a>	04/04/2008	HELPDESK	H	Donna Smith	eMaint Enterprises, LLC (Ryan Kay)	04/04/2008	test3	\$ 0	
<a href="#">26283</a>	04/04/2008	HELPDESK	H	Ryan Kay	eMaint Enterprises, LLC (Ryan Kay)	04/04/2008	test2	\$ 0	
<a href="#">26282</a>	04/04/2008	HELPDESK	H		eMaint Enterprises, LLC (Ryan Kay)	04/04/2008	test	\$ 0	
<a href="#">26679</a>	12/01/2008	BUG	O	Brian Samelson	eMaint Enterprises, LLC (Ryan Kay)	//	my test account	\$ 0	
<b>Grand Total for 12 WO's</b>								<b>\$ 0.00</b>	



## Parts File Information

The Parts File Information, accessed by clicking the Parts tab, contains your inventory information.

### List View

The List View contains the fields from the parts table that are most helpful in filtering and locating parts in your inventory.

Dashboard   Work Orders   Requests   Assets   <b>Parts</b>   Contacts   Reports   Calendar						
List View Parts File Listing						
Add New Record Refresh Learn More						
Item No	Description	Location	Unit Cost \$	On Hand	Stock Item	
<a href="#">Apply</a>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<a href="#">MIS1</a>	MISC. PARTS		0.00000	0.000	False	
<a href="#">2121</a>	Control, Ignition Module - Honeywell	I2B3	14.85000	20.000	True	
<a href="#">2122</a>	T & P Relief Valve	I2B4	23.24000	17.000	True	
<a href="#">2001</a>	Belt, Gates, Powergrip		100.64000	3.000	True	
<a href="#">2002</a>	Sprocket, 40BS25 1-1/2" Bore		16.99000	5.000	True	
<a href="#">2003</a>	Sprocket, Idler, 40NB19H, w/1" Needle Bearing		33.47000	2.000	True	
<a href="#">2004</a>	Sprocket, 50BTL28, 2012		29.47000	6.000	True	
<a href="#">2005</a>	Bearing, 6204-2RSJEM		6.39000	13.000	True	
<a href="#">2006</a>	Bearing, 6203, 2RSJEM		5.13000	12.000	True	
<a href="#">2007</a>	Bearing, 6206, 2RSJEM		15.21000	10.000	True	
<a href="#">2008</a>	Sprocket, 50BS28, 1-1/2" Bore		26.35000	5.000	True	
<a href="#">2009</a>	Chain, Roller, 40"		2.86000	27.000	True	
<a href="#">2010</a>	Belt, V, B-46		5.35000	33.000	True	
<a href="#">2011</a>	O-Ring		3.30000	38.000	True	
<a href="#">2012</a>	Motor, Baldor, M3611T		186.84000	1.000	True	
<a href="#">2013</a>	Recepticle, Duplex, White, 20 amp		2.68000	25.000	True	
<a href="#">2014</a>	Switch, Toggle, Single Pole		3.56000	33.000	True	
<a href="#">2015</a>	Recepticle, GFCI		16.64000	4.000	True	
<a href="#">2016</a>	Puller, Chain		17.30000	11.000	True	
<a href="#">2017</a>	Breaker, Circuit, GE, 40 amp, 480 V		11.52000	14.000	True	
<a href="#">2018</a>	Shield, Plasma Cutter		11.91000	31.000	True	
<a href="#">2019</a>	Hose, Air, Coiled 3/8" x 12"		19.99000	16.000	True	
<a href="#">2020</a>	Hose, Air, Coiled 1/4" x 12"		12.99000	19.000	True	
<a href="#">2045</a>	Light Bulb - 300W Halogen		18.45000	31.000	True	

The parts are displayed in rows with column headers at the top of each row. Note that each part displayed in the list has its 'Item No.' underlined. This means you can click the Item No. to see the part record in detail. To the left of each row are two icons. The magnifying glass icon will open the detail record of the part. The pencil icon will open the part record in edit mode.

From this screen you can add a new part record to the list by clicking 'Add New Record' in the upper right corner. If any changes were made to a part while this window was open, click 'Refresh' to reload the page. The 'Learn More' link provides a brief description of the list view and how to navigate around it. To close the window and return to the main menu, click the 'Close Window' link in the upper right corner.

Click the 'Form Options' link at the bottom of the list to change the default settings of how this screen is displayed. This feature is described in more detail in the System Administration training manual.

### Searching your Parts

You can expand you search further by applying sorts and/or filters.

#### Sorting the list

Click on one of the column headings and the list will sort in ascending order. Once sorted, a small arrow icon (pointing up) will appear to the right of the column name. This indicates that the list is sorted in ascending order. Click the arrow icon and the list will sort again, this time in descending order.

#### Applying Filters to the List

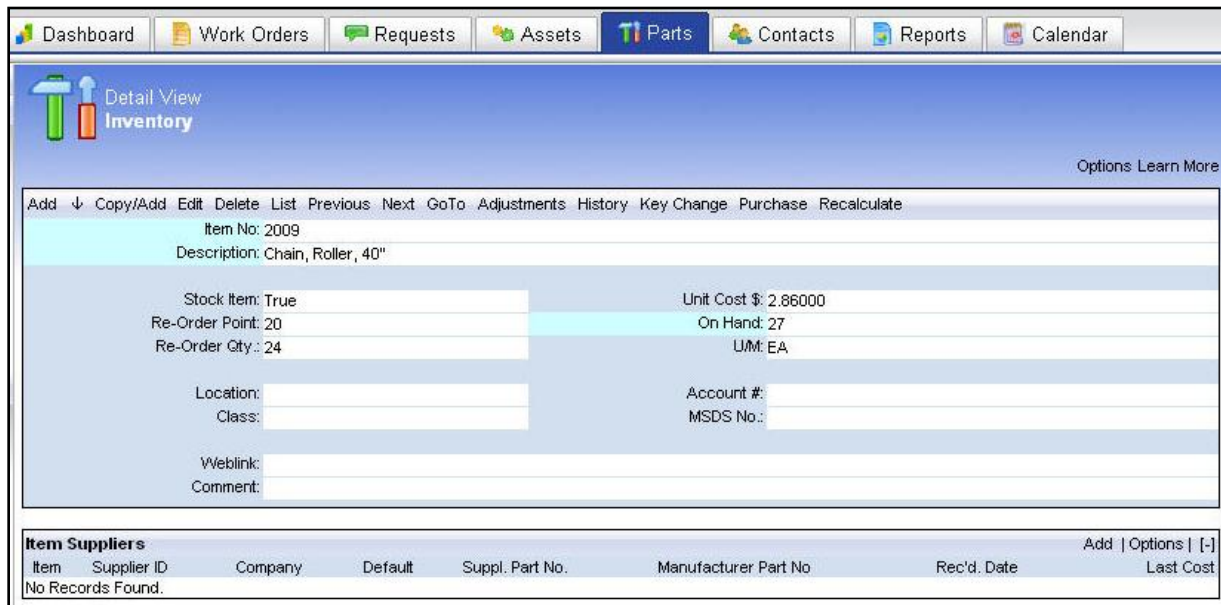
Filters are used to search the whole list and display the matching results. For example, if you wanted to see only the parts with a location that begins with the letter 'S', you would type the letter 'S' in the filter for the Location column and then click the red 'Set' link on to the left of the filter row. Besides displaying the results, the number of records that matched the filter expression will display in the upper left of the screen. You can apply single or multiple filters at one time if needed.

To remove the filters, click the red "Clear" link. The full list will display.

**TIP:** The system remembers the filters and sorts that you apply and will display it the next time you navigate to that list.

### Detail View

The detail view is accessible from the List view by clicking on the Item No. or clicking on the magnifying glass icon in the left column of the list.



The screenshot shows the 'Detail View Inventory' interface. At the top, there is a navigation bar with tabs for Dashboard, Work Orders, Requests, Assets, Parts, Contacts, Reports, and Calendar. Below the navigation bar, the page title is 'Detail View Inventory' with a magnifying glass icon and 'Options Learn More' link. The main content area displays the following information:

- Item No.: 2009
- Description: Chain, Roller, 40"
- Stock Item: True
- Unit Cost \$: 2.86000
- Re-Order Point: 20
- On Hand: 27
- Re-Order Qty.: 24
- U/M: EA
- Location: [Text Box]
- Account #: [Text Box]
- Class: [Text Box]
- MSDS No.: [Text Box]
- Weblink: [Text Box]
- Comment: [Text Box]

At the bottom of the screen, there is a table titled 'Item Suppliers' with the following columns: Item, Supplier ID, Company, Default, Suppl. Part No., Manufacturer Part No., Rec'd. Date, Add, Options, and Last Cost. The table currently shows 'No Records Found.'

The detail view contains all of the information of a part from the Parts table. From this screen, you have total control of your parts inventory.

*NOTE: With eMaint X3, you have the ability to add or remove fields to the screen as well as change field names and attributes, screen layout, colors, etc. Your screen may look slightly different than the example above. This functionality is explained in detail in the System Administration manual.*

Options at the top left corner of the screen include:

**Add** – Opens a blank record for entering a part.

**Copy/Add** – Opens a new record in Add mode and populates the form with the previous record's values.

**Edit** – Opens the record in Edit mode for changing the part's information.

**Delete** – Marks the record for deletion and removes it from the list view.

**List** – Returns to the list view.

**Previous** – Displays the detail of the previous record (ordered by ID).

**Next** – Displays the detail of the next record (ordered by ID).

**GoTo** – Opens a window that allows you to navigate directly to a record by entering the Item No.

**Adjustments** – Opens the form to change the existing on-hand quantity.

**History** – Displays the transaction history of the part directly below the display fields (see below).

**Key Change** – Allows you to change the key field of the part.

**Purchases** – Opens a new form to indicate purchases made from the suppliers.

**Recalculate** – Open the Recalculate window to fix any discrepancies caused by purchase order editing and voiding.

### Adding Parts

You can add new parts from either the list or detail view. From the list view, the 'Add New Record' link is directly above the field headers and will open a new window in add mode. From the detail view, the 'Add' choice is the first in the main menu bar and will change the current window to add mode. The 'Copy/Add' option also changes the current window to add mode, except it will populate the form with the previous record's values for fast record entry.

The key field for Inventory Parts is 'Item No.' and must be entered before 'Save New Record' is pressed. However, you should enter as much information as you can to help identify the part in a list. Click 'Save New Record' to save the new part. 'Cancel Changes' will completely discard the new part information.

### Editing Parts

The form for editing part information can also be accessed from either the list or detail views. From the list, click the pencil icon to edit the part information. From the detail view, click the 'Edit' link in the menu bar. Both links will open the edit form in the existing window.

The 'Edit' form is similar to the 'Add' form, except that the key field and On Hand values cannot be edited. The key field is the unique identifier for the part and can only be changed using the 'Key Change' option. To change the On Hand quantity, use the Adjustments menu option.

Click 'Save Changes' to save the changes or 'Cancel Changes' to discard them. The form will return to the detail view of the part.

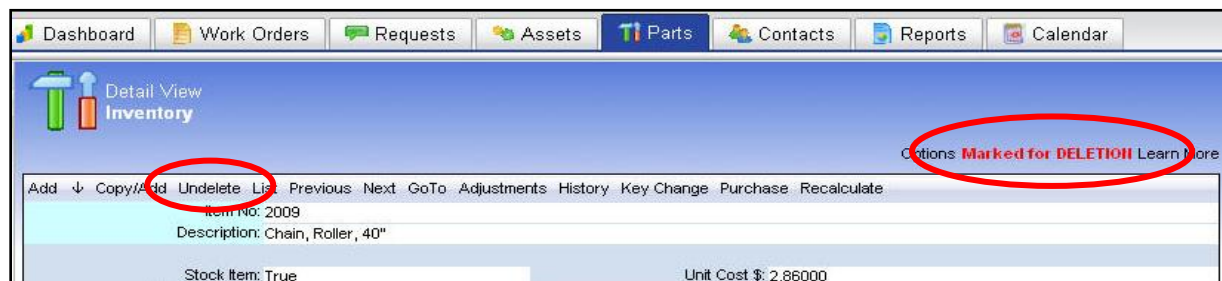
### Editing In Place

If "Edit In Place" is enabled, you can make changes to most fields without the need for entering edit mode. Enter the record's detail screen by clicking on the Magnifying Glass icon or the Item No. link on the list view. Place your mouse cursor over the field you wish to edit. If the field is able to be edited, the cursor will change to a pencil . Double-click your left mouse button and the field will open in edit mode. Make your changes then click the save icon to save your changes or click the cancel icon to return without saving.

If a field cannot be edited with Edit In Place, the cursor will change to a "no" symbol . If editable, these fields require you to enter 'Edit' mode to make any adjustments.

### Deleting Parts

Deleting records is a two step process. The first step is to mark the record for deletion by clicking the 'Delete' link. This removes the record from the list view but still allows you to locate it by using the 'GoTo' link (if you know the record ID) or using the 'Next' and 'Previous' links to page through the records. At this point, you can still un-delete the record by clicking the 'Un-delete' link.



The second step of the deletion process is to completely remove the records from system. Go to the Remove Deleted Records link located in the Administration menu. This list displays the various tables that can hold records marked for deletion. Click the magnifying glass icon to preview items that will be deleted. Click the trash can icon to remove all the records for that section. For more information on deleting items, see the System Administration manual.

*NOTE: The Remove Deleted Items option permanently removes records. There is no way to bring them back. Use this feature at your own risk.*

### Adjustments

To provide an accurate history of your inventory, the system does not allow direct editing of the 'On-Hand' field. Instead, the 'Adjustments' link is used to track inventory changes. This process is covered in detail in the Inventory Control manual.

### Viewing Part History

On the part detail screen, click the 'History' link to access the history of transactions for the part. This will display in the bottom portion of the screen.

12 Month Part History ( Inv. Method = )								<a href="#">Return to Standard View</a>
Tran. Type	WO No. / Type	Asset ID	WO Date	Qty Ordered	Cost	Supplier ID	PO No.	Packing Slip
<b>Inventory location MAIN</b>								
ISSUE	51235	RTK2500	08/07/2007	1.00	\$ 2.77			
RECEIPT	n/a	n/a	06/07/2007	1.00	\$ 2.77	100869	00080	
RECEIPT	n/a	n/a	06/07/2007	1.00	\$ 2.87	100869	00080	TEST PACKING SLIP 060707
PURCHASE	n/a	n/a	06/07/2007	2.00	\$ 2.77	100869	00080	
PURCHASE	_1X40NQ67T	n/a	10/13/2006	4.00	\$ 2.00	101195	00052	

Click the magnifying glass to open the history in a separate window. This screen allows you to apply filters to specify both a time period and transaction type.

