
eMaint X3 System Administration

This course provides a detailed review of the tools available to fine tune your eMaint X3 system, from the management of users to the forms themselves.

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Introduction

System Administration is the process of setting up and maintaining the system for the benefit of the users.

Most of the system settings can be found in various places for your convenience, however the Administration section of the **Navigation** tab contains all of the system-wide settings. From there you may enter different screens to manipulate setup options, user permissions, screen displays, exporting data, and removing deleted records. These features not only enable you to modify how the system is used but also its look and feel.

This document is organized to first explain the major administrative features then delve deeper into the administrative features located on the forms within the system.

| Administration | |
|------------------------|--|
| Change Your Settings | |
| User Administration | |
| Add New Users | |
| Login as another User | |
| Export Data | |
| Manage Data Dictionary | |
| Manage Forms | |
| Remove Deleted Records | |
| Customize my own page | |
| Manage Reports Options | |
| Site Activity Report | |
| Tab Manager | |
| Workflow Manager | |

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.

One of the new features of version 10 is “persistent tabs”. Persistent tabs remember the record being displayed and will display it when you return to that tab. For example, 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 the part, work order number 256 will be loaded automatically.

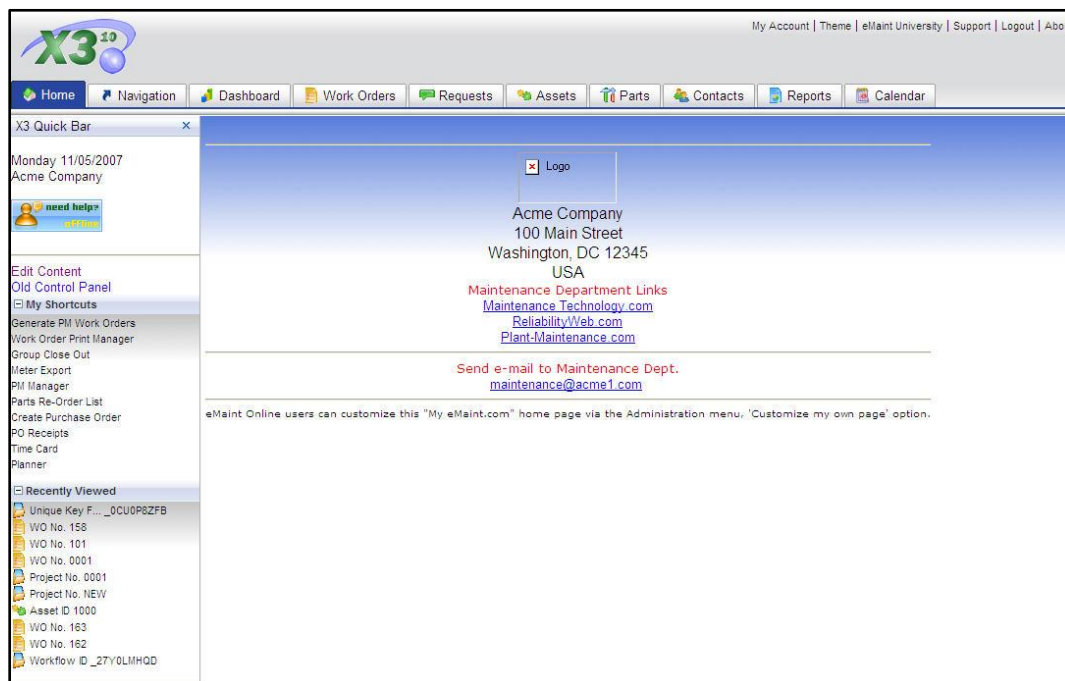
The Title Bar

The title bar 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 or the **Customize My Own Page** link in the Administration section of the **Navigation** Tab.



The Navigation Tab

The Navigation tab contains all the areas of the system as they were laid out in previous X3 versions. 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 – Allows you to manage your work orders, PMs and personal reminders by placing them on an easy-to-use calendar.
- Simple Work Order – Opens a simplified work order form for quick entry.

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 turn scheduled PM's into open work orders in the system.
- 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.
- Project Master File – Views projects that help manage goal-oriented work orders.
- 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 select to export all 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 – Used for customizing your 'My eMaint' page. 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.
- Workflow Manager – A configurable set of rules that tells the system how to react to specific situations.

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.

Note: Added modules and custom interfaces may add or change options to this list.

Administration

The Administration section of the **Navigation** tab is where most of the system features can be found. What follows is a discussion of each section individually.

| Administration | |
|------------------------|---|
| Change Your Settings |  |
| User Administration |  |
| Add New Users |  |
| Login as another User |  |
| Export Data |  |
| Manage Data Dictionary |  |
| Remove Deleted Records |  |
| Customize my own page |  |
| Manage Reports Options |  |
| Site Activity Report |  |
| Workflow Manager |  |
| Tab Manager |  |

Change Your Settings / My Account


This is the area where the user's information and global system settings are held. You can also access this area with the **My Account** link located at the top right of most pages.

This screen contains two sections. The top portion shows the information for the user and the bottom portion shows global system settings. When making changes in any section, be sure to save the settings before leaving the page.

NOTE: This menu option is securable via the 'User Administration' feature. If enabled, a user will be able to change his password and contact information only. Regular users will not be able to change any of the Administrator settings.

Account Settings

This section allows changes to the user's contact information. Password, address information, phone numbers, and email address for the logged-in user are maintained in this area. Any changes to the information will be saved once the **Save Settings** link is clicked. Click **Return to Main Menu** in the right-hand corner to cancel any changes.


Learn More | Return to Main Menu

Account Settings

| Account Name and Password | |
|-------------------------------|---|
| Name | <input type="text" value="ACME01"/> |
| Password | Change Password |
| Password duration (days) | <input type="text" value="0"/> |
| Contact Information | |
| Full Name | <input type="text" value="Jeff Werth"/> |
| Company | <input type="text" value="Acme Company"/> |
| Address (1) | <input type="text" value="100 Main Street"/> |
| Address (2) | <input type="text"/> |
| City | <input type="text" value="Washington"/> |
| State | <input type="text" value="DC"/> |
| Zip | <input type="text" value="12345"/> |
| Country | <input type="text" value="USA"/> |
| Phone # | <input type="text" value="555-555-1212"/> |
| Fax # | <input type="text"/> |
| Email Address | <input type="text" value="vincent.cammarota@emaint.com"/> |
| Save Settings | |
| Administrator System Settings | |

Administrator System Settings

This section is located in the lower portion of the Account Setting screen and can only be edited by the administrator. A regular user with access to the Account Settings page will be able to see these links on the page but will be unable to click into them.

| 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

Sets the general system properties for your account.

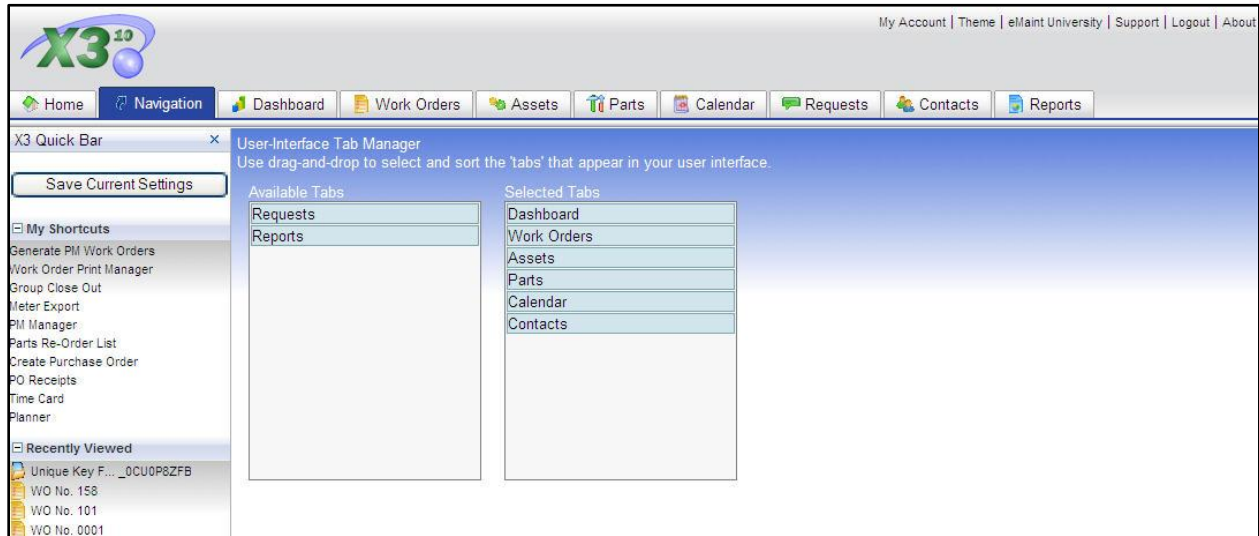
| General System Settings | |
|--|--|
| Date Display Properties | 01/25/2006 |
| Symbol used for Currency Values | \$ |
| Use old-style lookups <small>Tip: Turn on this option if you have Active X/browser security issues with the LIST lookups</small> | <input type="radio"/> On <input checked="" type="radio"/> Off |
| Default password duration (days) <input type="checkbox"/> This value will not be saved for users which the password duration was overridden. Check this box to force this value to all users. | 0 |
| Allow Direct Labor Charges to Assets | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Enabled Edit In Place | <input checked="" type="radio"/> On <input type="radio"/> Off |
| Activate V10 | <input checked="" type="radio"/> On <input type="radio"/> Off |

- **Date Display Properties** is where you choose the format of the dates in your system.
- The **Symbol used for Currency Values** will affect all of the areas where currency is displayed.
- In general, there is no need to change the option for **Use old-style lookups**. For rare lookup problems, eMaint may advise you to turn this on.
- **Default password duration (days)** is a security feature that allows the administrator to set a number of days after which the user password expires. The checkbox will override the password duration set in the individual users' password expiration (see page 7). Leaving the field set to zero means that the system will not force all users to change the password.

- **Allow Direct Labor Charges to Assets** allows you skip the work order creation process to assign work to an asset. The system will create a blanket work order with a status of “K” for each asset, per year. Each time you use the Labor Charge link on the asset detail form, the system automatically updates the work order for you.
- **Enable Edit In Place** allows you to make changes to fields without entering edit mode. When on a detail form, double-click the field you want to change, make your changes and click the check mark icon to save. Some fields are not available for Edit In Place.

User Interface Settings

The “User Interface Tab Manager” allows you to add, remove and rearrange the tabs. A user can customize his/her tabs without affecting other users.



The first box, “Available Tabs”, is the list of tabs available for placement. The second box, “Selected Tabs”, is a list of tabs that are currently being displayed. Move a selection by clicking on it and dragging it to the opposite box. You can also rearrange the order of the tabs by clicking on a selection and moving it to the desired location.

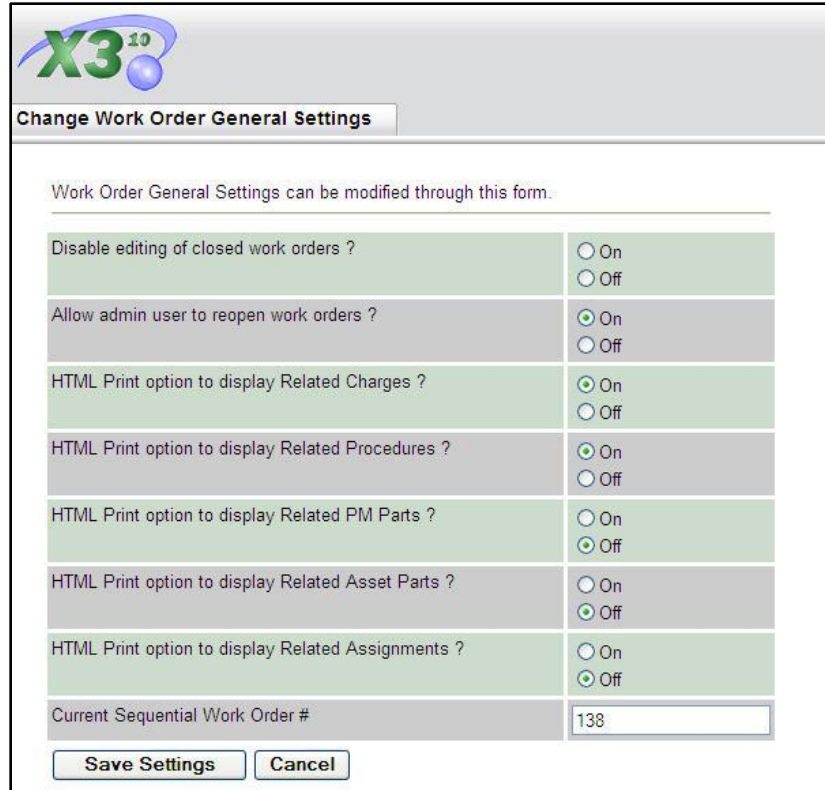
Note: The Home and Navigation tabs cannot be moved or removed.