Range of Transaction Dates: Aug 16 2006 thru Aug 16 2007

Transaction Types: ALL

Item location: All

[Filter](#)

---

**RTK-123-456**  
VALVE BOSCH

Part History ( Inv. Method = ) [Return to Standard View](#)

Tran. Type	WO No. / Type	Asset ID	WO Date	Qty Ordered	Cost	Supplier ID	PO No.	Packing Slip
<b>Inventory location MAIN</b>								
ISSUE	51235	RTK2500	08/07/2007	1.00	\$ 2.77			
RECEIPT	n/a	n/a	06/07/2007	1.00	\$ 2.77	100869	00080	
RECEIPT	n/a	n/a	06/07/2007	1.00	\$ 2.87	100869	00080	TEST PACKING SLIP 060707
PURCHASE	n/a	n/a	06/07/2007	2.00	\$ 2.77	100869	00080	
PURCHASE	_1X40NQ67T	n/a	10/13/2006	4.00	\$ 2.00	101195	00052	

The links in these views navigate to other areas of the system that have affected this part. For example, clicking the 'PO No.' link will take you to the purchase order this item appeared on. Other areas include work orders and assets.

Click 'Return to Standard View' on the right side of the history to go back to the original detail view for the part.

### Key Change

Because key fields are not able to be changed in edit mode, the 'Key Change' link has been provided to safely change the key field without corrupting the record.

Clicking 'Key Change' will open the key change form. Enter the new number in the field provided and click 'Process'. This will display a summary of adjustments made to the table and verify the change is complete.

Click the 'Go Back without making changes' to return to the part without changing the key field.

Old Item No = **RTK-123-456**

New Item No =

[Process](#)

[Go Back without making changes.](#)

### Purchase

The 'Purchase' link is one of three ways to order a part. Clicking the link displays the Re-Order form in a new screen.

[Return to item detail](#)

**X3<sup>10</sup>**

Re-order list - 10/23/07

Qty Ordered	PO No.	Required Date	Item	Description	Qty Ordered/Location	Sequence
24	<input type="text"/>	10/30/2007	2009	Chain, Roller, 40"	EA	
Link:						
<a href="#">Process</a>	Supplier ID	Supp.Desc/Item No	Last Order	Cost	On Hand	On Order
	<input type="text"/>	<input type="text"/>	//	2.86	27	0
						Re-Order Point
						20

Purchasing is beyond the scope of this manual. See the Inventory Control manual for an in-depth discussion on this and other methods of purchasing.

### Recalculate

The 'Recalculate' is used to fix any discrepancies with the 'On Order' field on the Parts detail and the actual on order amount. This option is covered in detail in the Inventory Control manual.

## Asset File Information

The Asset File Information menu option will take you to the asset records or the equipment that you want to track in the system. Each asset record displays the meter readings associated with the asset, preventive maintenance schedules you have assigned to the equipment, the work order history associated with the equipment, the labor and parts charges that have been identified for the work orders associated with the equipment, and the Nameplate information you have entered for the equipment.

### List View

Click the Asset tab to display the Asset File Listing.

Asset ID	Asset Description	Manufacturer	Model No.
<a href="#">1029</a>	Baler	American	TP-24K
<a href="#">1038</a>	Baler (Scrap Trimmers)	American	
<a href="#">1026</a>	Band Saw	Rockwell	
<a href="#">2010</a>	Battery Bank	ALCAD	
<a href="#">2011</a>	Battery Charger	ALCAD	
<a href="#">BOX_01</a>	Box Lifter	Demag	K-39
<a href="#">1024</a>	Bridgeport Milling Machine	Bridgeport	
<a href="#">2000</a>	Cedar Lake Substation		
<a href="#">2001</a>	Circuit Switcher	S & C	
<a href="#">1019</a>	Compressor - Air	Gardner Denver	BESGB-2817RPM
<a href="#">1003</a>	Compressor, Air	Ingersoll Rand	C950
<a href="#">1034</a>	Copar Unit	Copar	
<a href="#">1031</a>	Core Machine	GTW	

The assets are displayed in rows with column headers at the top of each row. Note that each asset displayed in the list has its 'Asset ID' underlined. This means you can click the Asset ID to see the asset record in detail. To the left of each row are two icons. The magnifying glass icon will open the detail record of the asset. The pencil icon will open the asset record in edit mode.

From this screen you can add a new asset record to the list by clicking 'Add New Record' in the upper right corner. If any changes were made to an asset while this window was open, click 'Refresh' to reload the page. The 'Learn More' link provides a brief description of the list view and how to navigate around it. To close the window and return to the main menu, click the 'Close Window' link in the upper right corner.

Click the 'Form Options' link at the bottom of the list to change the default settings of how this screen is displayed. This feature is described in more detail in the System Administration training manual.

### Searching your Assets

You can expand your search further by applying sorts and/or filters.

#### Sorting the list

Click on one of the column headings and the list will sort in ascending order. Once sorted, a small arrow icon (pointing up) will appear to the right of the column name. This indicates that the list is sorted in ascending order. Click the arrow icon and the list will sort again, this time in descending order.

### Applying Filters to the List

Filters are used to search the whole list and display the matching results. For example, if you wanted to see only the assets with a department that begins with the letter 'S', you would type the letter 'S' in the filter for the Department column and then click the red 'Set' link to the left of the filter row. Besides displaying the results, the number of records that matched the filter expression will display in the upper left of the screen. You can apply single or multiple filters at one time if needed.

To remove the filters, click the red "Clear" link. The full list will display.

**TIP:** The system remembers the filters and sorts that you apply and will display it the next time you navigate to that list.

### Detail View

To view the detail record of a particular asset, either click on the underlined Asset ID in the list or on the magnifying glass icon to the left of the asset on the list. The detail record of that asset will display on screen (example below).

**Meter Readings**

Tran. ID.	Meter Type	Date Taken	Taken By	Meter Reading
No Records Found.				

**PM Schedule**

Produce Calendar Every?	Calendar Based Freq.	Calendar Freq Type	Next PM Date	Last PM Work Order Date	Last PM Work Order No.	Meter Type	Occurs Desc.	Produce PM Every	Last Meter Reading Entry	Last Meter Reading Date	Est. Hours
Go To	90.00	Days	Static	01/01/2008	10/03/2007	134	N/A	0	0		2.00
Sub											
Total											

**Related Parts**

Item	Descrip	Qty	U/M
Go To	2006	Bearing, 6203, 2RSJEM	1.00
Go To	2010	Belt, V, B-46	1.00
Sub			
Total			

The detailed information about the asset is shown in the top portion of the screen. These are the basic fields that are used to describe an asset.

*NOTE: With eMaint X3, you have the ability to add additional fields to the detail screen (or remove them), change field names and attributes, change the screen layout, change colors, etc. This functionality is explained in detail in the System Administration manual.*



The additional sections of the asset detail screen are Meter Readings (entering meters), PM Schedules (establishing PM Schedules discussed on page 33), Related Parts (associating parts with the asset), and Nameplate Information (discussed on page 28).

The additional options available for the asset detail include:

**Add** – Opens a blank record for entering a new asset.

**Copy/Add** – Opens a new record in Add mode and populates the form with the previous record's values.

**Edit** – Opens the record in Edit mode for changing the asset's information.

**Delete** – Marks the record for deletion and removes it from the list view.

**List** – Returns to the list view.

**Previous** – Displays the detail of the previous record (ordered by ID).

**Next** – Displays the detail of the next record (ordered by ID).

**GoTo** – Opens a window that allows you to navigate directly to a record by entering the Contact ID.

**Charges** – Displays all the charges made against the asset in a window directly below the detail view.

**History** – Displays work order history of the asset directly below the detail view.

**Key Change** – Allows you to change the key field of the part.

**Parts Charge** – Allows you charge parts against the asset without an existing work order.

**Labor Charge** – Allows you to charge labor against the labor without an existing work order.

### Adding Assets

You can add new assets from either the list or detail view. From the list view, the 'Add New Record' link is directly above the field headers and will open a new window in add mode. From the detail view, the 'Add' choice is the first in the main menu bar and will change the current window to add mode. The 'Copy/Add' option also changes the current window to add mode, except it will populate the form with the previous record's values for fast record entry.

The key field for assets is 'Asset ID' and must be entered before 'Save New Record' is pressed. However, you should enter as much information as you can to differentiate the asset from others. Click 'Save New Record' to save the new asset. 'Cancel Changes' will discard the new asset information.

### Editing Assets

The form for editing asset information can also be accessed from either the list or detail views. From the list, click the pencil icon. From the detail view, click the 'Edit' link in the menu bar. Both links will open the edit form in the existing window.

The 'Edit' form is similar to the 'Add' form, except that the key field cannot be edited. The key field is the unique identifier for the part and can only be changed using the 'Key Change' option.

Click 'Save Changes' to save the changes or 'Cancel Changes' to discard them. The form will return to the detail view of the asset.

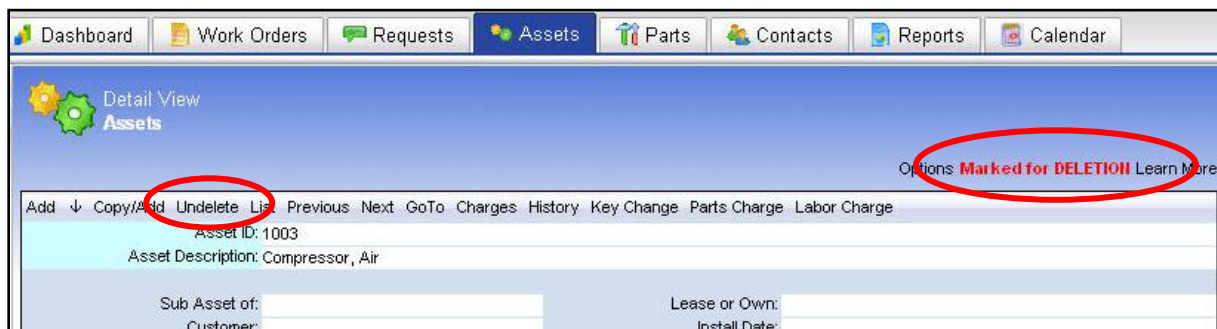
### Editing In Place

If “Edit In Place” is enabled, you can make changes to most fields without the need for entering edit mode. Enter the record’s detail screen by clicking on the Magnifying Glass icon or the Asset ID link on the list view. Place your mouse cursor over the field you wish to edit. If the field is able to be edited, the cursor will change to a pencil . Double-click your left mouse button and the field will open in edit mode. Make your changes then click the save icon to save your changes or click the cancel icon to return without saving.

If a field cannot be edited with Edit In Place, the cursor will change to a “no” symbol . If editable, these fields require you to enter ‘Edit’ mode to make any adjustments.

### Deleting Assets

Deleting records is a two step process. The first step is to mark the record for deletion by clicking the ‘Delete’ link. This removes the record from the list view but still allows you to locate it by using the ‘GoTo’ link (if you know the record’s ID) or using the ‘Next’ and ‘Previous’ links to page through the records. At this point, you can still un-delete the record by clicking the ‘Un-delete’ link.



The second step of the deletion process is to completely remove the records from system. Go to the Remove Deleted Records link located in the Administration menu. This list displays the various tables that can hold records marked for deletion. Click the magnifying glass icon to preview items that will be deleted. Click the trash can icon to remove all the records for that section. For more information on deleting items, see the System Administration manual.

*NOTE: The Remove Deleted Items option permanently removes records. There is no way to bring them back. Use this feature at your own risk.*

### Charges

Clicking this option will display the charges (labor, parts, misc., etc.) made to work orders that are associated with this asset. A date filter is provided to view a specific period of time.

Asset Charges							Return to Standard View	
Date Filter :		Feb 16 2007		thru Aug 15 2007		Filter (blank for all)		
WO No.	WO Date	Contactid	Description	Category	Qty	Unitcost	Extcost	
127	08/14/2007	IT1	Vincent Cammarota	Employee	1.00	\$ 0.00	\$ 0.00	
128	08/14/2007	IT1	Vincent Cammarota	Employee	1.00	\$ 0.00	\$ 0.00	
130	08/14/2007	IT1	Vincent Cammarota	Employee	1.00	\$ 0.00	\$ 0.00	
111	07/16/2007	IT1	Vincent Cammarota	Employee	1.00	\$ 20.00	\$ 20.00	
105	06/18/2007	IT1	Vincent Cammarota	Employee	0.50	\$ 20.00	\$ 10.00	
106	06/18/2007	IT1	Vincent Cammarota	Employee	0.10	\$ 20.00	\$ 2.00	
Sub-Total for Employee					4.60		\$ 32.00	
113	07/17/2007	WINXPHOME	Windows XP Home Edition	Parts	1.00	\$ 90.00	\$ 90.00	
Sub-Total for Parts					1.00		\$ 90.00	
112	07/12/2007	FAN4	MISC CHARGES	Purchase	1.00	\$ 3.99	\$ 3.99	
Sub-Total for Purchase					1.00		\$ 3.99	
Charges Grand Total							\$ 125.99	

**TIP:** Notice that the work order numbers are underlined on the display for both the History and Charges. This means you can click on the number and that work order record will display in a new window to view it in more detail.

### History

Clicking this option will display a listing of the work order history for the asset in the bottom portion of the screen. A date filter is provided to view a specific period of time.

Work Order History								Return to Standard View
Date Filter: Feb 16 2005 thru Aug 15 2007 Filter (blank for all)								
WO #	Date	Type	Status	Assign To	Perform For	Closed On	Brief Desc	Total £
<u>13432</u>	01/31/2007	REQUEST	H	(HL Fineman)		01/31/2007		£ 0
<u>13418</u>	02/01/2006	PM	O	Lawrence King	Jerry Astalos	//	1500AL Standun WIM-5.xls	£ 0
<u>13416</u>	01/07/2006	PM	O	Lawrence King	Jerry Astalos	//	1400SA Minster Press-5.xls	£ 0
<u>13408</u>	04/12/2005	PM	O	eMaint Enterprises LLC (Donna Smith)		//	Test with Picture Attachments	£ 0
<u>13407</u>	05/03/2005	PM	O	eMaint (Tom Flemer)		//	Central Control Panel, HVAC	£ 0
<u>13406</u>	05/22/2005	PM	O	Lawrence King	Jerry Astalos	//	1400M Minster Press-5.xls	£ 0
<u>13278</u>	02/01/2006	PM	O	Lawrence King	Jerry Astalos	//	1500Q Standun WIM-5.xls	£ 0
<u>13277</u>	02/01/2006	PM	O	Lawrence King	Jerry Astalos	//	1500M Standun WIM-5.xls	£ 0
<u>13276</u>	02/01/2006	PM	O	Lawrence King	Jerry Astalos	//	1500A Standun WIM-5.xls	£ 0
<u>13275</u>	02/01/2006	PM	O	Lawrence King	Jerry Astalos	//	1500TP Tool Pack Align.xls	£ 0
<u>13089</u>	08/01/2005	PM	O	Lawrence King	Jerry Astalos	//	1500AL Standun WIM-5.xls	£ 0

### Key Change

Since key fields are not able to be changed in edit mode, the 'Key Change' link has been provided to safely change the key field without corrupting the record.

Clicking 'Key Change' will open the key change form. Enter the new number in the field provided and click 'Process'. This will display a summary of adjustments made to the table and verify the change is complete.

Click the 'Go Back without making changes' to return to the part without changing the key field.

Old Asset ID = **TESTBOX**

New Asset ID =

[Cancel](#)

### Parts Charge

In the Inventory Control Settings section of 'Change Your Settings', there is an option to "Allow direct part charges to asset" which will allow you to create charges on an asset without going through the normal charge process on the work order. (See page 53 for more on the charge procedure.) When this option is set to yes, you will have an additional function available on the Asset detail screen called 'Parts Charge'. When you click this link, a part charge screen will show as below.

Enter the information in the text boxes provided. Fields without text boxes are

**Charge parts on asset ID 1003 Compressor, Air**

Transaction Date: Oct 23 2007

Qty:

Location: MAIN

Item No:

Description:

Location:

Acct. No:

On Hand:

Item Cost:

Extended Cost:

Asset Part List  Update Asset related parts list

[Reset Form](#)

populated automatically from other fields. For example, entering the 'Qty' (quantity) and 'Item Cost' fields will calculate the value for 'Extended Cost'.

If the part being charged isn't on the Related Parts table, click the 'Update Asset related parts list' checkbox on the 'Asset Part List' field to add this part to the list upon saving the form.

After you enter the information for the charge, click 'Validate Entries' to have the system verify the part exists in inventory and the values entered here are correct. Any success or error messages will appear at the top of the form. Click 'Save Entries' to save the form and return to the Asset detail screen.

The system will then create a blanket work order for the asset with a status of 'K' that contains 'Parts Charge Work Order' in the Brief Description field to separate it from regular work orders. If a blanket work order exists from a previous transaction, the charge will be added to the existing work order by adding a line in the 'Charges' table.

*NOTE: Only use this option if you have no intention of tracking your maintenance work on your assets but do wish to track parts costs for an asset. Charging out parts to a work order performed on an asset is the best way of tracking parts because of the complete information it provides about the type of work, length of work, and other key tracking items involved in the creation of work orders.*

## Labor Charge

In the General System Settings section of 'Change Your Settings', there is an option to "Allow Direct Labor Charges to Assets" which will allow you to create labor charges on an asset without going through the normal charge process on the work order. (See page 53 for more on the charge procedure.) When this option is set to yes, you will have an additional function available on the Asset detail screen called 'Labor Charge'. When you click this link, a labor charge screen will show as below.

Enter the information in the text boxes provided. Click 'Save and return' to save the form and return to the Asset detail screen. Click 'Save and Continue' to save the form and continue to add more labor charges to this asset.

The screenshot shows a web form titled "Charge Labor on asset ID 1003" with the sub-header "Compressor, Air". The form contains the following fields and controls:

- Category: Contractor (dropdown)
- Full Name: Select from list below (dropdown with search icon)
- Trandate: Oct 23 2007 (calendar icon)
- Start time: (text input with calendar icon)
- Stop time: (text input with calendar icon)
- Qty: 1 (text input)
- Hourly Rate (\$)/ Unitcost: 23.24 (text input)
- Sub-Category: (text input)
- Acct\_no: (text input)
- Comment: (text area)
- Buttons: "Save and Return" and "Save and Continue"
- Reset Form: (link)

The system will create a blanket work order for the asset with a status of 'K'. If a blanket work order exists from a previous transaction, the charge will be added to the existing work order by adding a line in the 'Charges' table.

## Name Plate Lists

Name plate information allows you to add specific equipment information to individual assets without adding the additional fields to the detail screen for every asset. This is an optional function that helps provide more information on your assets.

A name plate field consists of two identifiers:

**PlateID** – The type of equipment. Example: AVC\_UNIT, COMPRESSOR, BOILER.

**Description** – The particular item of information (also referred to as the name plate attributes). Example: Lifting Capacity, Generator, Voltage.

Each Plate ID will have multiple descriptions depending on the amount of information which must be gathered for that type of equipment.

### List View

In the Name Plate List you can add new plate IDs for your equipment and as many types of descriptive fields as you wish.

	Cuid	Descrip	Plateid
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<a href="#">1BG0TCOAY</a>	Type	AVC_UNIT
	<a href="#">1BG0TCOAZ</a>	Serves	AVC_UNIT
	<a href="#">1BG0TCOB0</a>	Manufacturer	AVC_UNIT
	<a href="#">1BG0TCOB1</a>	Local Representative	AVC_UNIT
	<a href="#">1BG0TCOB2</a>	Model Number	AVC_UNIT
	<a href="#">1BG0TCOB3</a>	Serial Number	AVC_UNIT
	<a href="#">1BG0TCOB4</a>	Belt(s) Size	AVC_UNIT
	<a href="#">1BG0TCOB5</a>	Filter(s) Size	AVC_UNIT
	<a href="#">1BG0TCOB6</a>	Fan:	AVC_UNIT
	<a href="#">1BG0TCOB7</a>	Capacity (CFM)	AVC_UNIT
	<a href="#">1BG0TCOB8</a>	Ext St Pr (In H2O)	AVC_UNIT
	<a href="#">1BG0TCOB9</a>	Number Of Fans	AVC_UNIT
	<a href="#">1BG0TCOBA</a>	HP	AVC_UNIT
	<a href="#">1BG0TCOBB</a>	RPM	AVC_UNIT
	<a href="#">1BG0TCOBC</a>	Amps	AVC_UNIT
	<a href="#">1BG0TCOBD</a>	Volts	AVC_UNIT

The name plates are displayed in rows with column headers at the top of each row. Note that each name plate displayed in the list has its 'CUID' underlined. This means you can click the CUID to see the name plate record in detail. To the left of each row are two icons. The magnifying glass icon will open the detail record of the name plate. The pencil icon will open the name plate record in edit mode.

From this screen you can add a new name plate record to the list by clicking 'Add New Record' in the upper right corner. If any changes were made to a name plate while this window was open, click 'Refresh' to reload the page. The 'Learn More' link provides a brief description of the list view and how to navigate around it. To close the window and return to the main menu, click the 'Close Window' link in the upper right corner.

Click the 'Form Options' link at the bottom of the list to change the default settings of how this screen is displayed. This feature is described in more detail in the System Administration training manual.

### Searching your Name Plates

You can expand you search further by applying sorts and/or filters.

#### Sorting the list

Click on one of the column headings and the list will sort in ascending order. Once sorted, a small arrow icon (pointing up) will appear to the right of the column name. This indicates that the list is sorted in ascending order. Click the arrow icon and the list will sort again, this time in descending order.

#### Applying Filters to the List

Filters are used to search the whole list and display the matching results. For example, if you wanted to see only name plates with a plate id that begins with the letter 'S', you would type the letter 'S' in the filter for the Plateid column and then click the red 'Set' link to the left of the filter row. Besides displaying the results, the number of records that matched the filter expression will display in the upper left of the screen. You can apply single or multiple filters at one time if needed.

To remove the filters, click the red "Clear" link. The full list will display.

**TIP:** The system remembers the filters and sorts that you apply and will display it the next time you navigate to that list.

You may add a new name plate value type directly from this list by clicking 'Add New Record.'

- Enter the Plate ID. The ID should not exceed 10 characters nor have spaces.
- Enter the description of the type of information.
- All name plate fields entered here will be available to load from the name plate section of the asset.

### Detail View

Details of a name plate are:

**CUID** – This is the unique key field for the name plate.

**Plateid** – Equipment name

of the asset. Examples include: A/C Unit, Vehicle and Transformr. The plateid is limited to ten characters.

**Descrip** – Description of the value being entered when applying to an asset. See below.

The additional options available for the name plate detail include:

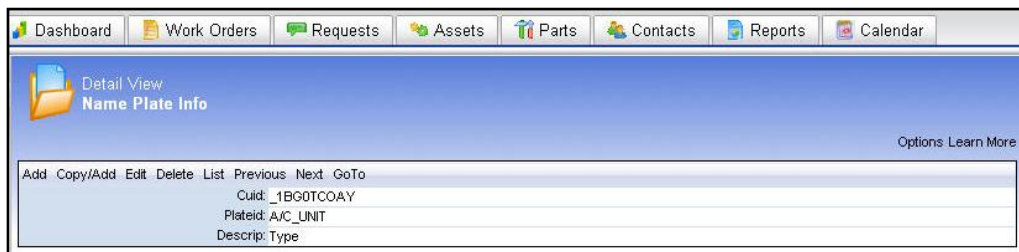
**Add** – Opens a blank record for entering a new name plate.

**Copy/Add** – Opens a new record in Add mode and populates the form with the previous record's values.

**Edit** – Opens the record in Edit mode for changing a name plate's information.

**Delete** – Marks the record for deletion and removes it from list view.

**List** – Returns to the list view.



**Previous** – Displays the detail of the previous record (ordered by ID).

**Next** – Displays the detail of the next record (ordered by ID).

**GoTo** – Opens a window that allows you to navigate directly to a record by entering the Contact ID.

### Adding Name Plates

You can add new name plates from either the list or detail view. From the list view, the 'Add New Record' link is directly above the field headers and will open a new window in add mode. From the detail view, the 'Add' choice is the first in the main menu bar and will change the current window to add mode. The 'Copy/Add' option also changes the current window to add mode, except it will populate the form with the previous record's values for fast record entry.

The key field for name plates is 'CUID' and is automatically populated for you. No other information is required to save the form. However, you should enter as much information as you can to differentiate the name plate from others. Click 'Save New Record' to save the new asset. 'Cancel Changes' will discard the new asset information.




### Editing Name Plates


The form for editing name plate information can also be accessed from either the list or detail views. From the list, click the pencil icon. From the detail view, click the 'Edit' link in the menu bar. Both links will open the edit form in the existing window.

The 'Edit' form is similar to the 'Add' form, except that the key field cannot be edited.

Click 'Save Changes' to save the changes or 'Cancel Changes' to discard them. The form will return to the detail view of the name plate.

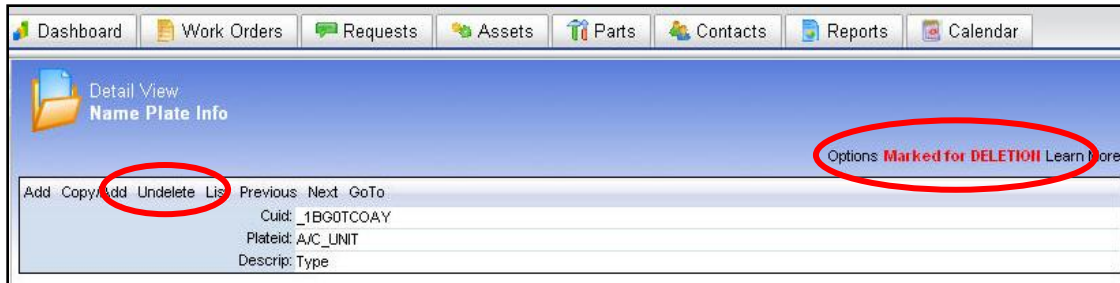
### Editing In Place

If "Edit In Place" is enabled, you can make changes to most fields without the need for entering edit mode. Enter the record's detail screen by clicking on the Magnifying Glass icon or the Cuid link on the list view. Place your mouse cursor over the field you wish to edit. If the field is able to be edited, the cursor will change to a pencil . Double-click your left mouse button and the field will open in edit mode. Make your changes then click the save  icon to save your changes or click the cancel icon  to return without saving.

If a field cannot be edited with Edit In Place, the cursor will change to a "no" symbol . If editable, these fields require you to enter 'Edit' mode to make any adjustments.

### Deleting Name Plates

Deleting records is a two step process. The first step is to mark the record for deletion by clicking the 'Delete' link. This removes the record from the list view but still allows you to locate it by using the 'GoTo' link (if you know the record's ID) or using the 'Next' and 'Previous' links to page through the records. At this point, you can still un-delete the record by clicking the 'Un-delete' link.



The second step of the deletion process is to completely remove the records from system. Go to the Remove Deleted Records link located in the Administration menu. This list displays the various tables that can hold records marked for deletion. Click the magnifying glass icon to preview items that will be deleted. Click the trash can icon to remove all the records for that section. For more information on deleting items, see the System Administration manual.

*NOTE: The Remove Deleted Items option permanently removes records. There is no way to bring them back. Use this feature at your own risk.*

### **Adding Name Plates to Assets**

To utilize the name plate feature, go to the asset and scroll to the bottom of the detail view. There are two ways to add name plates to an asset. The Import Attributes option adds all name plates with a matching Plateid. The Add option will add a single record to the list.

### **Importing Plate IDs**

In the Name Plate Information section of the asset detail screen (see illustration on page 22), click the 'Import Attributes' link. You will be taken to the screen below which will allow you to select an Attribute list (Plate ID group) from a drop down list.



When you click the 'Copy List Attributes' button, all of the field descriptions available for that PlateID will drop into the Name Plate Information section for that asset.