When you are finished making changes, click the **Save Settings** button which is located on the Quick Bar.

General Work Order Settings

This section handles closed work order settings, print options and number sequence.

- “Disable editing of closed work orders?” – Allows or prohibits the editing of closed work orders. This also prohibits anyone from adding charges to a closed work order. If you set this option to “Off”, you can still remove editing permissions, open or closed, from each user in the **User Administration** section.
- “ Allow admin user to reopen work orders?” – Prohibits the administrator from reopening closed work orders.
- HTML Print options – When set to “On”, these options will print the appropriate related tables underneath the work order form when the table contains data. These options do not affect the PDF form.
- Current Sequential Work Order # – This number sets the next work order number and then increases in increments of one.



X3¹⁰

Change Work Order General Settings

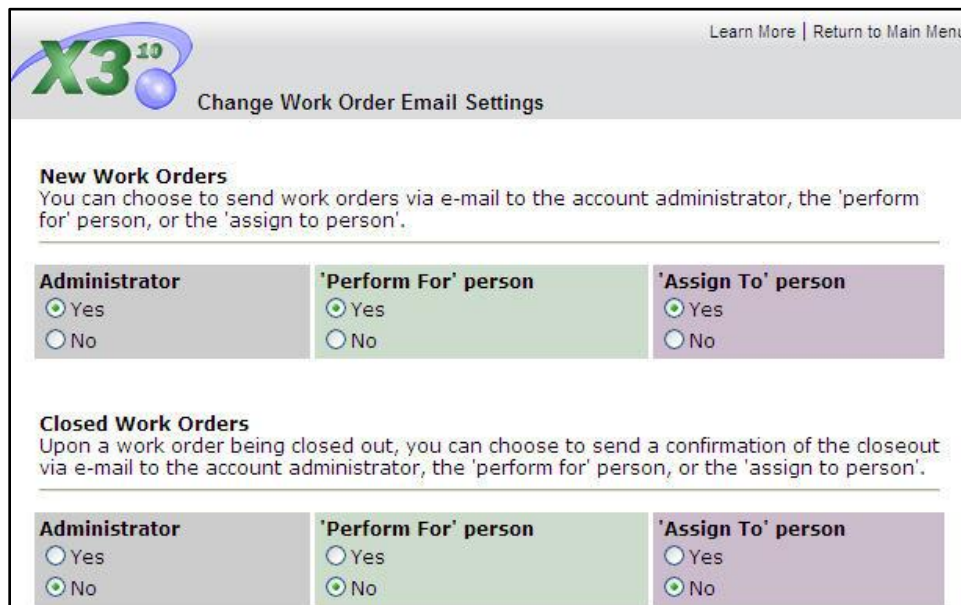
Work Order General Settings can be modified through this form.

| | |
|--|--|
| Disable editing of closed work orders ? | <input type="radio"/> On <input type="radio"/> Off |
| Allow admin user to reopen work orders ? | <input checked="" type="radio"/> On <input type="radio"/> Off |
| HTML Print option to display Related Charges ? | <input checked="" type="radio"/> On <input type="radio"/> Off |
| HTML Print option to display Related Procedures ? | <input checked="" type="radio"/> On <input type="radio"/> Off |
| HTML Print option to display Related PM Parts ? | <input type="radio"/> On <input checked="" type="radio"/> Off |
| HTML Print option to display Related Asset Parts ? | <input type="radio"/> On <input checked="" type="radio"/> Off |
| HTML Print option to display Related Assignments ? | <input type="radio"/> On <input checked="" type="radio"/> Off |
| Current Sequential Work Order # | <input type="text" value="138"/> |

To save changes, click the **Save Settings** button at the bottom of the page. To cancel the changes, click the **Cancel** button.

Work Order Email Settings

This section configures the email settings during the work order process. Make your selection for each setting by clicking on the radio buttons.



X3¹⁰ [Learn More](#) | [Return to Main Menu](#)

Change Work Order Email Settings

New Work Orders
You can choose to send work orders via e-mail to the account administrator, the 'perform for' person, or the 'assign to person'.

| | | |
|--|---|---|
| Administrator <input checked="" type="radio"/> Yes <input type="radio"/> No | 'Perform For' person <input checked="" type="radio"/> Yes <input type="radio"/> No | 'Assign To' person <input checked="" type="radio"/> Yes <input type="radio"/> No |
|--|---|---|

Closed Work Orders
Upon a work order being closed out, you can choose to send a confirmation of the closeout via e-mail to the account administrator, the 'perform for' person, or the 'assign to person'.

| | | |
|--|---|---|
| Administrator <input type="radio"/> Yes <input checked="" type="radio"/> No | 'Perform For' person <input type="radio"/> Yes <input checked="" type="radio"/> No | 'Assign To' person <input type="radio"/> Yes <input checked="" type="radio"/> No |
|--|---|---|

New Work Orders – When set to Yes, the system sends an email to notify the person of a new work order.

Closed Work Orders – When set to Yes, the system sends an email to notify the person of a closed work order.

Work Order Request Notifications
When 'Send Email to Notification Group' is activated, an email notification will be sent to any Maintenance Contact record which has the field 'Request Notification Group' set to 'True'. When 'Enable Take Ownership' is activated, recipients of these emails will be able to accept the request and assign the work to themselves using a link provided in the email.

| | |
|---|---|
| Send Email to Notification Group <input checked="" type="radio"/> On <input type="radio"/> Off | Enable 'Take Ownership' Link <input checked="" type="radio"/> On <input type="radio"/> Off |
|---|---|

Work Order Request Notifications – This section is split into two settings and works in conjunction with the 'Request Notification Group' field on the Contacts form.

- "Send Email To Notification Group" – When this setting is set to "On" an email is sent to each contact with 'Request Notification Group' field set to "True". This email informs the contact of each new work request.
- "Enable "Take Ownership" Link" – This option depends on the "Send Email To Notification Group" setting which must be turned on to work. When set to "On" the email described above will contain a link for the contact to "take ownership" of the work order. When clicked, the work order will be assigned to that contact. Then another email will be sent containing a link that will close the work order.

Email Subject
Choose the format for the subject line of the Work Order Emails that are sent. Note: *work order brief description* will utilize the Brief Description of the Work Order as the email subject and *Other* options will allow you to set your own custom subject.

Work Order # 9999999
 Acme Company Work Order # 9999999
 work order brief description
 Other:
 Other: 9999999


Email Subject – Allows you to select the subject line of the emailed work orders in your system.

Click on the **Save Settings** to save your changes to this section. Click the **Return to Main Menu** link or **Cancel** to cancel any changes before saving.

Note: The 'Perform For' and 'Assign To' sections refer to the fields on the work order form. These fields must have a contact with a valid email address or the system will not send an email.

PM Settings

This section sets the global PM settings and PM email notifications.


Learn More | Return to Main Menu

Change PM Settings

You can automatically generate and email your P.M. work orders on a daily basis. PM work orders will be sorted by the 'Assign To' person and emailed directly to that person. A copy of all PM work orders will be sent to the account administrator with a breakdown of how many work orders were sent to the individual 'Assign To' people. You can also suppress the receipt of emails on days when you have no PM's generated. Select the time of day and time zone for when your PM's will be generated.

| | | |
|---|-------------------|---|
| <input checked="" type="checkbox"/> Disable Daily PM Generation & Email <input type="checkbox"/> Send email when no PM's are generated | File Type: PDF | Produce PM's automatically every day at: 1 AM Eastern Standard Time (North America) |
| <input checked="" type="checkbox"/> Send PM Summary and work orders to Administrator | | |
| <input checked="" type="checkbox"/> Send PM work orders to the Perform For | | |
| <input checked="" type="checkbox"/> Send PM Work orders to the Assign to | | |
| <input type="checkbox"/> Send PM Summary and work orders to Other Address | | Other Email Address <input type="text"/> |
| <input type="checkbox"/> Send PM Summary and work orders to PM Field | | PM Field Name <input type="text"/> |
| <input type="checkbox"/> Automatically generate PM on exceeded meter reading | | |

The top row on this page allows you to set general PM settings.

- Place a check in the box next to “Disable Daily PM Generation & Email” if you would like to disable the automatic PM generation.
- Place a check in the box next to “Send email when no PM's are Generated” to send an email to the admin when there are no PMs generated that day.
- In the 'File Type' box you can set the print format to PDF or HTML. If set to HTML, a **Configure** link will appear which will allow you to customize the header and footer of the print form.
- You can set the PM generation time in the 'Produce PM's automatically every day at' section. Use the drop-down boxes to select the time, AM or PM, and the time zone.

The next four rows allow you to send generated PMs to the Administrator, the contacts designated in the 'Assign To' and 'Perform For' fields and any email address(es) in the 'Other Email Address' box

The 'Send PM Summary and work orders to PM Field' section allows you to use a custom field on the PM form to send PMs to. Enter the field's description in the box provided. Be sure the email addresses on the PM form are valid.

The last setting, if checked, will automatically generate a meter-based PM when the meter exceeds the value in the 'Produce PM Every' field on the PM form.

Click on the **Save Settings** button to save your changes. If you do not want to save any changes, click the **Cancel** button or the **Return to Main Menu** link.

Inventory Control Settings

These settings contain an option to charge parts directly to an asset instead of creating a work order to charge out parts. When selected, this option will create a new link on the assets called **Parts Charge**.

These settings are also used to configure and manage multiple locations in a Multiple Locations environment. (If you have this environment, refer to the manual for a detailed discussion of how to use this option.)

Purchasing and Requisition Settings

This section allows for control of the requisitioning process for those eMaint clients who have the Requisition module. These settings do not affect the purchasing process for clients who do not use requisitioning. (See the Requisitioning Manual for a complete discussion of the settings in this section.)

Add New Users

Under the Administration section, the **Add New User** link will begin the process of adding a new login user name to the system.

- Enter the user’s name into the fields provided. The remaining fields aren’t necessary to create the new user, but if entered it will be available on that user’s “Account Settings” screen for your reference.
- If you are setting up a work requestor, click the arrow on the drop-down and select “Work Request Only.”
- When you click the **Add New User** button, a screen will confirm the addition of the new user and provide you with the new login name and password.

The user will be added to the account and your company will be invoiced accordingly (if applicable). To configure the security settings and properties for the new user see the next topic, ‘User Administration.’