Name Plate Information			Add   Options	Import Attributes   [-]
GoTo	Plateid	Descrip		Value
GoTo	COMPRESSOR	Type		
GoTo	COMPRESSOR	Serves		
GoTo	COMPRESSOR	Manufacturer		
GoTo	COMPRESSOR	Local Representative		
GoTo	COMPRESSOR	Model Number		
GoTo	COMPRESSOR	Serial Number		
GoTo	COMPRESSOR	Capacity (SCFM)		
GoTo	COMPRESSOR	Pressure (PSIG)		
GoTo	COMPRESSOR	Receiver Size		
GoTo	COMPRESSOR	Motor:		
GoTo	COMPRESSOR	Manufacturer		
GoTo	COMPRESSOR	Model Number		
GoTo	COMPRESSOR	Serial Number		
GoTo	COMPRESSOR	HP		
GoTo	COMPRESSOR	RPM		
GoTo	COMPRESSOR	Amps		
GoTo	COMPRESSOR	Volts		
GoTo	COMPRESSOR	Phase		
GoTo	COMPRESSOR	HZ		
GoTo	COMPRESSOR	Frame		
GoTo	COMPRESSOR	Misc 1		
GoTo	COMPRESSOR	Misc 2		
Sub				
Total				

Click the 'GoTo' link to add the values for each field. If any of the Name Plate fields are not necessary for this asset, click the 'GoTo' link to delete the individual fields from the list for this asset.

Edit	Delete	
	Cuid: _27L00XSQD	
	Compid: 1003	
	Plateid: COMPRESSOR	
	Descrip: Serves	
	Value:	

### Adding Nameplates Directly

If you want to add individual lines to the Name Plate information box click the 'Add' link and you will see the screen below.

Dashboard | Work Orders | Requests | **Assets** | Parts | Contacts | Reports | Calendar

---

**Detail View**  
Nameplate Attributes

[Go Back](#)  
Options: Learn More

---

Save New Record | Cancel Changes

Cuid: \_27L0P6HXX key field

Compid: 1003

Plateid:

Descrip:

Value:

Fill in the Plateid and Description fields. Notice that the value field is revealed for updating as well.

*NOTE: If you add a Name Plate from the asset instead of the Name Plate List option on the main menu, the asset ID (Comp ID) will be displayed automatically indicating that this Name Plate will only show on this asset and won't be available in the main name plate list.*

## Preventive Maintenance

Preventive maintenance, or PM, allows you set up routine procedures to keep your assets running smoothly.

### Establishing Preventive Maintenance (PM) Tasks

PM Tasks is a feature that can save you an enormous amount of time when creating PMs for your assets. Normally, you would enter a PM's description each time which can be a daunting task when you're creating several PMs. A PM task allows you to create one, very descriptive, maintenance procedure and then associate that PM task to your PM schedule(s).

Another benefit of using PM tasks is the ability to make any changes to a task then 'Publish' the changes to all the PMs (PM schedules) s that are linked to the task.

**TIP:** Each eMaint X3 account comes pre-loaded with a PM Library which lists common Preventive Maintenance tasks on common equipment. You can use this list to help you build your own PM Task list.

### List View

In the Navigation tab, click the PM Task link to display the Tasks File Listing.

Task No.	Brief Task Desc.
<a href="#">A-001</a>	Air Compressor 90 Day Service
<a href="#">HVAC-01</a>	HVAC System Check
<a href="#">TRUCK-15</a>	15,000 Mile Service

The PM tasks are displayed in rows with column headers at the top of each row. Note that each PM task displayed in the list has its 'Task No.' underlined. This means you can click the Task No. to see the PM task record in detail. To the left of each row are two icons. The magnifying glass icon will open the detail record of the PM task. The pencil icon will open the PM task record in edit mode.

From this screen you can add a new record to the list by clicking 'Add New Record' in the upper right corner. If any changes were made to a PM task while this window was open, click 'Refresh' to reload the page. The 'Learn More' link provides a brief description of the list view and how to navigate around it. To close the window and return to the main menu, click the 'Close Window' link in the upper right corner.

Click the 'Form Options' link at the bottom of the list to change the default settings of how this screen is displayed. This feature is described in more detail in the System Administration training manual.

### **Searching your PM Tasks**

You can expand your search further by applying sorts and/or filters.

#### Sorting the list

Click on one of the column headings and the list will sort in ascending order. Once sorted, a small arrow icon (pointing up) will appear to the right of the column name. This indicates that the list is sorted in ascending order. Click the arrow icon and the list will sort again, this time in descending order.

Applying Filters to the List

Filters are used to search the whole list and display the matching results. For example, if you wanted to see only the tasks with a Task No. that begins with the letter 'S', you would type the letter 'S' in the filter for the Task No. column and then click the red 'Set' link to the left of the filter row. Besides displaying the results, the number of records that matched the filter expression will display in the upper left of the screen. You can apply single or multiple filters at one time if needed.

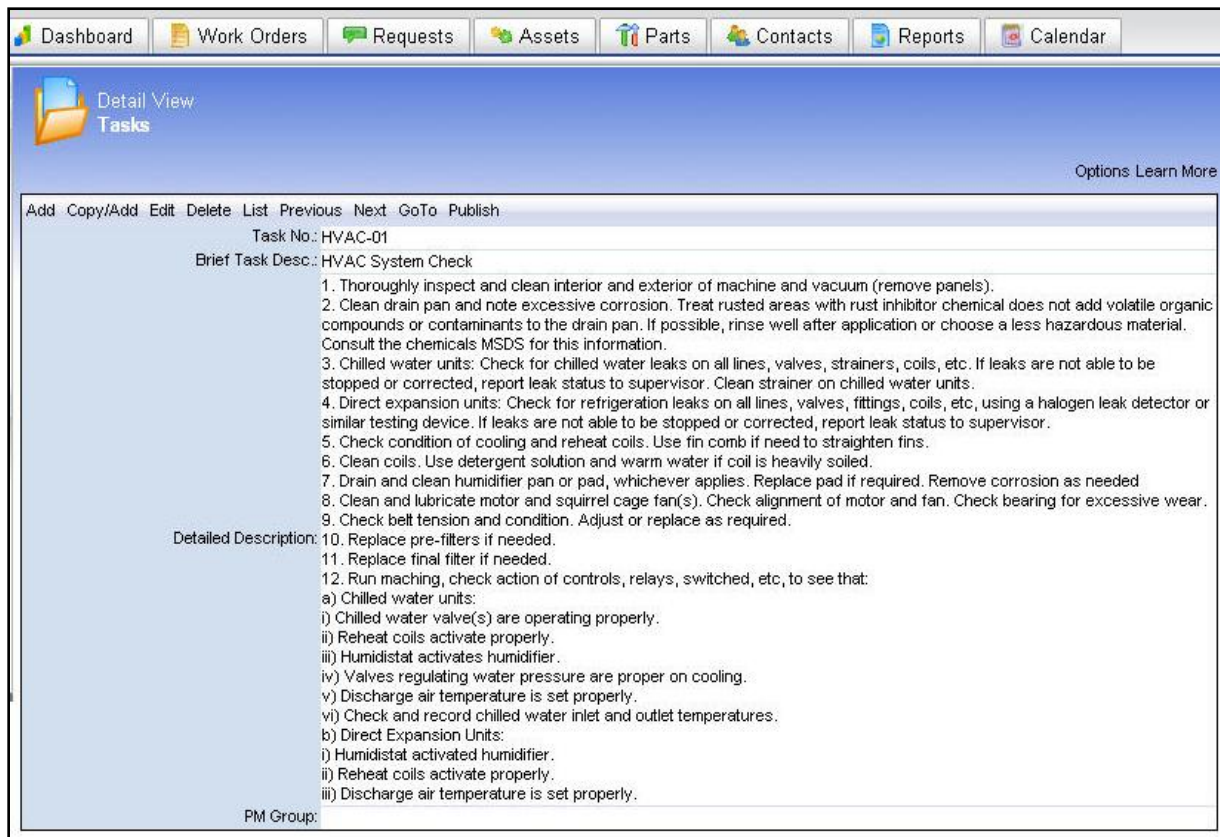
To remove the filters, click the red "Clear" link. The full list will display.

**TIP:** The system remembers the filters and sorts that you apply and will display it the next time you navigate to that list.

Detail View

The PM Task detail screen has a Task Number field to use for creating a unique alphanumeric ID for the task. The Brief Description field is for defining the task. The Detailed Description is an unlimited text field that can contain as much information as you wish.

The PM Group field is used for defining or assigning a group identifier to a PM task in order to manage a group of PMs and to adjust the schedule of PMs as a group rather than adjusting the schedules individually. The PM Group can either be assigned at the PM Task level on this screen or at the PM Schedule level when establishing a new PM schedule for a piece of equipment.



The additional options available for the name plate detail include:

**Add** – Opens a blank record for entering a new name plate.

**Copy/Add** – Opens a new record in Add mode and populates the form with the previous record's values.

**Edit** – Opens the record in Edit mode for changing a PM task's information.

**Delete** – Marks the record for deletion and removes it from the list view.

**List** – Returns to the list view.

**Previous** – Displays the detail of the previous record (ordered by ID).

**Next** – Displays the detail of the next record (ordered by ID).

**GoTo** – Opens a window that allows you to navigate directly to a record by entering the Contact ID.

**Publish** – Applies any changes made to this PM task to all assigned assets.

### Adding PM Tasks

You can add new PM tasks from either the list or detail view. From the list view, the 'Add New Record' link is directly above the field headers and will open a new window in add mode. From the detail view, the 'Add' choice is the first in the main menu bar and will change the current window to add mode. The 'Copy/Add' option also changes the current window to add mode, except it will populate the form with the previous record's values for fast record entry.

The key field for PM tasks is 'Task No.' and must be entered before 'Save New Record' is pressed. However, you should enter as much information as you can to differentiate the asset from others. Click 'Save New Record' to save the new asset. 'Cancel Changes' will discard the new asset information.




### Editing PM Tasks


The form for editing PM task information can also be accessed from either the list or detail views. From the list, click the pencil icon. From the detail view, click the 'Edit' link in the menu bar. Both links will open the edit form in the existing window.

The 'Edit' form is similar to the 'Add' form, except that the key field cannot be edited.

Click 'Save Changes' to save the changes or 'Cancel Changes' to discard them. The form will return to the detail view of the PM task.

### Editing In Place

If "Edit In Place" is enabled, you can make changes to most fields without the need for entering edit mode. Enter the record's detail screen by clicking on the Magnifying Glass icon or the Task No. link on the list view. Place your mouse cursor over the field you wish to edit. If the field is able to be edited, the cursor will change to a pencil . Double-click your left mouse button and the field will open in edit mode. Make your changes then click the save  icon to save your changes or click the cancel icon  to return without saving.

If a field cannot be edited with Edit In Place, the cursor will change to a "no" symbol . If editable, these fields require you to enter 'Edit' mode to make any adjustments.

### Deleting PM Tasks

Deleting records is a two step process. The first step is to mark the record for deletion by clicking the 'Delete' link. This removes the record from the list view but still allows you to locate it by using the 'GoTo' link (if you know the record's ID) or using the 'Next' and 'Previous' links to page through the records. At this point, you can still un-delete the record by clicking the 'Un-delete' link.



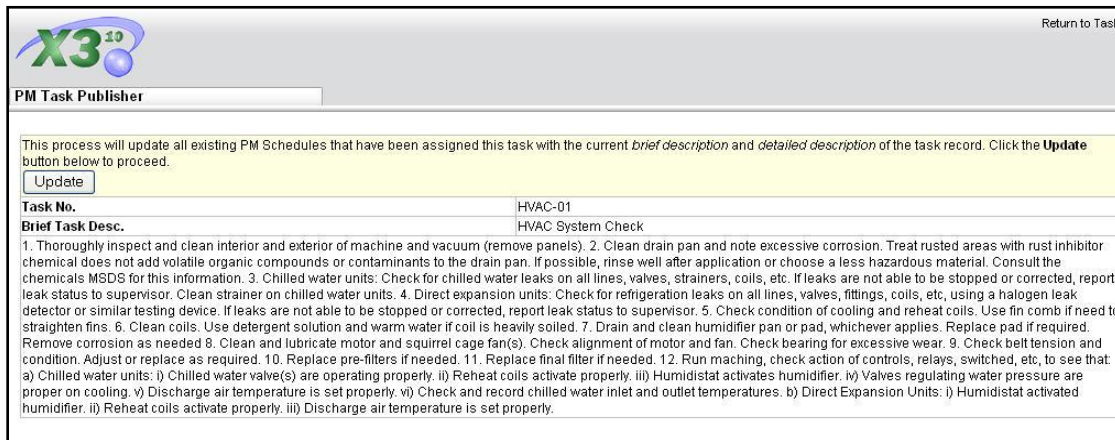
The second step of the deletion process is to completely remove the records from system. Go to the Removed Deleted Records link located in the Administration menu. This list displays the various tables that can hold records marked for deletion. Click the magnifying glass icon to preview items that will be deleted. Click the trash can icon to permanently remove all the records for that section. For more information on deleting items, see the System Administration manual.

*NOTE: The Remove Deleted Items option permanently removes records. There is no way to bring them back. Use this feature at your own risk.*

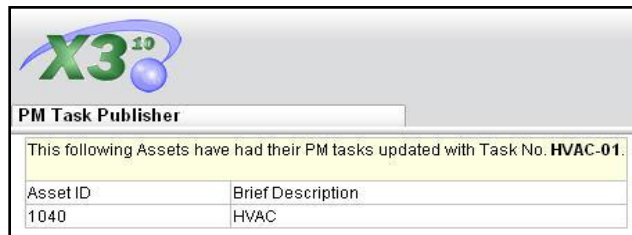
### Publishing PM Tasks

If you have made any changes to a PM task, the 'Publish' link applies the changes to all PMs that the task is assigned to.

After making changes to the PM task, click the 'Publish' link. A confirmation screen will appear with the changes you made to it.



Confirm your changes and click 'Update'. A window will appear with a list of assets that were updated. Click 'Return To Task' to return to the PM task detail.



## Establishing PM schedules on Assets

The PM display and editing tools are located in the standard view of the asset detail form (see page 22). All PMs that have been scheduled for an Asset will be listed under the PM Schedule section. If the PM Schedule section is blank on an asset record, it means you have not yet established a PM schedule for that asset. To add a new schedule, click the 'Add' link in the right-hand corner of the PM Schedule section for that asset. You can access an existing PM schedule on an asset for viewing, editing, or deleting by clicking the 'GoTo' link to the left of the schedule.

<a href="#">Dashboard</a>   <a href="#">Work Orders</a>   <a href="#">Requests</a>   <b><a href="#">Assets</a></b>   <a href="#">Parts</a>   <a href="#">Contacts</a>   <a href="#">Reports</a>   <a href="#">Calendar</a>	
<b>Detail View</b> <b>PM</b>	
<a href="#">Go Back</a> <a href="#">Options</a> <a href="#">Learn More</a>	
Edit Delete Manually Generate	
Pmid: <input type="text" value="_23F1CN2SB"/> Asset ID: <input type="text" value="1003"/> Work Order Type: <input type="text" value="PM"/> PM Group: <input type="text"/> Est. Hours: <input type="text" value="2"/>	Last PM Work Order Date: <input type="text" value="10/03/07"/> Last PM Work Order No.: <input type="text" value="134"/> On Calendar?: <input checked="" type="checkbox"/> True Route: <input type="text"/> Route Sequence: <input type="text"/>
<b>Calendar Based</b> Produce Every?: <input type="text" value="90"/> Calendar Based Freq.: <input type="text" value="Days"/> Calendar Freq Type: <input type="text" value="Static"/> Next PM Date: <input type="text" value="01/01/08"/> Suppress PM (Calendar): <input type="checkbox"/> False Nesting Group: <input type="text"/> Nesting Level: <input type="text" value="0"/>	<b>Meter Based</b> Produce PM Every: <input type="text" value="0"/> Occurs Desc.: <input type="text"/> Meter Type: <input type="text" value="N/A"/> Daily Average: <input type="text" value="0"/> Last Meter Reading Entry: <input type="text"/> Last Meter Reading Date: <input type="text"/> Last PM Produced At: <input type="text"/> Meter To-Date: <input type="text"/> Meter Freq. Type: <input type="text" value="Static"/> Suppress PM (Meter): <input type="checkbox"/> False
Suppress PM: <input type="checkbox"/> False Suppress Reason: <input type="text"/>	
Assign To Type: <input type="text" value="Employee"/> Assign To: <input type="text" value="Acme Company (Jeff Werth)"/> Perform For Type: <input type="text" value="Other"/> Perform For: <input type="text"/>	Skip Mondays?: <input type="checkbox"/> False Skip Tuesdays?: <input type="checkbox"/> False Skip Wednesdays?: <input type="checkbox"/> False Skip Thursdays?: <input type="checkbox"/> False Skip Fridays?: <input type="checkbox"/> False Skip Saturdays?: <input type="checkbox"/> False
Task No.: <input type="text" value="A-001"/> Brief Description: <input type="text" value="Air Compressor 90 Day Service"/>	
Detailed Description:	<ol style="list-style-type: none"> <li>1. Perform normal four checks and operations.</li> <li>2. Change compressor crankcase oil.</li> <li>3. Clean air intake filter.</li> <li>4. Check air dryer, automatic condensate drains, and air tank for proper operation. Clean condenser coils and cover grills.</li> <li>5. Inspect belt alignment and condition. Adjust or replace belts as required.</li> <li>6. Check for corrosion and scale on water cooled units.</li> <li>7. Clean heat exchange surfaces.</li> <li>8. Check accuracy of gauges with calibrated test gauge.</li> <li>9. On two stage compressor, check intermedite pressure.</li> <li>10. Test relief valves, replace if leaking or the relief range is incorrect. Do not readjust safety relief valves in the field.</li> <li>11. Check operation of compressor unloaders, repair or replace if not loading and unloading properly.</li> <li>12. Check compressor suction and discharge valves for proper operation. Replace leaking valves.</li> <li>13. Check cut in and cut out compressor pressure controller, readjust if necessary for proper air pressure requirements. Do not exceed ASME maximum tank pressure.</li> <li>14. Check to make sure belt guard is installed prior to putting air compressor back in service.</li> <li>15. No pressure vessel is to have its hand hole or man hole covers removed unless the vessel is at atmospheric pressure.</li> </ol>

The options available for the PM detail include:

**Edit** – Opens the record in Edit mode for changing a PM task's information.

**Delete** – Marks the record for deletion and removes it from the list view.

**Manually Generate** – Generates the PM on demand, applying today's date as the work date, instead of waiting for the next scheduled generation.

### Adding PMs

Click the 'Add' link on the PM Schedule section to add PMs to your asset. PMs can be calendar based, meter based, or both. The calendar and meter sections within the PM Schedule form are color coded to help differentiate them.

#### **General fields to enter:**

- The work order type (usually PM).
- Whether it should be listed on the Maintenance Calendar.
- The route and route sequence. These fields are optional and are covered in the Work Order Level 2 manual.
- The PM Group. If a PM Task is used, this field will auto-fill from that table. This field that may be left blank. (PM grouping is explained in detail in the Work Order Management Level 2 manual).
- The employee or contractor that is assigned to this PM task when it becomes a work order. This optional field is linked to the Maintenance Contacts file.
- The maintenance contact that this PM task will be performed for. This optional field is linked to the Maintenance Contacts file.
- The standard number of hours normally required to perform this task (optional).
- The Brief Description and Work Description fields. If you are using a PM Task, click the yellow file folder next to the 'Task No.' field to display the task list and click the 'Select' link on the appropriate task. The Task No., PM Group, Brief Description and the Work Description fields fill in automatically. If for some reason you want to enter a brief description and work description directly without picking from the PM Tasks List, you may do so as well.
- The Weblink, which lets you establish a link between the record and an external document - either a Web page or a document residing on your network.
- Suppress PM, which tell the PM schedule to pause running as an active schedule. The schedule will remain paused until it is manually set back to "False." (Suppression settings are explained in detail in the Work Order Management Level 2 manual).

#### **On a Calendar-based PM:**

- The frequency of the PM. (For example, if it is to be performed every six months, enter the number '6' in the 'PM Every' field and click on 'Months' in the 'Calendar Based Freq' field.)
- Whether it is Static or Shadow (static is the default).
- The Next PM date, that is, the date on which this PM should be generated as a new, open PM work order.

#### **On a Meter-based PM:**

- The Produce PM Every field. This is the number on the meter.
- Occurs Desc. is the meter's value. Example: Miles, Hours, Units, etc.
- Meter Type describes the meter as a value that is updated with each reading (Running) or is a value that is added to the last reading (Totals).
- What the daily average is for the meter.
- The Meter-to-Date.

*NOTE: Advanced PM features such as "Suppress if Open" type Calendar option and "Shadowed Meter" are available and are explained in full detail in the Work Order Level 2 training manual.*

### Editing PMs

The form for editing PMs can only be accessed from an asset's detail view. From the PM Schedule table on the asset, click the 'GoTo' link on the PM's line to display the PM's detail view. On that screen, click the 'Edit' link in the menu bar. The PM will open in edit mode in the existing window.

Click 'Save Changes' to save the changes or 'Cancel Changes' to discard them. The form will return to the detail view of the asset.

### Editing In Place

If "Edit In Place" is enabled, you can make changes to most fields without the need for entering edit mode. On the asset detail, click on the PM Schedule's GoTo link to access the PM Schedule's detail form. Place your mouse cursor over the field you wish to edit. If the field is able to be edited, the cursor will change to a pencil . Double-click your left mouse button and the field will open in edit mode. Make your changes then click the save icon to save your changes or click the cancel icon to return without saving.

If a field cannot be edited with Edit In Place, the cursor will change to a "no" symbol . If editable, these fields require you to enter 'Edit' mode to make any adjustments.

### Deleting PMs

Deleting records is a two step process. The first step is to mark the PM for deletion by clicking the 'Goto' link of the PM and then click 'Delete' on the PM form. This highlights the record in red on the list view when you return to the asset detail. At this point, you can still un-delete the record by clicking the 'Un-delete' link.

PM Schedule							Add	Options	Copy PM Schedule	Learn More[-]
GoTo	Produce Calendar Based Every? Freq.	Calendar Freq Type	Next PM Date	Last PM Work Meter Order No. Type	Occurs Desc.	Last Meter Reading	Last PM Work Order Entry Date	Est. Hours		
<a href="#">GoTo</a>	1.00 Weeks	Shadow		1244 TOTALS		0.00	10/14/2007	0.00		
<a href="#">GoTo</a>	1.00 Months	Shadow		0 TOTALS UNITS		0.00		0.00		
Sub										
Total										

The second step of the deletion process is to completely remove the record from the system. Go to the Remove Deleted Records link located in the Administration menu. This list displays the various tables that can hold records marked for deletion. Click the magnifying glass icon to preview items that will be deleted. Click the trash can icon to remove all the records for that section. For more information on deleting items, see the System Administration manual.

*NOTE: The Remove Deleted Items option permanently removes records. There is no way to bring them back. Use this feature at your own risk.*

### Manual Generation

This feature allows you to bypass the assigned schedule for the PM and generate the PM on demand. It will also reset the time/meter to the next PM. For example, if your monthly PM is 2 weeks into its scheduled generation date and you manually generate it, the PM will reset and be generated in one month.

*NOTE: There is no confirmation for manual generation. Clicking the 'Manually Generate' button will immediately turn the PM into a work order and display the work order.*

### Copy PM Schedule

The Copy PM Schedule feature allows you to copy the existing PM Schedule to other assets in your system. This feature is covered in the Work Order Management Level 2 manual.



## PM Parts

The PM parts table displays any parts required to perform the maintenance.

PM Parts				Add   Options   Learn More[-]
Item	Descrip	Invloc	Auto Issue Qty	Units
<a href="#">Go To</a> 2122	T & P Relief Valve	MAIN	1.00	EA
<a href="#">Go To</a> 2005	Bearing, 6204-2RSJEM	MAIN	3.00	EA
Sub				
Total				

Any items listed here will be placed on the work order's HTML printout (system option required, see page 9) and the close out screen under the "Select parts charges to issue" section (not shown if no items exist).

To add a PM Part, click the 'Add' link on the right side of the table.

The fields to enter here:

- Enter a Category for the part. Choose from Lubricant, Spare or Replacement. Additional categories can be selected by editing the field's lookup properties. See the System Administration manual for customizing fields.
- Use the lookup to display your Parts list. Choose the part by clicking the 'Select' link on the left side of the part. The 'Item' and 'Descrip' fields will automatically populate with your selected parts information.
- If you have the Multiple Inventory Module enabled on your account, select the location of the part in the drop-down list. If the Multiple Inventory Module is not installed on your account, only 'Main' will be available on the drop-down list.
- Enter the number of items you want to automatically issue to the work order and the recommended quantity in the 'Auto Issue Qty' and the 'Recommended Qty' fields.
- If the part being issued is a measureable item, enter the unit of measure in 'Units'.

Click 'Save New Record' to save the part to the PM, or click 'Cancel Changes' or 'Go Back' to return to the PM without saving.

## PM Procedures

If you have detailed descriptions of the procedures required to complete a PM and you would like it to be added to the work order when it's generated, add it to the PM Procedure table.

PM Procedures				Add   Options   Learn More[-]	
GoTo	Sequence	Task #	Task Description	Standard Time	Task Details
	1.00	A-001	Air Compressor 90 Day Service	1.25	1. Perform normal tour checks and operations. 2. Change compressor crankcase oil. 3. Clean air intake filter. 4. Check air dryer, automatic condensate drains, and air tank for proper operation. Clean condenser coils and cover grills. 5. Inspect belt alignment and condition. Adjust or replace belts as required. 6. Check for corrosion and scale on water cooled units. 7. Clean heat exchange surfaces. 8. Check accuracy of guages with calibrated test guage. 9. On two stage compressor, check intermedite pressure. 10. Test relief valves, replace if leaking or the relief range is incorrect. Do not readjust safety relief valves in the field. 11. Check operation of compressor unloaders, repair or replace if not loading and unloading properly. 12. Check compressor suction and discharge valves for proper operation. Replace leaking valves. 13. Check cut in and cut out compressor pressure controller, readjust if necessary for proper air pressure requirements. Do not exceed ASME maximum tank pressure. 14. Check to make sure belt guard is installed prior to putting air compressor back in service. 15. No pressure vessel is to have its hand hole or man hole covers removed unless the vessel is at atmospheric pressure.

PM Procedures links with the PM Tasks. When used, the PM Procedures will be generated with the PM and be placed in the Work Order's 'Procedures' table.

To add a PM Procedure, click the 'Add' link on the right side of the PM Procedure table,

The fields to enter are:

- If there is more than one procedure, enter this procedure's number sequence here.
- Use the file lookup on 'Task Description' to open the PM Task list. Choose a task by clicking the 'Select' link on the left of the task. 'Task Description' and 'Task Details' will automatically populate with the PM Tasks information.
- You can link to a local file, web address or email by entering the value in 'Web Link'. The 'File' button will open the window to help you choose a file on your machine or local network.
- Enter the time the procedure should take in the 'Standard Time' field.

Click 'Save New Record' to save the procedure to the PM, or click 'Cancel Changes' or 'Go Back' to return to the PM without saving.

## PM Generation

There are two methods available for generating PM Work Orders: manual or automatic.

### Manual PM Generation

PM Work Orders are manually generated with the 'Manually Generate' link on the individual PM schedules or the menu item called 'Generate PM Work Orders'. To generate a single PM with today's date, click 'Manually Generate' from the PM schedule itself. You will be immediately shown the new work order in a separate window. You can print or email from that screen.

If you wish to generate a group of PMs at once, use the 'Generate PM Work Orders' menu option (shown below) and indicate the date through which the PM's should be generated. It is optional to utilize any of the filters.

The screenshot shows the 'PM Generation' form with the following fields:

- PM Group Filter:** Select All (dropdown)
- Route Filter:** Select All (dropdown)
- Sub Asset of Filter:** Select All (dropdown)
- Assignment Filter:** Select All (dropdown)
- Generate Through:** Oct 8 2007 (calendar)
- Option:**  Generate Future PM's?
- Action:** Preview PM's (dropdown)
- Buttons:** Proceed

Click 'Proceed' to preview the PM's that are due to be generated through the date indicated. The list of PM's to be generated will appear on screen.