Add New User

You are about to add a new user.
Please Note: Applicable licensing fees may apply.
(*indicates required entries)

Add New User

Account: Acme Company

Name: *

Email:

Phone:

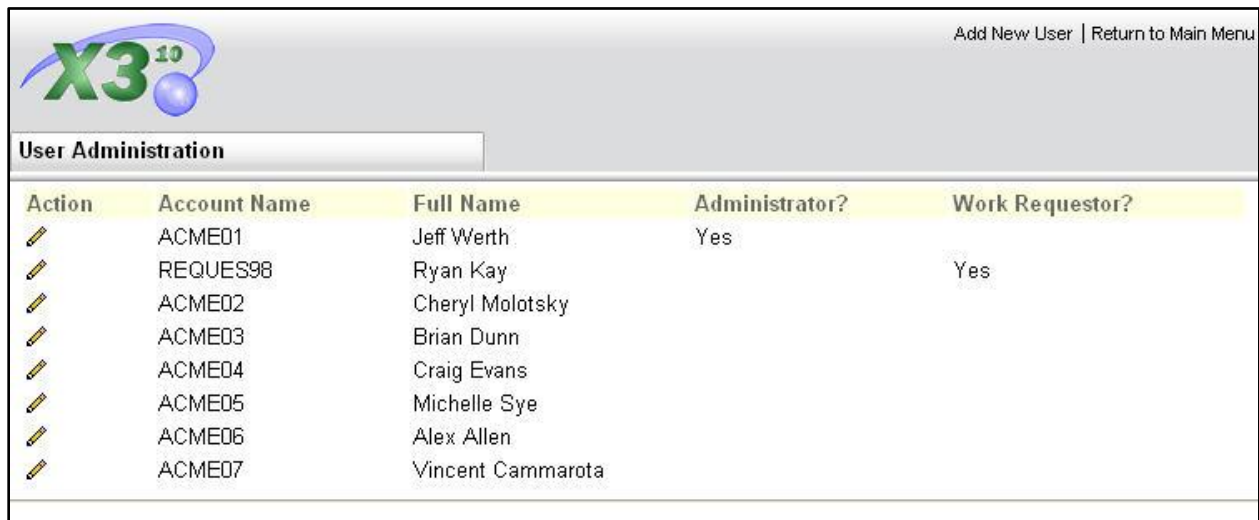
Fax:

User Type: Standard User

Add New User

User Administration

Each eMaint X3 user has his/her own set of privileges within the system. These privileges plus other properties are configured here. (See “Add New Users” above for details on creating new users in the system.)



| 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 | | |

Clicking the **User Administration** menu option displays a list of all users who currently exist. Click on the pencil icon next to the user account you wish to configure. A list of all the security settings will now display along with the user name, user login, and **Change Password** link for the user account being accessed.

User Profile Information

| User Profile | |
|---|---|
| User Account | Jeff Werth |
| Account ID | ACME03 |
| Password | Change Password |
| Password duration (days) | 0 |
| Work Requests Only? | NO |
| Copy rights to | Select from list below <input type="button" value="Save and Copy"/> |
| <input type="button" value="Save"/> <input type="button" value="Cancel"/> | |

The top section of the page contains the profile information for this account. The 'User Account' field contains the user's name and the 'Account ID' field contains the user's login. You can change the values by typing the new information into the field(s) and clicking the **Save** button. If you change the Account ID, the system will check to see if the ID is unique. If the ID is not unique, the profile information will not be updated.

Change the password by clicking the **Change Password** link. This will open a separate window which shows the current password. Enter the new password in both fields then click the **Change Password** button to save the new password. Click the **Cancel** button to go back without saving.

| | |
|--|--------|
| Old Password | ACME03 |
| New Password | |
| Confirm Password | |
| <input type="button" value="Change Password"/> <input type="button" value="Cancel"/> | |

If you would like this user to be forced to change his/her password after a certain number of days, enter that number in the 'Password duration (days)' field. This option can be overridden from the "General System Settings" section. See page 8 for more information.

Changing the 'Work Requestor Only' value will allow you to change a "Standard" user to a "Work Requestor Only" user, and vice versa, without needing to delete and re-create the user.

This last option allows you to use the current account as a permissions template and copy the rights to any other Standard account in your system. Click the drop-down menu to display the available users you can copy to, then click **Save and Copy**. The permission set will be copied over to the selected user's permissions.

Setting the Privileges/Rights

Check the desired options for this user and press "Save" button below when finished.

| Menu Items Check/Uncheck all | Additional Options Check/Uncheck all | Tabs Check/Uncheck all |
|--|--|--|
| MAIN | Asset File | <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 checked="" type="checkbox"/> Navigation |
| Request Center | <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 |
| Work Center | <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 | Contacts | <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 | Data Dictionary | |
| Purchasing Center | <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 | Form Layout | |

The list of security rights is divided into sections. The left-hand column (Menu Items) contains the items available on that user's **Navigation** Tab. Allowing the user to see an item on the menu does not always entitle that user to manipulate the features of that item. The permissions listed in the middle of the screen (Additional Options) provide precision control over specific menu items. Individual security functionalities typically control access rights to a menu item, adding a new record, editing a record and deleting a record. The right-hand column (Tabs) performs the same function as the left-hand column, except it applies to the version 10 tabs.

Example: Allow add and edit rights for work orders. First place a checkmark in front of the Work Order Center option in the "Menu Items" column (left) and/or the Work Orders option in the Tabs column (right) so the user has a link to work orders. Next, scroll to the Work Orders section in the Additional Options column (middle) and place a check in front of access file, add records, and edit records. This combination of security settings will give the user a link to work orders, allow access to the work order screen when the link is clicked, and allow user to add and to edit work records.

Place a check mark next to each security privilege you wish that user to have. Once satisfied with your selections, click the **Save** button to update the user's profile. A screen will appear informing you of the security update's success. You can then return to the list of users in the system to continue editing other user profiles. Repeat the process to change other users' accounts. When you are finished changing one or more user rights, click the **Return to Main Menu** link to exit User Administration.

Permission Explanation

In general, permissions are ranged in levels from the most basic, Access, to the most complete, deletion.

- Access File - allows the user to view the records in that area of the system.
- Add Records - allows the user to add new records in that area of the system.
- Edit Records - allows the user to edit existing records in that area of the system.
- Delete Records - allows the user to mark records for deletion in that area of the system.
- Key Change - allows the user to change the Key Field ID for records in that area of the system (only available in Parts and Assets).

Permission Areas

- **Asset File** controls what users will be allowed to do with Asset records.
- **Contacts** controls what users will be allowed to do with Maintenance Contacts records.
- **Data Dictionary** controls what users will be allowed to do with Data Dictionary records. This section of the system should be restricted to only those users who have System Administration training.
- **Form Layout** controls whether a user has the permission to customize the forms within the system.
- **Form Options** controls whether a user has permission to change the layout of list views in the system.
- **Maintenance Calendar** controls the permissions to the Calendar.
- **Master Parts Listing** (for those systems with a Master Parts file) controls whether users will be allowed to view that parts file.
- **Meter Readings** controls what users will be allowed to do with Meter Readings.
- **Nameplate Info** controls what users will be allowed to do with the Nameplate information on assets.
- **Nameplate Lists** controls what users will be allowed to do with Nameplate List records located in the Data Center.
- **PM Assignments** controls what users will be allowed to do with the 'Assignments' table located on the PM form. Your account must have the Time Card/Planner module installed for this option to function.
- **PM File** controls what users will be allowed to do with the PM Schedules on assets.
- **PM Procedures** controls what users will be allowed to do with PM Procedures located on the PM Schedules.
- **PM Tasks** controls what users will be allowed to do with the PM Task File Listing records.
- **Parts File** controls what users will be allowed to do with Inventory records.
- **Parts Information** contains permissions for specific inventory functions: receiving and purchasing parts, making adjustments and key changes. ['Create/Modify Purchase Order' will give a user permission to modify the PO header information and also to create a purchase order from a part.]
- **Project File** controls what users will be allowed to do in the Project Master File.
- **Purchase Order** controls what users will be allowed to do in the PO Center.
- **Query Tool Master** controls what users will be allowed to do within the query tools. Access will permit users to run reports existing reports only. 'Add' will permit a user the ability to add new reports the Query Builder. 'Edit' and 'Delete' permits the user to change and remove Public reports which are not marked as "read-only." A user always has full control of his own reports.
- **Related Asset/PM Parts** controls what users will be allowed to do with the Related Parts table found on the Asset and the PM schedules forms.
- **Request Manager** controls the general options users will be allowed to do within the Request Manager. To allow for permissions to process the requests, additional permissions must be assigned under the Work Request Center permissions area (see below).
- **Suppliers** controls what users will be allowed to do with the Item Suppliers table available on the Parts records.
- **System Filter** controls
- **Time Card Settings** controls what the user can do on the Time Card screen. These permissions can be ignored if the Time Card/Planner module is not installed.
- **WO Procedures** controls what users will be allowed to do within the WO Procedures table available on work orders.
- **Work Order Assignments** controls what users will be allowed to do with the Assignments table located on the Work Order form.
- **Work Order Center** contains specific permissions for work order functions: closing and re-opening work and creating charges on work orders.
- **Work Order Request** contains the permissions for processing work requests.
- **Work Order Types** controls what users will be allowed to do with Work Order Type records.
- **Work Orders** controls what users will be allowed to do with work orders.
- **Workflow Manager** controls what users will be allowed to do with the Workflow manager.

Export Data

Exporting is the process of copying, packing, and sending data from the system to your computer. To export your data from the eMaint X3 system, click on **Export Data**.

Follow the instructions provided on screen to complete the export/download process.

- Select the table(s) by placing a check mark next to the data table(.dbf) you wish to export.
- Choose from three formats: Database table, Excel or Text.
- To begin exporting click the **Download Now** button. This will start the FTP process for sending files to your PC.
- When prompted select **Save this file to disk**, and choose the directory/folder on your PC where you want to save the data being sent.
- The file(s) that were transmitted are stored within a ZIP file. Use your local PC's ZIP software to unzip the files.
- The ZIP file is password protected. The password is the same password for the user who exported the data, in all capital letters. If JOEUSER is exporting then JOEUSER's password will also be used as the password on the ZIP file.

NOTE: The exporting process may take some time to complete depending on the size of the data being sent to your local PC. Your login session may expire while you are waiting for the process to complete. Login again to continue working in the system.

Manage Data Dictionary

This utility allows direct access to the data dictionary table (system name datadict). This feature uses a list view and detail view like other areas of the system to access and manipulate records in the datadict table. This table holds the settings and attributes the system uses for displaying and working with data throughout the system. This table defines what tables exist, what fields exist within each table, and what indexes are defined on each table.

The datadict holds these definitions by containing individual records for each table, field, and index definition. Each record has fields, which are used to hold the system settings. Each field has its specific purpose as related to the particular record and record type to which it belongs. This feature is in place to allow system administrators with the understanding of the workings of the system to view and edit the system settings directly.

NOTE: Even the datadict table, fields, and indexes are stored within the datadict table itself.

*This dictionary is fundamental to the workings of the entire system. **We urge you to use extreme caution if you must work in this area.** If you are not sure about changing a particular field in the data dictionary, **DO NOT** change it. Any changes you make in the data dictionary will affect the way fields and forms function. Improper use can possibly break your system. Alter it with caution.*

An interface with the datadict has been provided from within 'Customize Form.' Customizing the forms in the system is explained in detail later in this manual. It is advisable to use this method of customization rather than entering the data dictionary itself.


















































Remove Deleted Records

Removing records from the system is a two-step process. The first step is to use the delete links throughout the areas of the system to mark a record for deletion. At this point, the record has only been removed from the list view. The record can still be located and undeleted by using the **Next** and **Previous** links on a detail form to navigate to it and clicking the **Un-Delete** link at the top of the form.

The second step permanently removes the record from the system and uses the **Remove Deleted Records** link as a central location for this process. The screen displays all the tables of data that can hold marked records and the option to view and remove each table individually.

View a list of items by clicking the Magnifying Glass icon in the "View" column. This will open a window with a list of records that are marked for deletion. This is where you can review marked records before removing any data.