The screenshot shows the 'PM Generation' form with the 'Action' dropdown set to 'Preview PM's'. Below the form is a table of 'Calendar-based Work Orders':

WO No.	WO Date	Route No.	Route Seq.	Asset ID	Asset Description	Task Desc.	PM Every	Last PM Work Order Date	Last PM Work Order No.	Last WO Status
PREVIEW C	10/03/2007			1003	Compressor, Air	Air Compressor 90 Day Service	90 Days	08/26/2007	121	Open
<input checked="" type="checkbox"/>					Acme Company (Jeff Werth)					OVERDUE
PREVIEW C	10/08/2007			1040	HVAC	HVAC System Check	1 Months	10/10/2007	132	Open
<input checked="" type="checkbox"/>					Acme Company (Jeff Werth)					
PREVIEW C	10/05/2007			1019	Compressor - Air	Air Compressor 90 Day Service	3 Months	10/06/2007	131	Open
<input checked="" type="checkbox"/>					Acme Company (Jeff Werth)					OVERDUE

Use the drop-down list under 'Action' and select 'Generate PM's', then click Proceed. The resulting PM work orders will be listed with the work order numbers assigned. Above the list of generated work orders are options to either 'PRINT these PM Work Orders' or 'EMAIL these PM Work Orders.' Select the output that you desire by clicking either option.

The screenshot shows the 'PM Generation' form with the 'Action' dropdown set to 'Generate'. Below the form is a table of generated work orders with 'Print and Email Options' buttons:

WO No.	WO Date	Route No.	Route Seq.	Asset ID	Asset Description	Task Desc.	PM Every	Last PM Work Order Date	Last PM Work Order No.	Last WO Status
134	10/03/2007			1003	Compressor, Air	Air Compressor 90 Day Service	90 D	10/03/2007	134	Open
					Acme Company (Jeff Werth)					OVERDUE
135	10/08/2007			1040	HVAC	HVAC System Check	1 M	10/06/2007	135	Open
					Acme Company (Jeff Werth)					OVERDUE
136	10/05/2007			1019	Compressor - Air	Air Compressor 90 Day Service	3 M	10/05/2007	136	Open
					Acme Company (Jeff Werth)					OVERDUE

Buttons: PRINT these PM Work Orders, EMAIL these PM Work Orders

These open PM work orders that appear on the list are now available in the Work Order Center. To see the detail of one of the work orders on the list, click on the individual work order number and the work order will display in a new screen. The Asset and the Last PM Work Order No. links can also be clicked to view its details in a new window.

### **Manual Generation (On Demand)**

On the toolbar of each PM schedule detail screen, there is a link called “Manually Generate.” This feature allows you to bypass the assigned schedule for the PM and generate the PM on demand. It will also reset the time/meter to the next PM. For example, if your monthly PM is 2 weeks into its scheduled generation date and you manually generate it, the PM will reset and be generated in one month.

### **Automatic PM Generation**

Before the system will generate PMs automatically, certain settings must be in place. These settings are located in the ‘PM Settings’ section of the ‘Change Your Settings’ menu option. To permit automatic PM generation:

- Make sure the ‘Disable Daily PM Generation & Email’ is not checked.
- Indicate the File Type for the emails.
- Enter the time the PMs are to be generated.
- Click ‘Save PM Email Settings’ to save the settings.

This setting also allows you to designate who the system will notify when PMs are generated.

*NOTE: In order for the ‘Assign To’ and the ‘Perform For’ contacts to receive the work orders via email, the individuals must be listed in the Maintenance Contacts and have a valid email address in the appropriate field.*

## Using the Calendar

The Calendar allows you to view projected PMs and existing work orders on any given date, aiding you in the process of managing your work load. Viewing PMs on the calendar requires that your PM Schedules have the 'On Calendar' field set to 'True'.

ID	Asset ID	Date	Description	Est. Hours	Assign To	Type
<a href="#">132</a>	<a href="#">1040</a>	10/10/2007	HVAC System Check	2	1006	Work Order
<a href="#">_273150NDE</a>	n/a	10/10/2007	Perform a visual inspection of each asset. Report	0	ACME01	Reminder

### The Calendar List

The Calendar screen shows a calendar display on the left side and a listing of the day's activities on the main panel.

The calendar itself shows today's date in a blue background and days with activities in a green background. Clicking any date on the calendar will list the activities on the main panel. To move from month to month, use the arrow buttons located at the top-right and top-left of the calendar.

The main panel shows your activities in a list. Located at the top of the list are three buttons. By default, today's date is displayed when you click the Calendar tab. If you navigate from it, the "Today" button will return you to today's date. The "Entire Month" button will list all the activities in the currently selected month. The "Add Reminder" button will open the reminder page in add mode. See the next section for more details.

The main panel's columns are:

**ID** – The ID of the activity. Click this link to access the activity's detail form in another window for a more detailed description or to make adjustments.

**Asset ID** – If the ID is a projected PM or a work order, the asset will be listed here in this column. Click the ID to open the asset detail form in another window.

**Date** – The date the activity is to take place (PM or reminder), or the date the activity was added (work order).

**Description** – The description of the activity. This is pulled from the 'Brief Description' field on the work order, PM or reminder.

**Est Hours** – The estimated amount of hours the activity will take to complete.

**Assign To** – For PMs and work orders, this is the person listed in the 'Assign To' field. For reminders, this is the person listed in the 'For User' field.

**Type** – The type of activity. Options are 'Work Order', 'Projected PM' and 'Reminder'.

## Adding A Reminder

The "Add Reminder" button lets you add activity to the calendar to keep you informed of any activity, eMaint related or not.

The screenshot shows the 'Detail View' for the 'Maintenance Calendar'. At the top, there are navigation options: 'Options', 'Learn More', and 'Close Window'. Below this, there are two buttons: 'Save New Record' and 'Cancel Changes'. The form contains the following fields:

- Activityid: 27M10UL8N (marked as a key field)
- Activity Date: Oct 24 2007 (with a calendar icon)
- Type: (empty text box)
- For User: (empty text box)
- Brief Description: (empty text box)
- Detailed Description: (HTML Editor)
- Send Reminder?: False (dropdown menu)
- Date of Reminder: --- -- 2007 (with a calendar icon)
- Email Reminder To: (empty text box)
- Complete: False (dropdown menu)
- Completed By: --- -- 2007 (with a calendar icon)
- Email Me When Complete?: False (dropdown menu)

Fill in the fields on the form with as much detail about the activity as you wish. The system will send you a reminder to the email address(s) listed in the 'Email Reminder To' field if you mark 'Send Reminder' to "True" and enter a date in the 'Date of Reminder' fields. Click 'Save' in the upper left corner to save the reminder. Your new activity will appear on the main panel on the day listed in "Activity Date".

## Work Order Center

The heart of eMaint X3 is work order management. Work orders are the vehicles for recording the activities you perform, the physical documents you provide the people performing the work, and the tracking device for all related activities. The Work Order tab is the central location for all work performed in eMaint.

### The List View

Clicking the Work Order tab displays all the work order listings, enabling you to view the complete list of work orders in your system.

WO No.	WO Date	Asset ID	Asset Description	WO Type	Priority	Status	Sched. Date	Work Order Status
<a href="#">137</a>	10/18/2007	1005	Truck	CORRECTIVE	3	O		Active
<a href="#">136</a>	10/05/2007	1019	Compressor - Air	PM		O		
<a href="#">135</a>	10/08/2007	1040	HVAC	PM		O		
<a href="#">134</a>	10/03/2007	1003	Compressor, Air	PM		O		Active
<a href="#">133</a>	10/08/2007	1010	PL-2 Cut Off Saw	CORRECTIVE	3	O		Active
<a href="#">132</a>	10/10/2007	1040	HVAC	PM		O		
<a href="#">131</a>	10/06/2007	1019	Compressor - Air	PM		O		
<a href="#">130</a>	09/14/2007	1005	Truck	CORRECTIVE	2	O	10/01/2007	Active
<a href="#">129</a>	09/14/2007	1002	Oil Furnace	CORRECTIVE	2	O	09/14/2007	Active
<a href="#">128</a>	09/14/2007	1040	HVAC	CORRECTIVE		H	09/17/2007	Active
<a href="#">127</a>	09/10/2007	1004	Generator, Standby	CORRECTIVE	3	O	09/17/2007	Active
<a href="#">126</a>	09/10/2007	1040	HVAC	PM	2	O	09/20/2007	Active
<a href="#">125</a>	09/09/2007	1001	Hot Water Tank	CORRECTIVE	2	O		Active
<a href="#">124</a>	09/07/2007	2002	Power Transformer	CORRECTIVE		H	09/07/2007	
<a href="#">123</a>	09/06/2007	1005	Truck	CORRECTIVE	2	O	09/17/2007	Active
<a href="#">122</a>	09/04/2007	BOX_01	Box Lifter	CORRECTIVE		H	09/05/2007	
<a href="#">121</a>	08/26/2007	1003	Compressor, Air	PM		O		Active

Each work order displayed in the list has its WO No. underlined. This means you can click the work order number to see the record in detail. To the left of each row are a magnifying glass icon and a pencil icon. You can click the magnifying glass icon to see the detail record of the work order. You can click the pencil icon to edit the work order record.

From this screen you can add a new work order to the list by clicking 'Add New Record' in the upper right corner. If any changes were made to a work order while this window was open, click 'Refresh' to reload the page. The 'Learn More' link provides a brief description of the list view and how to navigate around it. To close the window and return to the main menu, click the 'Close Window' link in the upper right corner.

Click the 'Form Options' link at the bottom of the list to change the default settings of how this screen is displayed. This feature is described in more detail in the System Administration training manual.

### Searching your Work Orders

You can expand you search further by applying sorts and/or filters.

### Sorting the list

Click on one of the column headings and the list will sort in ascending order. Once sorted, a small arrow icon (pointing up) will appear to the right of the column name. This indicates that the list is sorted in ascending order. Click the arrow icon and the list will sort again, this time in descending order.

### Applying Filters to the List

Filters are used to search the whole list and display the matching results. For example, if you wanted to see only those work orders whose 'WO Type' begins with the letter 'P', you would type the letter 'P' in the filter for the 'WO Type' column and then click the red 'Set' link to the left of the filter row. Besides displaying the results, the number of records that matched the filter expression will display in the upper left of the screen. You can apply single or multiple filters at one time if needed.

To remove the filters, click the red "Clear" link. The full list will display.

**TIP:** The system remembers the filters and sorts that you apply and will display it the next time you navigate to that list.

### Detail View

Clicking on the WO No. or on the magnifying glass on the work order list view will open the detail view of a work order (see below).

**Detail View Work Orders** Options Learn More

Add Copy/Add Edit Delete List Previous Next GoTo Close Out Print Purchase

WO No.: 103	Status: H
WO Date: 05/28/07	Completed Date: 06/21/07
WO Type: PM	Downtime: 0
Sched. Date:	Problem Type:
Est. Hours: 2	Work Order Status:
Asset ID: <a href="#">1003</a>	Project #:
Asset Description: Compressor, Air	Priority:
Building: Main	Req. Telephone:
Floor: Ground	Req. E-mail:
Request #: <a href="#">Go To</a>	Perform For Type: Other
Requested By: P.M. Schedule	Perform For:
Assign To Type: Employee	
Assign To: Acme Company (Jeff Werth)	

**Brief Description:** Air Compressor 90 Day Service

1. Perform normal tour checks and operations.
2. Change compressor crankcase oil.
3. Clean air intake filter.
4. Check air dryer, automatic condensate drains, and air tank for proper operation. Clean condensor coils and cover grills.
5. Inspect belt alignment and condition. Adjust or replace belts as required.
6. Check for corrosion and scale on water cooled units.
7. Clean heat exchange surfaces.
8. Check accuracy of gauges with calibrated test gauge.
9. On two stage compressor, check intermedite pressure.
10. Test relief valves, replace if leaking or the relief range is incorrect. Do not readjust safety relief valves in the field.
11. Check operation of compressor unloaders, repair or replace if not loading and unloading properly.
12. Check compressor suction and discharge valves for proper operation. Replace leaking valves.
13. Check cut in and cut out compressor pressure controller, readjust if necessary for proper air pressure requirements. Do not exceed ASME maximum tank pressure.
14. Check to make sure belt guard is installed prior to putting air compressor back in service.
15. No pressure vessel is to have its hand hole or man hole covers removed unless the vessel is at atmospheric pressure.

**Work Description:**



*NOTE: With eMaint X3, you have the ability to add or remove fields to the screen as well as change field names and attributes, screen layout, colors, etc. Your screen may look slightly different than the example above. This functionality is explained in detail in the System Administration training manual.*

The detail view contains all of the information of a work order. From this screen, you have total control of your work orders.

Options at the top left corner of the screen include:

**Add** – Opens a blank record for entering a new work order.

**Copy/Add** – Opens a new record in Add mode and populates the form with the previous record's values.

**Edit** – Opens the record in Edit mode for changing the work order's information.

**Delete** – Marks the record for deletion and removes it from the list view.

**List** – Returns to the list view.

**Previous** – Displays the detail of the previous record (ordered by ID).

**Next** – Displays the detail of the next record (ordered by ID).

**GoTo** – Opens a window that allows you to navigate directly to a record by entering the WO No.

**Close Out** – Opens the Close Out screen to mark the work order as completed.

**Print** – Opens the Print Work Order screen for selecting the print form.

**Purchase** – Opens a new Purchase Order form for ordering parts related to the work order.

### Adding Work Orders:

You can add new work orders from either the list or detail view. From the list view, the 'Add New Record' link is directly above the field headers and will open a new window in add mode. From the detail view, the 'Add' choice is the first in the main menu bar and will change the current window to add mode. The 'Copy/Add' option also changes the current window to add mode, except it will populate the form with the previous record's values for fast record entry.

The system will also create new work orders to reflect other features throughout the system. One example of this is automatically generated PMs.