To remove the records, click the Trash Can icon. A confirmation window will appear to verify your choice. Clicking **Ok** will remove the records, clicking **Cancel** return you to the records screen.

| Table | Remove | View |
|--------------------------------|---|---|
| Asset Parts Cross Reference |  |  |
| Assets |  |  |
| Charges |  |  |
| Contact Table |  |  |
| Data Dictionary |  |  |
| Department Codes |  |  |
| Form Link |  |  |
| Graphs |  |  |
| HtmlForm |  |  |
| Inventory |  |  |
| Inventory Journal |  |  |
| Items By Supplier |  |  |
| Managers Field List |  |  |
| Master Inventory Location List |  |  |
| Meter |  |  |
| Name Plate Info |  |  |
| Nameplate Attributes |  |  |
| Notebook |  |  |
| Options Data File |  |  |
| PM |  |  |
| PM Parts Cross Reference |  |  |
| PM Procedures |  |  |
| PO Transactions |  |  |
| Part Locations |  |  |
| Payables Invoice Table |  |  |
| Projects |  |  |
| Purchase Order Master File |  |  |

Note: Please be sure you are removing the proper records before continuing. This is a permanent process and cannot be recovered.


Customize My Own Page

You can personalize the **Home** tab by either using the HTML editor or by entering your own HTML code. It is recommended you use the **Edit Content** link on the Quick Bar of the **Home** tab instead of this menu option. The **Edit Content** link uses an easier HTML editor.



Click the **Customize My Own Page** link to access this feature. You can view the way the page looks and change it using the many tools available in the HTML editor. You can also view and edit the code directly by clicking the **HTML** button to switch views.


Please use caution if you make changes in this area using the HTML code source option.


Save Changes | Graphic Management | Learn More | Return to Main Menu




Personalize Home Page

Use the html editor below to modify the My Emaint page to suit your own needs. You can use the 'Preview' button  to see the result in a stand-alone page. Once you are satisfied with the changes, simply click the 'Save' button  (or the Save Changes link in the top portion of the screen) and your changes will be saved and you will be taken back to the main menu. If desired, you can also modify the HTML code directly by clicking on the 'Source' button.

You can also use your own graphic files, just click on the 'Graphic Management' to upload or delete files on our server. Once the file is uploaded, click the 'insert/edit' button  and type /graphics/myfilename.*.htm*. (Note: The file extension is necessary.)





Acme Manufacturing Company
100 Main Street
Washington, DC 12345
USA

Maintenance Department Links
[Maintenance Technology.com](#)
[ReliabilityWeb.com](#)
[Plant-Maintenance.com](#)

Send e-mail to Maintenance Dept.
maintenance@acme1.com

eMaint Online users can customize this "My eMaint.com" home page via the Administration menu, 'Customize my own page' option.

List View Administration

An example of the list view:

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

What are List Views?

The list view is a tool used in many areas of the system for displaying records in a list form.

The list will display a pre-defined selection of fields as columns. These columns are chosen by either the System Administrator or a user with the appropriate permissions using the **Form Options** link located at the bottom of the list. Additionally, the list can be filtered by individual users to display records matching specific criteria. Once the user finds the desired record in the list, they can use the provided links to access that record via the detail view tool.

By default, list views are configured in a generic manner throughout the system. If the default settings are not appropriate for your situation, the provided tools make altering their configurations easy.

Configuring list views

The user or system administrator can change the fields displayed in a list view as well as other properties by using the **Form Options** link provided at the bottom of each list view page.

| | | | | | | | | |
|-----|------------|------|-------------------|------------|---|---|------------|--------|
| 159 | 11/01/2007 | 1008 | Forklift | CORRECTIVE | 2 | O | 11/02/2007 | Active |
| 152 | 10/30/2007 | 1002 | Oil Furnace | CORRECTIVE | 2 | O | 11/01/2007 | Active |
| 151 | 10/24/2007 | 3000 | Lighting - Street | PM | | O | | |
| 150 | 10/12/2007 | 3325 | Compressor, Air | CORRECTIVE | 2 | O | 10/15/2007 | Active |
| 148 | 10/10/2007 | 1040 | HVAC | PM | | O | | |
| 147 | 10/10/2007 | 3000 | Lighting - Street | PM | | O | | |
| 148 | 10/10/2007 | 1008 | Forklift | PM | | O | | |

Form Options

General Properties

Clicking on the **Form Options** link will open the “Form Options” window. The “General Properties” section allows for control of the general window properties for that list view.

By default, clicking a record opens its detail within the current window. If you would like the detail to open in a separate window, change ‘Open Detail in New Window’ to “Yes”. You can also change the size of the new window by entering the new values, in pixels, to the height and width fields. Remember that you can always maximize the window by clicking the maximize icon in the top right-hand corner of any window.

When you are viewing many records without a filter, the list view will separate the records into pages. The ‘Records Per Page’ option allows you to adjust the number of records per page. If a filter is placed on a list view, the window will display all the resulting records on one page regardless of this setting.

The last option in the general properties section allows you to choose how the page is displayed. The default option, “Fit To Page”, tries to adjust the size of each column so each one is displayed in the window. However, if you would like to view each column without resizing the contents, choose the “Large” option to use each field’s maximum width. A vertical scroll bar will appear at the bottom of the browser that will allow you to view fields that were pushed off the viewable window.

Note: If you use a high resolution on your screen and you are viewing the screen maximized, you will see more information than if you were viewing the screen with a lower resolution.

Form Options [Learn More](#)

Specify the properties For This Form.

General properties

Open Details in New Window?: NO

New Window Width: 750

New Window Height: 550

Records Per Page: 150

List width type: Fit to page

Columns Chooser

WO No. Account #

WO Date Add

WO Type

WO Status

Location

Priority

Status Code (work)

Save

Columns Chooser

This is the section where the administrator chooses which fields will be displayed in the list view and in what order. Add a field by clicking the drop-down box on the right of the Columns Chooser section and choose the field from the list. Click the **Add** button to place the new field in the box to the left.

You can move the fields to a different column by highlight the field in the left-hand box and using the arrow buttons to move it up (left on the list view) or down (right on the list view). Remove a field from the list view by highlighting the field in the left-hand box and click the **X** button. This will send the field back into the available fields list on the right.

When you are finished making your changes, click the **Save** button. If you don’t want to save your changes, click the red **X** (close button) on the top right of the window.

The **Form Options** is available for all list views, including related tables, though sometimes it is called **Options** (see below).

| PM Schedule | | | | | | | | | | | |
|----------------|----------------------|--------------------|--------------|-------------------------|------------------------|------------|--------------|------------------|--------------------------|-------------------------|------------|
| Produce 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 | | | | | | | | | | | |

Filter Operators

The text boxes located at the top of a list view can be used to search through the records in the list and display the results. Filter operators are used with search criteria to achieve a more specific result.

%

The percent sign is a wild card operator. It can be used as a placeholder to represent values.

Some uses are:

- %value – looks for all data that ends with 'value'.
- value% – looks for all data that starts with 'value'.
- %value% – looks for all data that contains 'value'.

>, <, >=, <=

These are relational operators. A relational operator compares two values and determines the relationship between them. In this situation, the first value is the data contained in the list and the second value is what you enter in the filter text box. Place one of these operators in front of the filter value to compare the data to your filter.

Some examples are:

- >01/01/2002 – looks for all dates more recent than January 1st 2002.
- >=01/01/2002 – looks for all dates more recent or are January 1st 2002.
- <M – looks for all values that start with a letter less than M (A-L).
- >N – looks for all values that start with a letter greater than N (O-Z).
- >=C – looks for all values that start with the letter C or greater (C-Z).

NOTE: Filter values are not case sensitive. Thus APPLE is treated the same as aPPLe.

Forcing Users To Apply Certain Filters.

In certain cases the administrator may want to force a user to always use one or more pre-determined filters. This may be the case if that user is only to view and work with a specific group of records such as open work orders. Forced filters are set by adding key characters to the entered filter values.

Steps to lock a filter:

1. Decide which specific user will have locked filters.
2. Log into the system using that user's username and password.
3. Access the list that will receive the locked filters.
4. Enter the appropriate filters to the list.
5. Verify the correctness of the records displayed.
6. Place the key characters :: in front of the filter value.
7. Apply the filter to re-display the list.

Filters are now locked into place for this user.

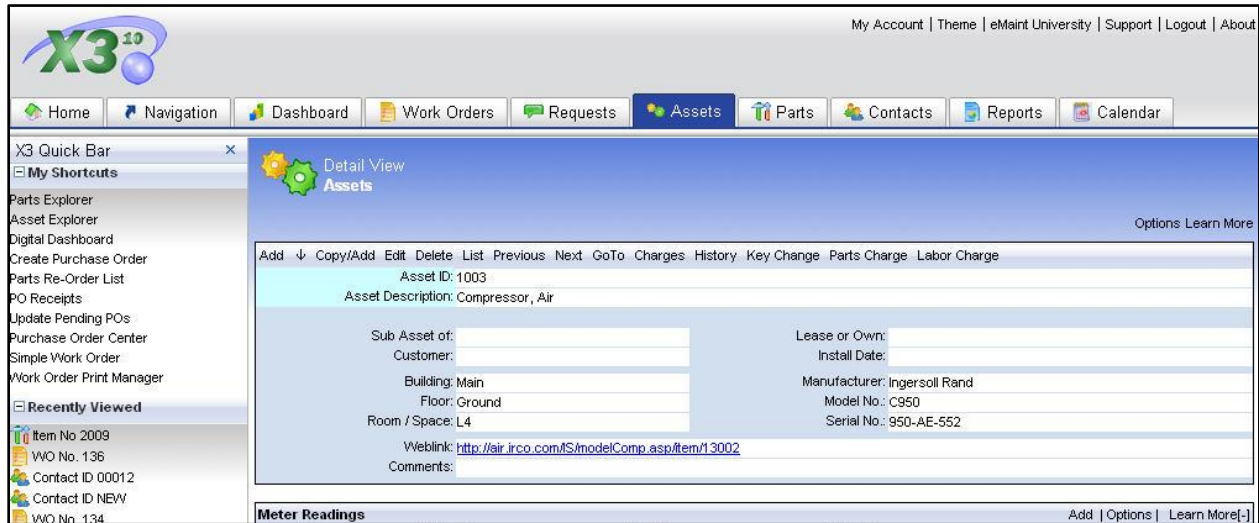
NOTE: There is no way to unlock a filter yourself. You must call the eMaint support department to unlock it for you. Please use extreme caution when using this feature.

Detail View Administration

What are Detail Views?

Detail views are tools for accessing, editing, adding, and deleting a specific record from a specific table of data. Users can access the detail view of a record by using such tools as list views or clicking direct links such as the Asset ID field on the work order form.

An example of the detail view:



Customize Form

'Customize Form' is a feature designed to ease the management of the detail view. It also provides a user-friendly interface for the data dictionary. To access this feature open the detail view you wish to modify, click the **Options** link then click **Customize Form**. Users must have the "Modify Form Layout" permission to see the **Options** link on the form.

NOTE: The detail view currently open is the detail view that will be affected by any changes you make.

Form Design Options

At the top of the form, there are options for controlling the basic layout of the page.

Form Font Settings

This option allows the administrator to choose what font will be used on this particular detail view.

Enter the font family in the 'Default Form Font' line and the applicable size and style information in the appropriate box. For the color fields, select an HTML color value setting (hexadecimal or HTML compliant). Ex. BLUE is known by HTML and will display that color. For more specific colors add a hexadecimal color code such as #0066CC for another variation of blue. Click update for these settings to take effect.