Dashboard Work Orders Requests Assets Parts Contacts Reports Calendar

Detail View  
Work Orders

Options Learn More

Save New Record Cancel Changes

WO No.:

WO Date: Oct 24 2007

WO Type: CORRECTIVE

Sched. Date: --- -- 2007

Est. Hours: 0

Asset ID:

Asset Description:

Building:

Floor:

Request #:

Requested By:

Assign To Type: Other

Assign To:

Brief Description:

Work Description:

Status:

Completed Date: --- -- 2007

Downtime: 0

Problem Type: NONE

Work Order Status: Active

Project #:

Priority:

Req. Telephone:

Req. E-mail:

Perform For Type: Other

Perform For:

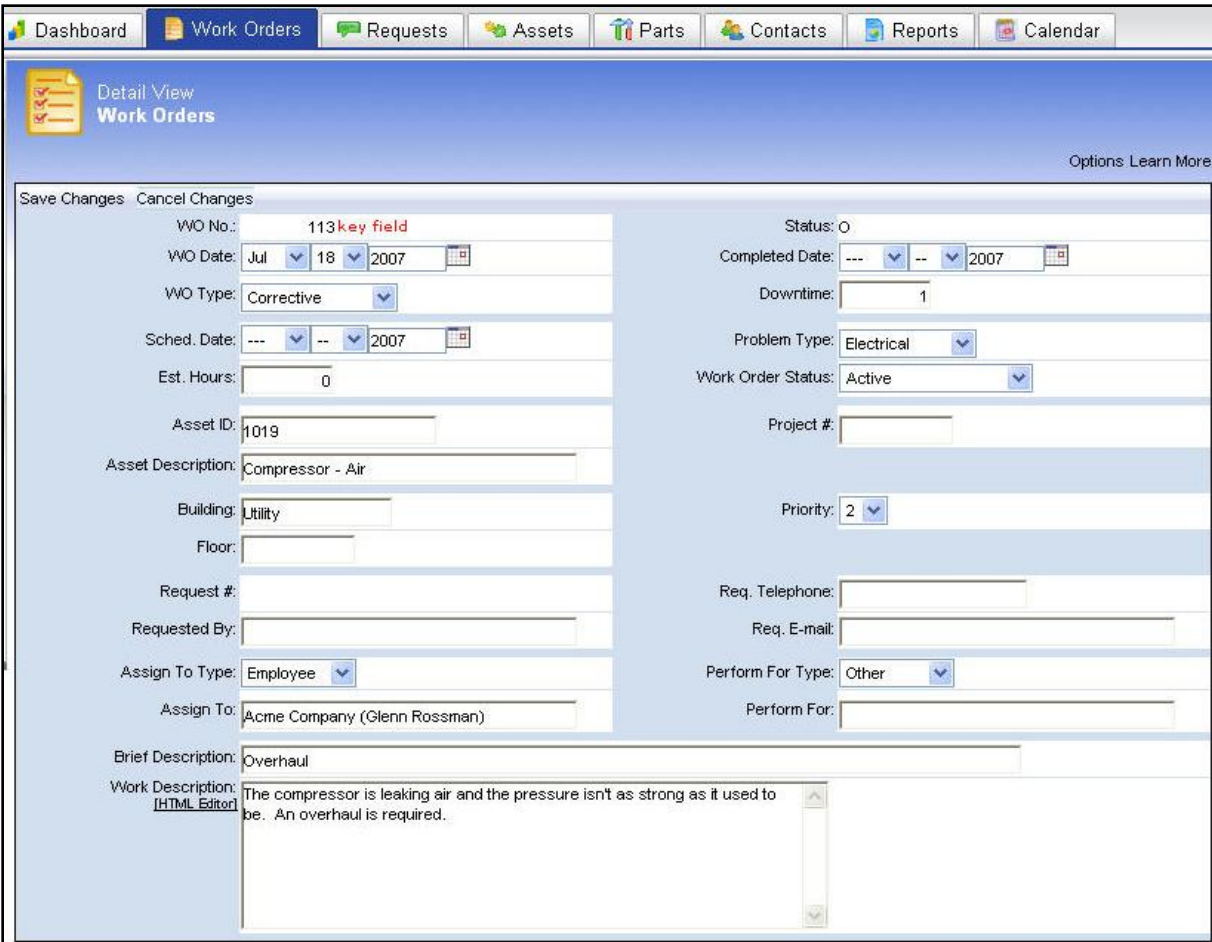
The main fields to populate are the Asset ID, Assign To, Brief Description and Detailed Description. It is always best to insert as much information about the work as possible to remove any “guess work” from your employees and contractors.

Be sure your maintenance contacts have valid email addresses or the various email features of the work order will not function.

### Editing Work Orders:

The form for editing work order information can also be accessed from either the list or detail views. From the list, click the pencil icon. From the detail view, click the ‘Edit’ link in the menu bar. Both links will open the edit form in the existing window.

Click ‘Save Changes’ to save the changes or ‘Cancel Changes’ to discard them. The form will return to the detail view of the work order.



Dashboard Work Orders Requests Assets Parts Contacts Reports Calendar




Detail View  
**Work Orders**
Options Learn More


Save Changes Cancel Changes

WO No.: 113 key field  
 WO Date: Jul 18 2007  
 WO Type: Corrective  
 Sched. Date: --- -- 2007  
 Est. Hours: 0  
 Asset ID: 1019  
 Asset Description: Compressor - Air  
 Building: Utility  
 Floor:  
 Request #:  
 Requested By:  
 Assign To Type: Employee  
 Assign To: Acme Company (Glenn Rossman)  
 Brief Description: Overhaul  
 Work Description: [HTML Editor] The compressor is leaking air and the pressure isn't as strong as it used to be. An overhaul is required.

Status: 0  
 Completed Date: --- -- 2007  
 Downtime: 1  
 Problem Type: Electrical  
 Work Order Status: Active  
 Project #:  
 Priority: 2  
 Req. Telephone:  
 Req. E-mail:  
 Perform For Type: Other  
 Perform For:

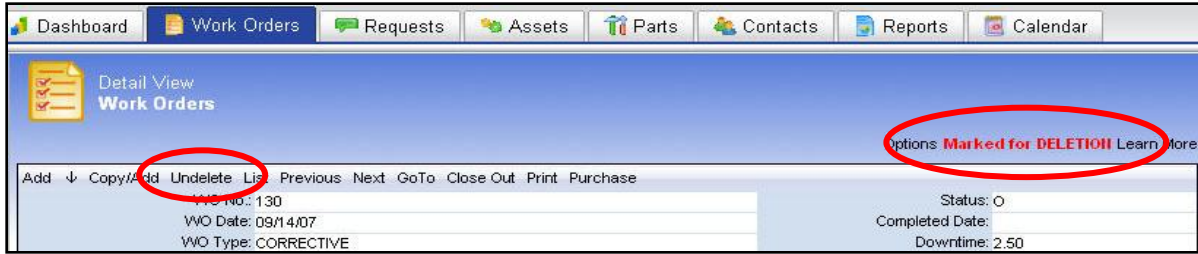
## Editing In Place

If "Edit In Place" is enabled, you can make changes to most fields without the need for entering edit mode. Enter the record's detail screen by clicking on the Magnifying Glass icon or the WO No. link on the list view. Place your mouse cursor over the field you wish to edit. If the field is able to be edited, the cursor will change to a pencil . Double-click your left mouse button and the field will open in edit mode. Make your changes then click the save  icon to save your changes or click the cancel icon  to return without saving.

If a field cannot be edited with Edit In Place, the cursor will change to a "no" symbol . These fields require you to enter 'Edit' mode to make any adjustments.

## Deleting Work Orders

Deleting records is a two step process. The first step is to mark the record for deletion by clicking the 'Delete' link. This removes the record from the list view but still allows you to locate it by using the 'GoTo' link (if you know the record ID) or using the 'Next' and 'Previous' links to page through the records. At this point, you can still un-delete the record by clicking the 'Un-delete' link.

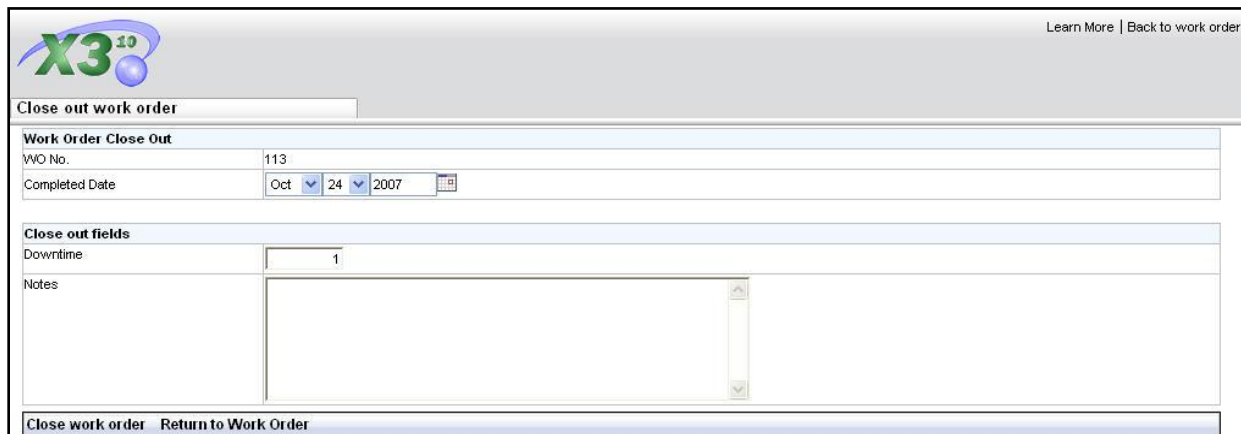


The second step of the deletion process is to completely remove records from system. Go to the Removed Deleted Records link located in the Administration menu. This list displays the various tables that can hold record marked for deletion. Click the magnifying glass icon to preview items that will be deleted. Click the trash can icon to remove all the records for that section. For more information on deleting items, see the System Administration manual.

*NOTE: The Remove Deleted Items option permanently removes records. There is no way to bring them back. Use this feature at your own risk.*

### Close Out

When a work order has been completed, use the 'Close Out' link to close it in the system.



The standard close out screen has two sections: Work Order Close Out and Close out fields.

#### Work Order Close Out

This section allows you to change the close out date which will be recorded by the system. By default, the WO Completion Date is automatically filled in with today's date.

#### Close Out Fields

The fields in this section are determined by the system administrator. Any fields which will provide more information about the closing of the work for this job can be added. (System Administration training explains how to select the fields for this close out screen.)

Once you click the 'Close work order' link, the work order is now closed. The Status field is changed from an O (open) to an H (history/closed). Non-PM work orders can be reopened by clicking the 'Close Out' link again and then selecting the reopen link at the bottom of the screen. Reopening the work order will also enable editing of the close out information.

The close out information that was entered can also be viewed (without running a report) by clicking the 'Close Out' link from the work order detail.

Print

See the next section, Printing Work Orders, for details on printing you work orders.

Purchase

The 'Purchase' link opens a new window with a blank purchase order form. This allows you to place orders for parts that are required for the work order.

Reset Form | Close Window | Return to Main Menu

**Purchase Order**

Purchase Order		Terms, Etc.	Comments	Invoices		
PO No.	PO Date	Location	WVO No.			
NEW	Oct 24 2007	MAIN	113			
Supplier Information		Ship to				
Click folder for Vendor List		Jeff Werth 100 Main Street Washington, DC USA 12345				
Line I	Qty Order	Item	Description	Cost	Unit Me	Ext. Cost
		Suppl. Part No.	Required Date	Location	Account No.	
						Total : \$ 0.00

**Actions**

Proceed Reset

This form is identical to the purchase order form from the Create Purchase Order menu option. Parts on order will be listed on the 'Purchase' table of the work order detail. When the PO is received, the part will be added to the 'Charges' table.

*NOTE: The purchase order system is beyond the scope of the manual. See the Inventory Control manual for more information.*

Work Order Charges

The Work Order Charges table lists the various charges made against the work order. Possible charge types are Labor, Parts, Misc and Quick Parts.

Work Order Charges									
Tranid	Category	Wo Contactid	Tranidate	Qty	Unitcost	Extcost	Comment	Code1	Acct_no
<b>Employee</b>									
GoTo	_26E0TN2I2	Employee	113.00 1004	09/10/2007	1.00	28.75	28.75 Found frayed wire. Replace and also replaced O-Ring		
Sub					1.00	28.75			
<b>Parts</b>									
GoTo	_26E0TLRNU	Parts	113.00 2011	09/10/2007	1.00	3.30	3.30		Part
Sub					1.00	3.30			
Total					2.00	32.05			

To add a charge, use the drop-down list to select the charge type and click the 'Add Charges' button. The window will load the appropriate screen for entering the charge. For more information about adding charges, see the Work Order Management Level 1 manual.

### Work Procedures

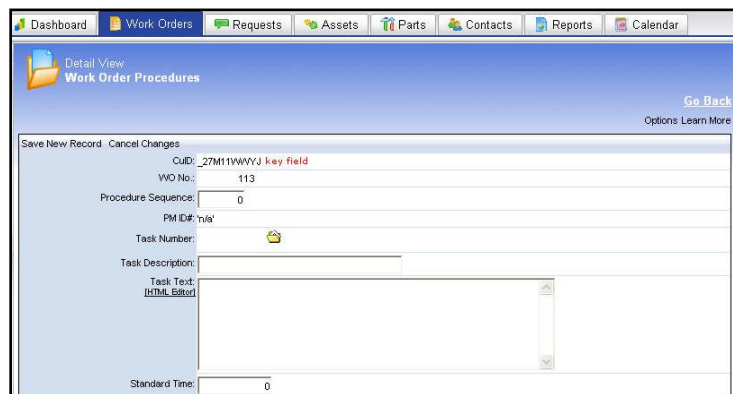
Similar to the PM schedules' 'Procedures' table, the Work Procedures table allows you to link a PM Task to the work order. This table will also list the PM Procedures from a generated PM.