Form Font Settings

Default Form Font

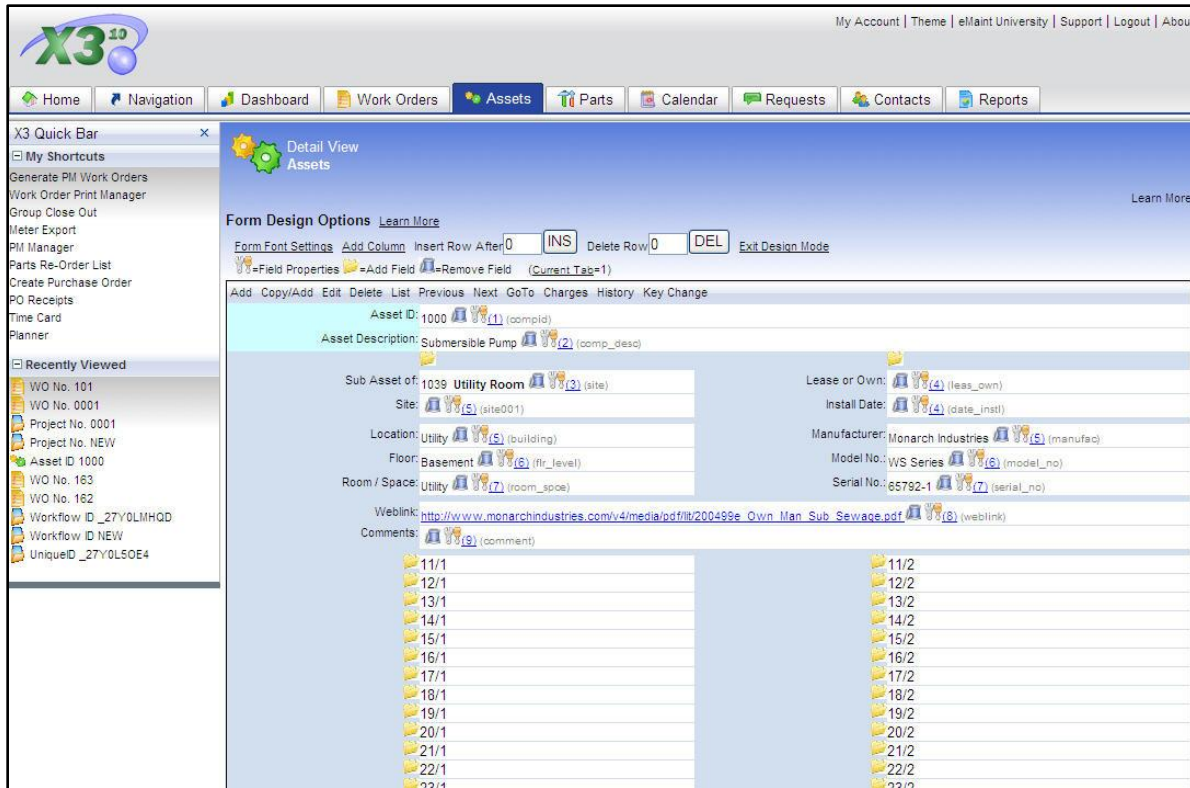
Default Font Style

Default Font Size

Default Font Color

Default Background Color

Leave all fields blank for DEFAULT values.



Add a new column

While designing or changing the detail view, you may wish to use a new column. This can be achieved by clicking the **Add Column** link. A new column will be added to the right of any existing columns.

Remove a column

To remove the column furthest to the right, remove all fields from it and exit Design Mode.

Insert Row After

Insert a row on the form by entering the number of the row that will be above the new row, then click the **INS** button. For example, if you want a row between rows 5 and 6, enter "5" in the 'Insert Row After' box and click the **INS** button. All rows after row 5 will be moved down and a new row will be placed into the 6th row.

Delete Row

Enter the number of the row to be deleted and click the **DEL** button.

Adding, Removing, & Arranging Fields

The Customize Form feature also allows you to modify the layout of your detail views. This is useful for removing default fields you may not need or adding custom fields you do need.

Adding

First decide what field needs to be added to the detail view (be sure it is not in use already). Find a row/column position which has the folder icon . This indicates an available field location. Click the folder icon to open the "Add Field to Form" screen.

The "Add Field to Form" screen has two sections. The first, "Select Existing Field", allows you to choose from a list of pre-configured fields. The second, "Create New Field", allows you to create your own fields.

Tip: You should always check to see if the field you need exists in the “Existing Field” section before creating a field of your own.

To use an existing field:

- Use the list in the drop-down box to find and select the required field.
- Click on the **Select Field** button to place your field on the detail view. You will receive a confirmation message that says: “Settings have been saved”.
- Click the **Close Window** link to close the window and refresh the detail view page.

To create a new field:

- Enter the ‘Field Name’. This value is the name the system needs to identify the field. Once created, it cannot be changed. The name is limited to 10 characters (beginning with a letter) and cannot contain spaces. If a separation is needed, use an underscore.
- Enter a description. The ‘Description’ is what the user will see on the form and may be entered as normal text.
- Choose a field type. The most common type of field is text, but you can also choose Multi-Line text (memo), Numeric, Logical (True/False), Date and Date & Time. The field type cannot be changed after field creation.
- The ‘Maximum # of Characters’ value only needs to be entered on Text and Numeric fields (for Numeric fields, also indicate the number of decimal spaces). You can increase this number later but you cannot decrease it.
- Click the **Create Field** button. You will receive a confirmation message that says: “Settings have been saved”.
- Click the **Close Window** link. The detail screen will be refreshed to show your new field.

[Learn More](#)

Add Field To Form

Select an existing field OR create a new field

Select Existing Field

Table Name: COMPINFO

Field: ▼

Create New Field

Table Name: COMPINFO


Field Name: *

Description: *

Type: * ▼

Maximum # of * (decimal places for
Characters: numeric fields)

Removing


Locate the field you wish to remove and click the trash can icon . The field will disappear from the detail view and a folder icon will take its place. Removed fields become available in the “Select Existing Field” list and can be selected for placement elsewhere on the form.

Note: Removing fields from the detail view does not delete the field or any data it contains.

Arranging

Arranging fields on the detail view is a process of removing and adding fields until the detail view appears to your liking. Remember that you cannot add a field that is located somewhere else on the detail view. You will have to remove it from one location before adding it to another.

Tab Order

After you have selected the fields to display, you can then assign a “tab order” when in edit mode. This allows you to use the Tab key on your keyboard to navigate around the form in the order you specify. The current tab order is indicated by a number in parenthesis next to the field properties icon . To change the order:

- Click on the **Current Tab=** link to reset the tab value to 1.
- Click on the number link next to the field that will be first. You will be presented with a confirmation of the tab change: “Settings have been saved.”
- Click on **Close Window** to refresh your changes.
- Methodically work through the form, clicking the number next to each field in the order of your tab preference. After each tab selection, you will be told that the settings have been changed.

Editing the Field Properties

Clicking on the Tools icon to the right of any field will display the “Database Field Properties” window.



This window contains the current settings for the field you are viewing and can vary depending on the field. The field’s name will be displayed at the top of the screen along with its system name.

All of the general settings are under the “General Properties” section. Again you will see the Field Name (system name) as well as the Table Name in which the field resides. You will also see the type of field it is: C=Text, M=Memo, N=Numeric, L=Logical, D=Date and T=Date/Time. This information cannot be changed. The options available for change in General Properties depend on the field type and the other properties in use on the field.

- The description, which is the field name the user sees on the form, can be changed by typing it into the ‘Description’ field.
- Enter a default value by typing it into ‘Default Value’ field. This is what the field will be populated with when a new record is created. This value can be changed.
- If you wish this field to be available in the Query Builder, click the checkbox for ‘Query Tool’.
- Check the box for ‘Required’ if this field must be populated during data entry. This will prevent users from saving the form without a value in this field.
- ‘Sortable’ will make this field available for sorting on the list view. Click **Save** after making this selection and be sure to follow the additional instructions on the screen.
- Click the ‘Capitalized’ checkbox to force the field to convert the value to capital letters.

Edit Field: Floor / Level (FLR_LEVEL) [Learn More](#)

Specify the properties For This Field.

General properties

Table * COMPINFO
 Name: COMPINFO
 Field * FLR_LEVEL
 Name: FLR_LEVEL
 Type * C

Description:

Default Value:

Query Tool: Make this field available in the Query Tool

Required: This field cannot be empty

Sortable: Optimize for sorting

Capitalized: Transform field value automatically in capital letters

Text Properties

Lookup Properties

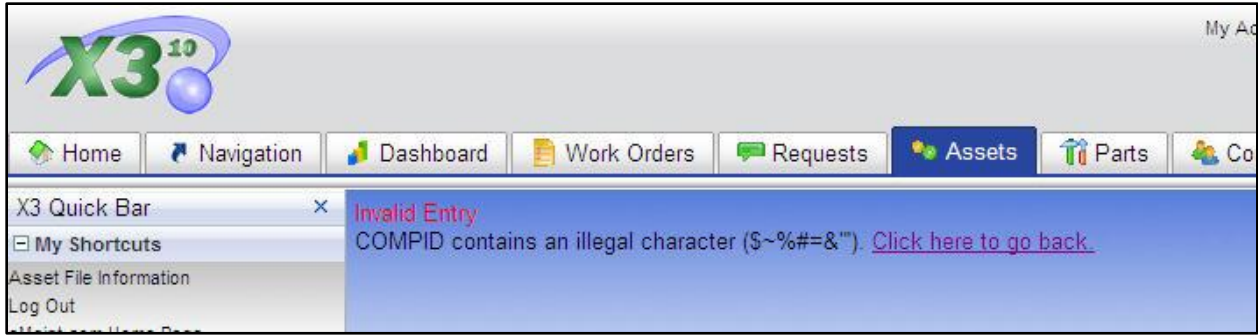
[\[Data Dictionary \]](#)

Key Fields

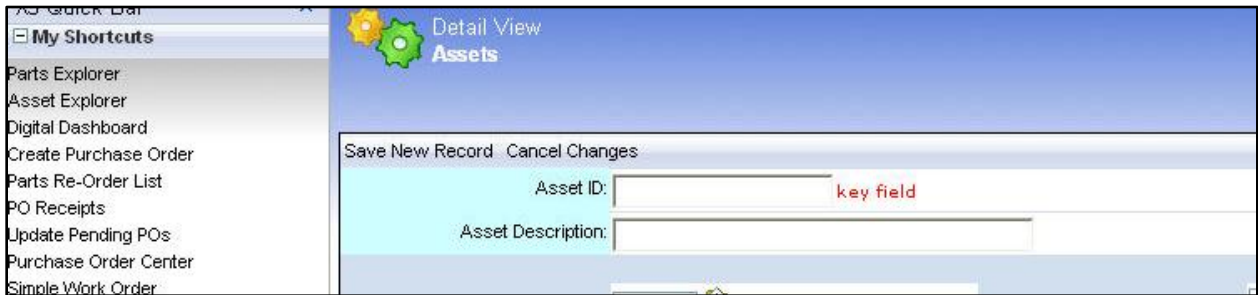
Key fields are special fields within the system that are necessary for a record to be saved. Without a key field, a record cannot be created and a table will not function correctly. **NEVER** remove a key field from a form. Because of the key field’s special role in the system, it has certain requirements that other fields do not have.

Each key field has a specific length which cannot be altered:
 COMPID = 21, ITEM = 15, CONTACTID = 10, TASK_NO = 10

Key fields also restrict the types of characters which can be entered. Valid characters can be any combination of letters, numbers, dashes (-), underscores (_) and periods. If you enter a symbol that is invalid, you will receive a message indicating the error and a link to go back to the form to reenter the key field.



Key fields prominently display their designation on their properties page and in add mode:



or edit mode

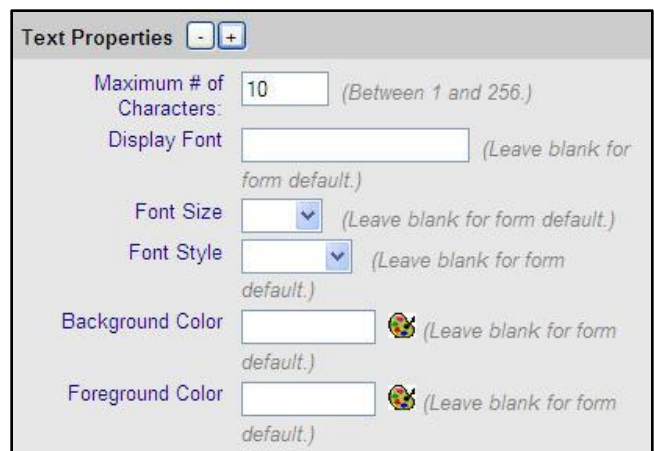


on any record. While in add mode you will be able to enter the ID characters. In edit mode, you will only be able to view that ID. It is strongly recommended that you do not make changes to the properties of a key field. Changing the key field may impact its key field status.