Work Procedures					Add   Options   [-]
WO No.	Procedure Sequence	Task Description	Task Text	Standard Time	
<a href="#">Go To</a> 113	0.00	Air Compressor 90 Day Service	1. Perform normal tour checks and operations. 2. Change compressor crankcase oil. 3. Clean air intake filter. 4. Check air dryer, automatic condensate drains, and air tank for proper operation. Clean condenser coils and cover grills. 5. Inspect belt alignment and condition. Adjust or replace belts as required. 6. Check for corrosion and scale on water cooled units. 7. Clean heat exchange surfaces. 8. Check accuracy of guages with calibrated test guage. 9. On two stage compressor, check intermedite pressure. 10. Test relief valves, replace if leaking or the relief range is incorrect. Do not readjust safety relief valves in the field. 11. Check operation of compressor unloaders, repair or replace if not loading and unloading properly. 12. Check compressor suction and discharge valves for proper operation. Replace leaking valves. 13. Check cut in and cut out compressor pressure controller, readjust if necessary for proper air pressure requirements. Do not exceed ASME maximum tank pressure. 14. Check to make sure belt guard is installed prior to putting air compressor back in service. 15. No pressure vessel is to have its hand hole or man hole covers removed unless the vessel is at atmospheric pressure.	0.75	

To add a Work Procedure, click the 'Add' link on the right side of the Work Procedure table,

The fields to enter are:

- If there is more than one procedure, enter this procedure's number sequence here.
- Use the file lookup on 'Task Description' to open the PM Task list. Choose a task by clicking the 'Select' link on the left of the task. 'Task Description' and 'Task Details' will automatically populate with the PM Tasks information.
- You can link to a local file, web address or email by entering the value in 'Web Link'. The 'File' button will open the window to help you choose a file on your machine or local network.
- Enter the time the procedure should take in the 'Standard Time' field.



Click 'Save New Record' to save the procedure to the work order, or click 'Cancel Changes' or 'Go Back' to return to the Work Order without saving.

### Assignments

The Assignments table works in conjunction with the Timecard/Planner module. The Planner allows you to quickly and easily assign contacts to work orders by listing both on the same page. Once assigned, the Timecard is used to

charge time against the work order by either using the Sign On/SignOff button for active time tracking or directly adding the time. The Timecard also allows a work order to be closed when the work is complete.

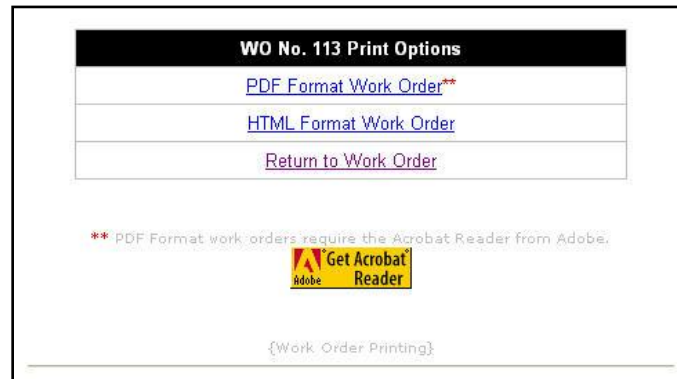
*NOTE: The Timecard and Planner feature is available upon request and will need to be turned on by an eMaint Support Specialist if you feel this feature would help your business process.*

## Printing Work Orders

In eMaint you can either print a single work order from the detail screen of the work order or print a filtered group of work orders by selecting that option from the Work Center.

### Printing a single work order

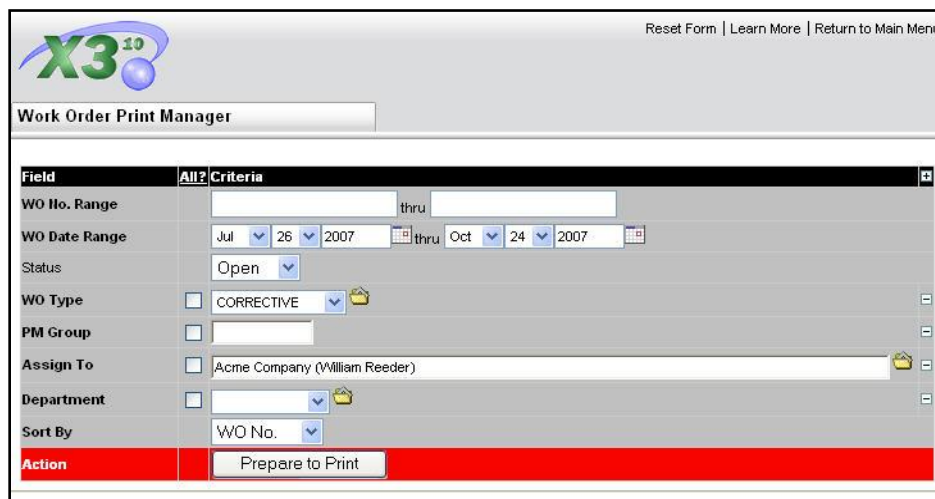
To print a work order from the detail view, click the 'Print' link on the menu bar at the top of the work order. The next screen contains options to view the printable work order in PDF or HTML format or return to the detail view of the work order.



Clicking the PDF format option will load the work order in Adobe Reader. Clicking the HTML format option will load the work order in a new browser window. Both options have a printer icon. Clicking it will enable you to print the work order to your printer.

### Printing a Filtered Group of Work Orders

The Work Order Print Manager option on the Main Menu is useful if you need to print a group of work orders based on various criteria.



After selecting this option from the main menu, enter information in those fields on which you would like to apply a filter. For those fields which do not need a filter, put a check mark in the box located in the 'All' column. Use the '+' button at the top right of screen to add criteria to this screen. At this point the system will allow you to print those work orders you selected based on the sort order you chose.



## Work Order Requests

If you have purchased a Work Requestor Pack or you use an approval process for entering work orders, the Request tab will allow you to review a work order and either approve or deny it as necessary.

You can add a work order request to the system from either the 'My Requests' page or from the 'Request Manager' page located in the Request Center ('Requestor Only' users cannot access the Request Manager).

### Request Manager

The Request Manager's list and detail views are similar to the Work Order's list and detail views. Each work order request displayed in the list has its Request No. underlined. This means you can click the request number to see the record in detail. To the left of each row are a magnifying glass icon and a pencil icon. You can click the magnifying glass icon to see the detail record of the request. You can click the pencil icon to edit the request record.

From this screen you can add a new work order request to the list by clicking 'Add New Record' in the upper right corner. If any changes were made to a request while this window was open, click 'Refresh' to reload the page. The 'Learn More' link provides a brief description of the list view and how to navigate around it. To close the window and return to the main menu, click the 'Close Window' link in the upper right corner.

Click the 'Form Options' link at the bottom of the list to change the default settings of how this screen is displayed. This feature is described in more detail in the System Administration training manual.

### Searching your Work Order Requests

You can expand your search further by applying sorts and/or filters.

#### **Sorting the list**

Click on one of the column headings and the list will sort in ascending order. Once sorted, a small arrow icon (pointing up) will appear to the right of the column name. This indicates that the list is sorted in ascending order. Click the arrow icon and the list will sort again, this time in descending order.

#### **Applying Filters to the List**

Filters are used to search the whole list and display the matching results. For example, if you wanted to see only those requests whose 'Status' begins with the letter 'A', you would type the letter 'A' in the filter for the 'Status' column and then click the red 'Set' link to the left of the filter row. Besides displaying the results, the number of records that matched the filter expression will display in the upper left of the screen. You can apply single or multiple filters at one time if needed.

To remove the filters, click the red "Clear" link. The full list will display.

**TIP:** The system remembers the filters and sorts that you apply and will display it the next time you navigate to that list.

See [Adding a New Work Request](#) to add a new request.

## My Requests

Selecting this option will display the user's personal request page (displayed below).

Work Request Module
[Add New Request](#) [Close Window](#)

Monday, 08/27/2007
eMaint Enterprises LLC :Vincent Cammarota

**Open Work Requests**

Request Number	Request Date	Problem Type	Asset Description	Sched. Date	Assign To	Brief Description
00024	07/05/2007	HARDWARE	Leah's Computer			dfsgsg...
00025	07/05/2007	HARDWARE	Video Liquidators Clerk PC			gfdhf...

**Rejected Work Requests (Last 30 Days)**

Request Number	Request Date	Problem Type	Asset Description	Brief Description	Approval Memo

**Work Request History**

Aug 23 2007 thru Aug 26 2007 Filter

Status	WO No.	WO Date	Problem Type	Asset Description	Sched. Date	Assign To	Brief Description
✖	<a href="#">142</a>	08/23/2007		Vince's Computer		(Vincent Cammarota) ✉	Virus Scan...
✖	<a href="#">141</a>	08/23/2007		Vince's Computer		(Vincent Cammarota) ✉	Virus Scan...
✖	<a href="#">140</a>	08/23/2007		Vince's Computer		(Vincent Cammarota) ✉	Virus Scan...
✖	<a href="#">139</a>	08/23/2007		Vince's Computer		(Vincent Cammarota) ✉	Virus Scan...

**Status Legend**  
✖ = W.O. Closed  
● = Open W.O.

This page displays the Requests made by the user. The first section, Open Work Requests, lists the requests that are still pending review. The second section lists the requests that were rejected. The third section lists the work orders that were approved and their status within the date range specified at the top of the section. A 'Status Legend' is located at the bottom of the page that describes the status symbols and their meaning.

To add a new work order request, click the 'Add New Request' link at the top of the page.

## Adding a New Work Request

Click 'Add New Record' on the 'Request Manager' screen or click 'Add New Request' on the 'My Requests' screen to open the work request form in add mode.

Detail View  
Work Order Requests

Options: Learn More

Save New Record Cancel Changes

Request Number: 00033 key field

Status: O

Request Date: 10/24/2007

Request Time: 06:05:11 PM

Asset ID:

Asset Description:

Requested By: ACME01

Telephone:

Ext.:

E-mail:

Probtype: NONE

Brief Description:

Work Description:   
[HTML Editor](#)

Approval Memo:

This is a simplified work order form that contains only the necessary fields a requestor would need. It is recommended to fill in all of the fields on the form to best describe the work that you are requesting.

Once a request has been entered in the system, it is approved or rejected from the detail view of the Request Manager section. Only approved requests are entered into the Work Order Center.

*NOTE: With eMaint X3, you have the ability to add or remove fields to the screen as well as change field names and attributes, screen layout, colors, etc. Your screen may look slightly different than the example above. This functionality is explained in detail in the System Administration training manual.*

### **Editing Requests:**

The form for editing request information can be accessed from either the list or detail views of the Request Manager. Requestor Only users will not have access to this function. From the list, click the pencil icon. From the detail view, click the 'Edit' link in the menu bar. Both links will open the edit form in the existing window.

Click 'Save Changes' to save the changes or 'Cancel Changes' to discard them. The form will return to the detail view of the request.

*NOTE: Once a request is approved or rejected, editing the request will not update the work order, nor will it 'un-reject' the request.*

## **Editing In Place**

If "Edit In Place" is enabled, you can make changes to most fields without the need for entering edit mode. Enter the record's detail screen by clicking on the Magnifying Glass icon or the Request No. link on the list view. Place your mouse cursor over the field you wish to edit. If the field is able to be edited, the cursor will change to a pencil . Double-click your left mouse button and the field will open in edit mode. Make your changes then click the save icon to save your changes or click the cancel icon to return without saving.

If a field cannot be edited with Edit In Place, the cursor will change to a "no" symbol . If editable, these fields require you to enter 'Edit' mode to make any adjustments.

*NOTE: Once a request is approved or rejected, using Edit In Place will not update the work order, nor will it 'un-reject' the request.*

## **Deleting Requests**

Deleting records is a two step process. The first step is to mark the record for deletion by clicking the 'Delete' link. This removes the record from the list view but still allows you to locate it by using the 'GoTo' link (if you know the record ID) or using the 'Next' and 'Previous' links to page through the records. At this point, you can still un-delete the record by clicking the 'Un-delete' link.



The second step of the deletion process is to completely remove records from system. Go to the Remove Deleted Records link located in the Administration menu. This list displays the various tables that can hold records marked for deletion. Click the magnifying glass icon to preview items that will be deleted. Click the trash can icon to remove all the records for that section. For more information on deleting items, see the System Administration manual.

*NOTE: The Remove Deleted Items option permanently removes records. There is no way to bring them back. Use this feature at your own risk.*

## **Approving and Denying Requests**

A user with the system permissions 'Approve Requests' and 'Reject Requests' can enter the Request Manager to approve or reject work order requests. When a request is approved, the work order form will open in Edit mode so it can be completed before being placed in the Work Order Center. An email will be sent to the requestor informing him/her of the approval and the request will move from the 'Open Work Requests' section to the 'Work Request History' section on the My Request page.

When a work request is rejected, an email will be sent to the requestor to inform him/her of the rejection. The work request will be placed in the 'Rejected Work Requests (Last 30 Days)' section of the Requestor's 'My Requests' page.

## Lookups for Problem Types, Work Order Types, and Departments

There are three fields with pre-established lookup options that are accessible from the Data Center. The three fields are Department (on the Asset record and Work Order record), and WO Type and Problem Type (both on the Work Order record).

When you have a Lookup on a field, it means you have a set of predefined values specific to that field. You also have control of the lookup so you can add, edit and remove information as needed. This ensures that you have uniform data entry for these fields which results in increased accuracy in reporting. A lookup is also a time saver when entering new records because you can pick a value from the lookup on the field rather than typing it in each time.

To set up the Lookup values for the Problem Type, Department, or WO Types in eMaint, click on one of these options from the Data Center.

Work Type List	
Manage Works Type	Add a work type
BLANKET	
CALIBRATE	
CONSTRUCTION	
CORRECTIVE	
EMERGENCY	
HOUSEKEEPING	
MINOR	
PM	
PREDICTIVE	
PREVENTIVE	
PROJECT	
REACTIVE	
REQUEST	
SAFETY	

From the Lookup window, you can add new items to the lookup by clicking the 'Add...' link at the top. You can edit items by clicking the pencil icon and delete items by clicking the trash can icon.

When you click the Add option in the upper right portion of the window, the Add window opens.

Enter the value, and then click 'Save.' It will now be available on the Lookup folder associated with this field when you add or edit a work order in the system.

In addition to managing the Lookups from the main menu, you can also manage them directly from the add or edit mode on an Asset record or Work Order Record. Simply click the yellow file folder icon to the right of the field to access the Lookup screen. This screen is identical to the screen on the Main Menu, and it allows you to add, edit or delete the values associated with the Lookup.

*NOTE: The System Administrator functions within eMaint enable you to add Lookups to virtually any field in the system. A detailed explanation of this procedure is offered in the System Administration manual.*