Text Properties

Click the + button to expand the “Text Properties” portion of the screen. This will enable you to view and edit such characteristics as ‘Maximum number of Characters’, the ‘Display Font’, ‘Font Size’, ‘Font Style’, ‘Background Color’, and ‘Foreground Color’.

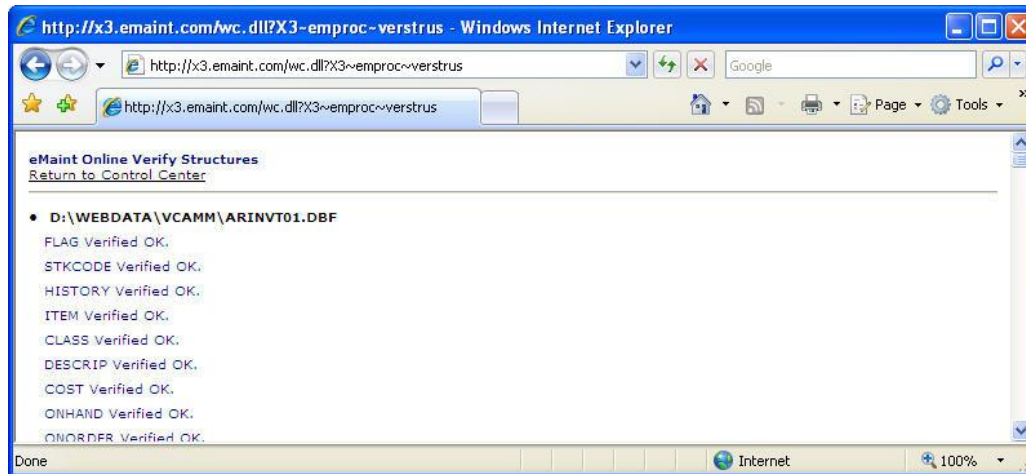
Note: Please see the next section, “Verstrus” when editing the ‘Maximum # of Characters’ field.



Verstrus (Verify Structures)

Anytime you change the Maximum number of characters for an existing field, you must run a process called 'VERSTRUS' from the address line of your browser window to update the system's databases.

Enter the address <http://x3.emaint.com/wc.dll?X3~verstrus> in your address bar and hit enter. The process will run then a screen similar to the one below will display the verstrus results. Click the **Return to Control Center** link to return to the main screen.



Do **NOT** change the maximum number of characters for any of the key fields in the system.

Look Ups

There are three types of Lookups that can be used on a field: **Lookup**, **Lookup from Table**, and **List**. Each is useful for creating uniformity in the way information is entered in your system. Uniformity is the key to accurate reporting in any database system.

Lookup Properties

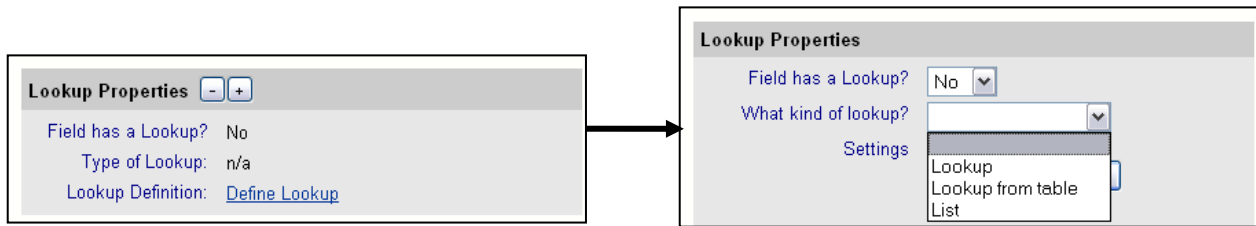
The "Lookup Properties" section can be expanded by clicking the + button next to the "Lookup Properties" heading. To define a lookup, you must first change 'Field has a lookup?' to "Yes". Then you can click on the drop-down for 'What kind of lookup?' to choose the type of lookup this field will use.

Lookup – This lookup is also called a Values lookup because it allows you to type in values to be selected from a simple drop-down on the field. This is a very basic lookup. All of the values for the lookup are entered in the properties for the field.

Lookup from Table – As its title suggests, this lookup has values which are pulled from a table in your system. The table can be one that is already in use or one which you create specifically for this field. This lookup is particularly useful for populating a single field from a list that can be added to, edited and deleted from.

Of this type, the Pop-up/Drop-down variety is the most versatile. It allows your users to use both methods to select the values for the field. It also allows for direct manipulation of the table by those who have editing permission on the form.

List – This lookup is designed to grab information from a table and use it to automatically populate specified fields in another table. For example, the work order form pulls information about the asset directly from the asset detail view. Another example is the PM Schedule which pulls information about PM Tasks directly from the Task File Listing. This type of list not only ensures conformity but also saves massive amounts of time. One click of the mouse can populate up to ten fields of information.



Lookup

Select this option, then click **SAVE/DEFINE**. In the 'Hand entered values' box, type the values that you want to display in the lookup (one value per line). To enter a blank line, leave one line black and hit Enter/Return on your keyboard.

If you are editing a field with existing data, clicking the 'Populate list with existing field values' link will pull this field's value from every record and place it into the list automatically.

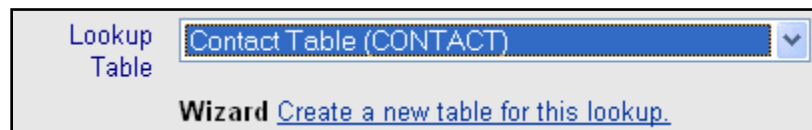


When you're finished entering data into the box, click the **Proceed** button. You can now close this window and return to the Form Design screen. In data dictionary, this type of lookup is also called a Values lookup.

NOTE: The last entry of the list will be the default value for the field unless a Default Value is used in the General Properties.

Lookup from Table

This type of lookup associates a simple lookup table to the field. You can either choose an existing table in the system with the drop down box (shown below) or use the Wizard to create a new table for the lookup.



If selecting an existing table in your system, choose the key field of your chosen table with the 'Lookup field' drop-down list and choose the table's description field with the 'Lookup description field' drop-down list.

If selecting the Wizard, the system will create a new table with two fields, 'Code' and 'Description'. These field will be automatically populated into the 'Lookup field' and Lookup description field' drop-down lists for you.

Finally, select the 'Style' of the lookup. A "Drop-Down" is a list contained in a collapsible field, similar to the 'Lookup field' mentioned above. A "Pop-Up" is a list that opens in a separate window. This window allows you to add, edit and remove values in your list. When creating a new table, you will need to select this option so you can populate the table. A "Drop-Down/Pop-Up Combo" gives you the option to use the drop-down list or the pop-up window. When you have completed the page, click **Proceed**. This will save the settings and you can now close the screen.

To add values to the Lookup Table that you just created, go into add or edit mode and click on the folder icon to the right of the field. This will open the Look-up Values table. Click the **Add New Record** link to populate the table with the desired values.



List – This type of Lookup pulls information from another table in the system and places it on the form. An example of a list lookup is the 'Asset ID' field on the Work Order form. Using the folder icon, you select an asset from the list and the Asset ID, Asset Description, Location, Building and Site are pulled from the Asset table onto the Work Order table. List lookups can pull information from any existing table in your system.

Create a list lookup by selecting "List" as the type of Lookup then select the 'Lookup Table'. Click **Proceed** to continue.

In the Field Mappings section there are two columns. The left column represents the 'Get Data From' fields (the table the information is coming from). The right column represents the 'Send Data To' fields (the current table to be populated).

- Begin mapping your fields by selecting a field in the left drop-down list.
- Identify the field on this form using the drop-down list in the right column.
- When the drop-down lists are displaying the appropriate fields, click the + button to the right of the first field mapping. This will populate the system names of your chosen fields onto the field mapping list.
- Continue this process until

all of the fields that you want to have populated are in place.

- Click **Save** when you have finished the process. This will return you to the Lookup Properties section. From here, click the **Return to main properties page** link on that screen to return to the Main Properties page.

Now that the lookup has been created, you can click on the folder icon next to the field with the list lookup to open the list view and search for a record. When you click the **Select** link next to the desired record, the remaining fields will be pulled onto the form.

| Contact ID | Full Name | Company | Category | Work Phone # |
|------------|----------------|-------------------------------|------------|--------------|
| 3001 | John Smith | McMaster Carr | Supplier | 630-833-0300 |
| 3002 | Pete Wells | Grainger Industrial Supply | Supplier | 218-624-4274 |
| 1001 | Bob Crawchuck | Acme Company | Employee | 206-734-1522 |
| 1002 | Glenn Rossman | Acme Company | Employee | 206-734-1522 |
| 1003 | William Reeder | Acme Company | Employee | 206-734-1522 |
| 1004 | Rich Notella | Acme Company | Employee | 206-734-1522 |
| 1005 | Ben Higgins | Acme Company | Employee | 206-734-1522 |
| 2001 | Joe Button | Button Industrial Contracting | Contractor | 206-412-5551 |
| 2002 | Robert Hickman | IME | Contractor | 209-457-8961 |
| 1006 | Jeff Werth | Acme Company | Employee | 206-734-1522 |
| 3003 | Don Williams | Central Isuzu Truck | Supplier | 301.322.9000 |
| BILLMA98 | Bill Mason | Acme Company | Employee | 201-555-1234 |

Managing Related Tables

Related tables are small boxes located below the detail view's main form. They are used throughout the system to integrate information from one table to another. For example, the Parts File has the 'Item Suppliers' table which allows you to link suppliers in the contact table to you parts. Virtually every form in the system has, or can have, related tables attached to it.

Closing/Viewing tables

There are two ways to hide a table from view:

Shade/Unshade – Click the minimize link to “shade” the table. This will leave only the title bar in view. Click it again to “un-shade” the table.

| Qty Ordered | Options [-] | Ext. Cost |
|-------------|---------------|-----------|
| 1.00 | | 12.99 |
| 1.00 | | 23.24 |
| 2.00 | | 6.60 |
| 2.00 | | 10.26 |

Manage Related Tables – Click the **Options** link at the top of the page and select **Manage Related Tables**. A window will appear with a list of tables available for this page. Uncheck a box to hide the table and place a check in a box to view the table. Click **Save** to close the window and view changes. Click **Close** to close the window without saving changes.

*Note: Users must have the “Modify Form Layout” permission to see the **Options** link on the form.*

Show Related Table

Meter Readings

PM

Parts

Name Plate

Creating Related Tables

If you require a related table that doesn't exist in your system, you can create your own related table. This will create a blank template which gives you the liberty of customizing the content of the table. To create a new related table:

- Enter the detail view of the section where the table will be associated.
- Click **Options** then **Customize Form** to enter design mode.
- Enter the properties of the form's keyfield by clicking on the Properties icon.
- On the keyfield's properties window, scroll to the bottom and click the **Create Related Table** link.
- Enter the name of related table you are creating in the box provided and click the **Create the related table** button.
- You will receive a confirmation that the table was created and link to return to the keyfield's properties.
- Close the properties window and exit design mode.

Your new related table will appear below the main form. At this point, the table only has two fields; a Unique ID field and a field that shares the new table's name. To add data to this table, click **Add** on the new table to enter add mode for the table. From here you can enter design mode and begin designing your new table.

Data Dictionary

The Data Dictionary is the central table in the system where display options and configurations are stored. This dictionary is fundamental to the workings of the entire system. **We urge you to use extreme caution if you must work in this area.** If you are not sure about changing a particular field in the data dictionary, **DO NOT** change it. Any changes you make in the data dictionary will affect the way in which fields and forms function. Alter it with caution.

Accessing the Data Dictionary

Field Properties

To enter the data dictionary record for a field, open the field's properties and scroll to the bottom of the properties screen. Click the link labeled **Data Dictionary**.

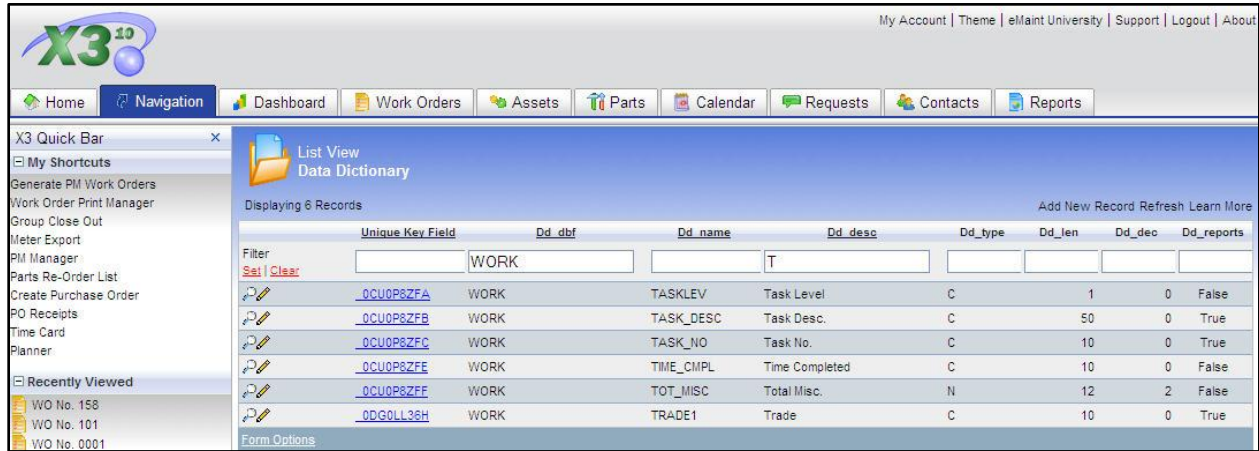
[\[Data Dictionary \]](#)

Data Dictionary File Listing

The Data Dictionary File Listing is available in the Administration section of the **Navigation** tab. When you click it for the first time you will see an unfiltered screen similar to the one below.

| Unique Key Field | Dd_dbf | Dd_name | Dd_desc | Dd_type | Dd_len | Dd_dec | Dd_reports |
|----------------------------|--------|-----------|------------------------------------|---------|--------|--------|------------|
| _0CU0P8XSJ | ACCT | ACCT_NO | Account No. | C | 40 | 0 | True |
| _0CU0P8XSJ | ACCT | ACCT_DESC | Account Description | C | 60 | 0 | True |
| _0CU0P8XSM | ACCT | ADDUSER | Add User | C | 10 | 0 | True |
| _0CU0P8XSK | ACCT | ADDDATE | Add Date | D | 8 | 0 | True |
| _0CU0P8XSL | ACCT | ADDTIME | Add Time | C | 10 | 0 | True |
| _0CU0P8XSP | ACCT | EDITUSER | Edit User | C | 10 | 0 | True |
| _0CU0P8XSN | ACCT | EDITDATE | Edit Date | D | 8 | 0 | True |
| _0CU0P8XSO | ACCT | EDITTIME | Edit Time | C | 10 | 0 | True |
| _0CU0P8ZXT | ACCT | COMMENT | Comment | M | 4 | 0 | False |
| _0CU0P8ZXU | ACCT | B1 | January Budget | N | 15 | 5 | False |
| _0CU0P8ZXV | ACCT | B2 | February Budget | N | 15 | 5 | False |
| _0CU0P8ZXW | ACCT | B3 | March Budget | N | 15 | 5 | False |
| _0CU0P8ZXY | ACCT | B4 | April Budget | N | 15 | 5 | False |
| _0CU0P8ZXY | ACCT | B5 | May Budget | N | 15 | 5 | False |
| _0CU0P8ZXZ | ACCT | B6 | June Budget | N | 15 | 5 | False |
| _0CU0P8ZY0 | ACCT | B7 | July Budget | N | 15 | 5 | False |
| _0CU0P8ZY1 | ACCT | B8 | August Budget | N | 15 | 5 | False |
| _0CU0P8ZY2 | ACCT | B9 | September Budget | N | 15 | 5 | False |
| _0CU0P8ZY3 | ACCT | B10 | October Budget | N | 15 | 5 | False |
| _0CU0P8ZY4 | ACCT | B11 | November Budget | N | 15 | 5 | False |
| _0CU0P8ZY5 | ACCT | B12 | December Budget | N | 15 | 5 | False |
| _0CU0P8XSH | ACCT | | Account | | 0 | 0 | True |
| _0CU0P8XSQ | ACCT | EMPHOURS | ACCT.ACCT_NO = EMPHOURS.ACCT_NO | | 0 | 0 | True |
| _0CU0P8XSR | ACCT | INVTRANS | ACCT.ACCT_NO = INVTRANS.ACCT_NO | | 0 | 0 | True |
| _0CU0P8XSS | ACCT | MISCCOST | ACCT.ACCT_NO = MISCCOST.ACCT_NO | | 0 | 0 | True |

Use the standard list view functionality to find a specific record or set of records by using the filter fields. By specifying a table name (Dd_dbf) to filter on you can display an entire table's definitions and settings. You can also filter for a field name by entering it into the Dd_name field. If you want to filter for the description of a field (user name), enter the information into the Dd_desc field.



To effectively use the Manage Data Dictionary link you will need to know some common table names. Knowing the table name is essential if you are to find the information you need to modify. The illustration below is a list of the most commonly used tables in the data dictionary.

| Table Name | Table | Data Contained |
|------------|----------------------|---|
| ARINVT01 | Inventory Table | Fields from the detail section of parts |
| CHARGES | WO Charges | Fields from the charges section of work orders |
| COMPINFO | Assets File | Fields from the detail section of the asset file |
| CONTACT | Maintenance Contacts | Fields from the detail section of the maintenance contacts file |
| INVSUPL | Inventory Suppliers | Fields from the Item Suppliers section on parts |
| PM | PM Schedules | Fields from the PM schedule information from assets |
| PMPART | PM Parts | Fields from the PM Parts section on PM Schedules |
| TASKS | PM Tasks | Fields available from the PM Task file listing |
| WORK | Work Orders | Fields from the work order detail |
| WO_PROCS | WO Procedures | Fields from the procedures section of work orders |

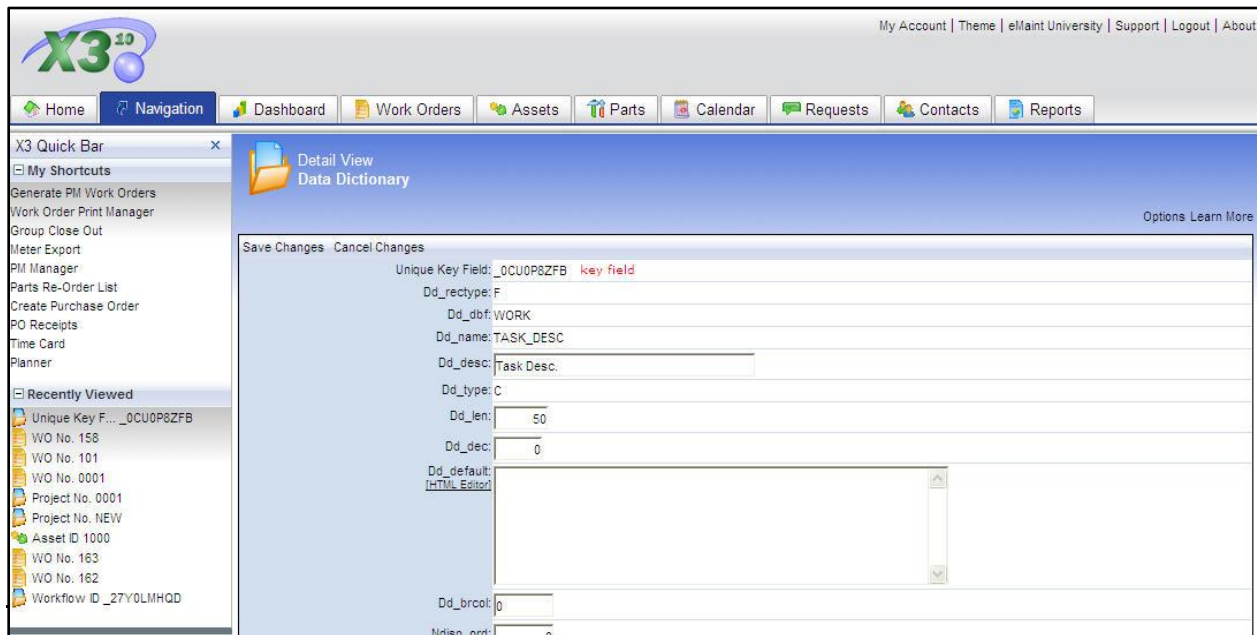
Once you find the field you wish to modify, enter the records the same way you do from any other list view. Click the magnifying glass or the Unique Key Field link to view the detail of the record. Click the pencil icon to open the detail view in edit mode.

Editing the Data Dictionary

To make changes directly to the data dictionary record for a field click the pencil icon on the list view or click the **Edit** button on the detail view. The dictionary record will change and allow for input of data.

Tip: The Data Dictionary’s detail view is a very large page. It is a good idea to locate the line item you want to change before you click edit. That way you will know where you need to be and avoid making errors on other lines.

The following is an example of the data dictionary in edit mode:



Here are some options which can only be modified through editing the data dictionary:

Spaces between rows – You can add an extra space between rows to separate one group of fields from another. You do this by configuring the 'Nspceafter' (numeric) attribute of the last field in the group. Configuring this attribute for a field that is not the last in a row has no affect on row spacing. The numeric value can be up to the number 4. You will need to experiment to find a setting that suits your needs; however “1” usually creates a very acceptable amount of space.

Making a field read only – A field can be configured to prevent changes when a user edits a record. The field on the data dictionary that controls this behavior is 'Lreadonly'. This field can be set to True or False. When set to “True”, no value can be typed into the field at any time.

Adding explanatory text to a field – If you would like your users to see a helpful notation on a field when they mouse over it (for instance, what type of information must be entered in a field), enter that text in 'dd_helptxt'. When a user stops his/her mouse over the field, the mouse will appear with a question mark (?) next to it and the help text will appear for a short period of time.

Spanning columns - If there is more than one column in the detail view and you would like a field in the left-most column to stretch to the right-most column, set 'Lspan_col' to “True”.

NOTE: You should only use this feature on rows where the left-most column has the only revealed field for the row. If fields are contained in the positions that your field will span, these fields will be pushed down and create a new row. This row is generated on the fly and cannot be further configured.

Suppressing fields from particular users - This functionality is useful if some users should be allowed to view or edit information on a record, and others should not. Normally, all users who have access to using or editing a record will be able to view all of the fields associated with that record. For those users that should not have these privileges, you can add their usernames, separated by commas, into the 'Mdisp_sec' (view security) and 'Medit_sec' (edit security) fields – This will remove the field from view when the user accesses the record.

NOTE: Both fields need to be set if a user is not allowed to see or edit a field.

Example: The users JOEUSER1, MARYANN45, BILLDA89 exist in this example.

To suppress these users from seeing or editing a field on the detail view, enter their names as follows into the appropriate field attributes.

For Mdisp_sec enter-> JOEUSER1,MARYANN45,BILLDA89

For Medit_sec enter-> JOEUSER1,MARYANN45,BILLDA89

Routines

What are routines?

A detail view's primary purpose is to allow a user to edit the contents of a particular record of data. A routine is a scaled down version of whatever settings have been established in a detail view. Routines reuse a detail view to populate/edit only a certain portion of a data record. Where the detail view encompasses all the needed configurations for editing the entire record, the routine allows only a portion of the detail view to display.

A good example of a routine is Simple Work Form. The simple work form is the Work Order detail view, but it has been configured to show only a limited number of fields by entering the value "REQUEST" into the 'Mroutine' field on the fields to be shown. Another example of a common routine is "CLOSEOUT". If you would like to have fields appear on the close out form of your work orders, enter "CLOSEOUT" in that field's 'Mroutine'.

You can use a combination of routines on a field as well. For instance, if you would like to have a field show up on the close out form but NOT show on the regular work order form, use the "SUPRESS" routine (to suppress the field on the work order) in conjunction with the "CLOSEOUT" routine (to display the field on the close out form).

Adding or removing a field from a routine

To indicate which fields on a detail view should be included for a particular routine, the name of the routine or routines are entered into the 'Mroutine' field attribute. Routine names should be listed one after the other separated by commas.

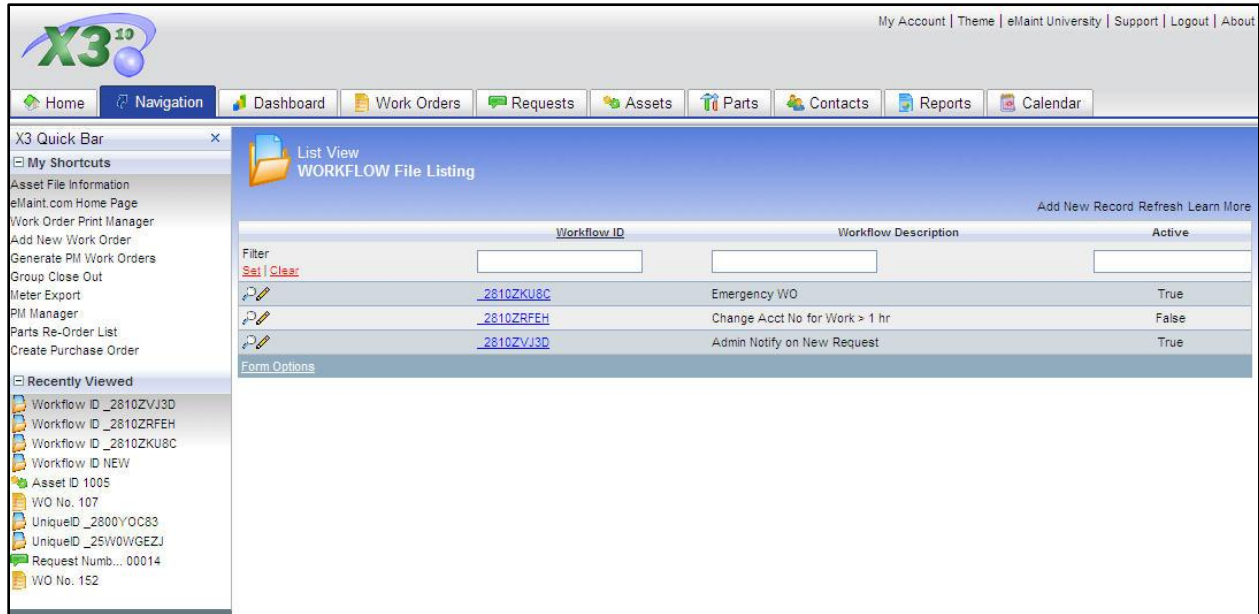
Example: REQUEST,SUPRESS,CLOSEOUT

NOTE: Once a field has been suppressed from the main form, it can only be displayed on the main form again by editing the 'Mroutine' field directly from the data dictionary. (See explanation of Data Dictionary File Listing below.)

Workflow Manager

The Workflow Manager allows you to configure your system to react to certain events. A workflow operates like cause and effect. For example, you create a rule that when a user marks the 'Work Order Type' as "Emergency" and saves the form (cause), the system reacts by changing the 'Assign To' field to a specific contact (effect).

The Workflow Manager is accessed in the Administration section of the **Navigation** Tab.

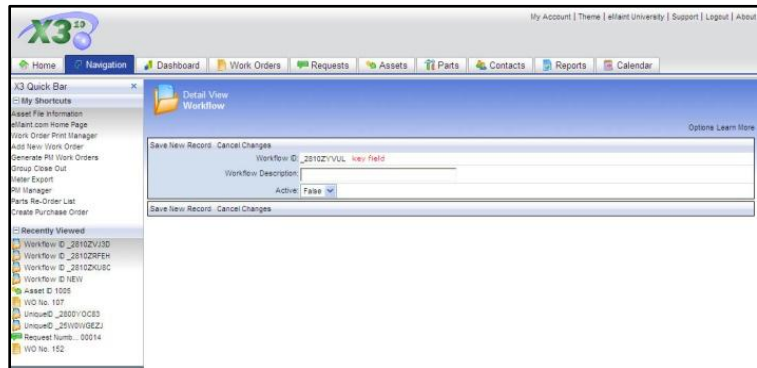


The Workflow File Listing displays all of your workflows in a list view. When you enter this section for the first time there will not be any workflows. Click the **Add New Record** link to add a new workflow

Adding a New Workflow

The blank workflow screen contains only three fields:

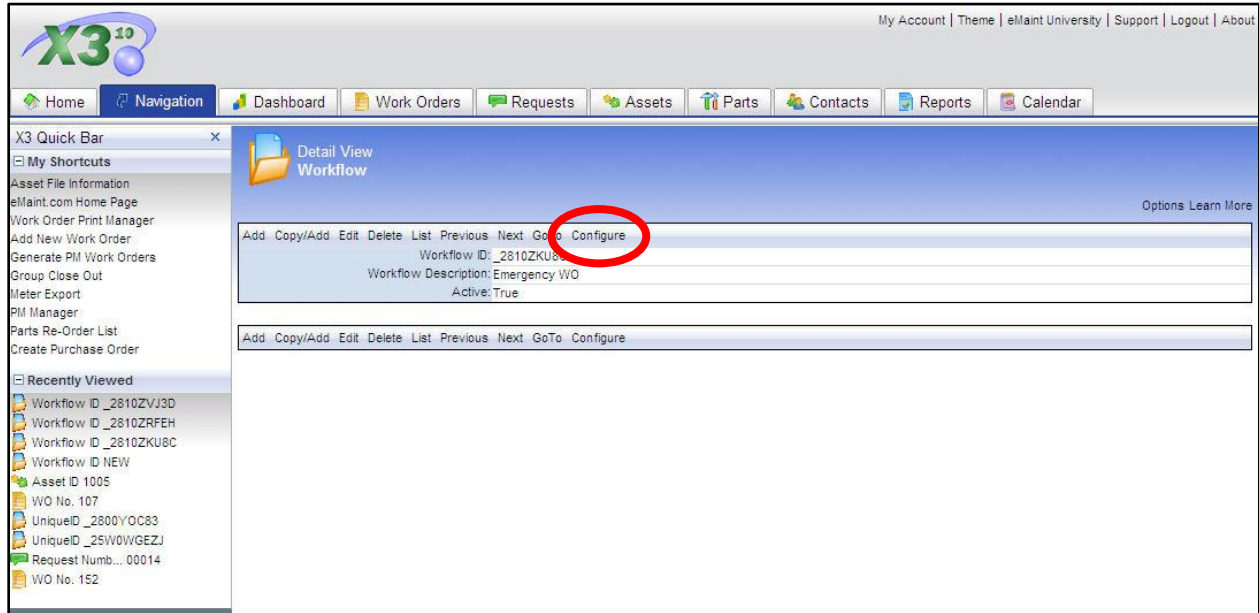
- **Workflow ID** – This is the keyfield for the workflow. This field is populated automatically and cannot be changed by the user.
- **Workflow Description** – Use this field to describe the what the workflow does.
- **Active** – This switch activates and deactivates the workflow. This is a convenient feature for disabling a complex workflow without having to delete it.



When you have completed this form, click **Save New Record**. Your new workflow will be saved and reloaded in Detail view.

Configuring a Workflow

After you have created a workflow, configure it by entering the detail view of the workflow and clicking the **Configure** link.



You will be presented with the X3 Workflow Manager (see Figure 1). Begin configuring your workflow by choosing a rule in the 'Choose a rule' drop-down box. Your choices are:

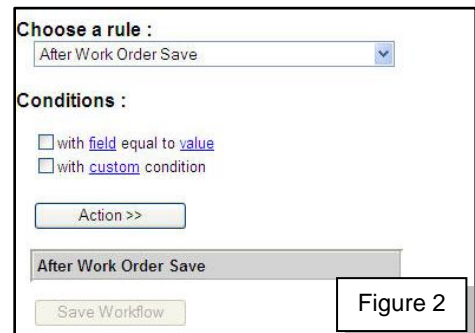
- After Work Order Save
- After Labor Charge
- After Parts Save
- After Asset
- After PM Save
- After Contacts Save
- After PM Part Save
- After Asset Part Save
- After Meter Save
- After Tasks Save
- After WO Procedure Save
- After Work Request Save



Note: As we enhance the Workflow Manager, options may be added or removed. The options listed here may be different than the list on your account.

Your choice will open the rest of the Workflow Configuration page (see Figure 2). The upper portion contains the options for Conditions and Actions and a button that switches between the two. The lower portion with the gray background will display your choices as you make them and allow you to configure them using the links provided.

Configure your Conditions. These conditions need to be in place before the system can perform an Action. Your options are:



- with field equal to value – Place a check in this box to select a field that appears on the form and the value that will activate the workflow.
- with custom condition – Place a check in this box to create your own filter and value.

When you make your choice it will appear in the lower portion of the page (see Figure 3). Next, click the Action button to display the available Actions. These options are:

- replace field with value – When the condition is met, the system will replace the field chosen here with the value you set.
- Execute UDF : function – This option is a support tool. If the workflow requires custom actions, the eMaint support department will place a value here.

Choose your desired Action to add it to the lower portion of the page, directly below the chosen Conditions (see Figure 4).

You are now able to configure the Conditions and Actions. Click each link to open a window that contains the configuration options. When you complete the form, the link will be replaced with your choice (see Figure 5).

When you have set all the options in the lower portion of the Workflow Manager, the **Save Workflow** button will become available. Click it to save your new workflow.

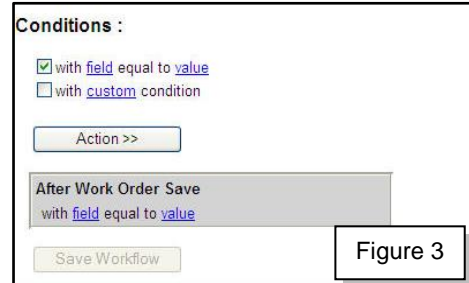


Figure 3



Figure 4



Figure 5

Editing a Workflow

Changing a workflow is similar to adding a workflow. Locate your workflow in the List view and click it to enter the Detail view. If you are only changing the title of the workflow, click the **Edit** link to enter edit mode and make your changes, then click the **Save Changes** link.

If you are changing the workflow rules itself, enter the Detail view as described above then click the **Configure** link. The Workflow Manager will open with the configured rules laid out for you.

You can make adjustments to the behavior of the workflow by clicking the links and reconfiguring them. You can also change the Conditions and Actions by adjusting the check marks in the checkboxes and clicking the links in the gray box to configure the new options.

Alternatively, you can completely alter the workflow by using the 'Choose a rule' drop-down list to select a new rule. The lower portion of page that contains the configurations of the workflow will be cleared out for the new workflow.

When you are finished, click the **Save Workflow** button to record the changes or click the **Go Back** link at the top right of the screen to return without saving.

Deleting a Workflow

Locate the workflow in the List view and click the Workflow ID or the magnifying glass to enter the Detail View. Click the Delete link on the form. The workflow will be marked for deletion and unavailable in the list views. See the Remove Deleted Records section on page 18 to permanently remove the workflow from the system.

Note: Remember, you have the option to disable a workflow from operating using the 'Active' field. Use this instead of the delete link to save yourself the time of re-entering workflows.

Last updated: January 9, 2008