Getting Started

Maintenance Coordinator v9 NET

ALPHA SIMPLICITY SOFTWARE TECHNOLOGIES LLC.

356 Torito Lane

Diamond Bar, CA 91765

www.simsofttech.com

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Introduction

The procedures presented herein assume that the purchaser of this product has basic computer skills and has used the Windows environment in the past. Many of the functions such as file open, file save, run option and the like can change depending on the operating environment the application is executed in. In such cases, please refer to the user's manual for that environment (supplied by that vendor).

Administrator Rights

Throughout the documentation we talk about logging into the system as a user with Admin or Administrator rights. These rights are setup with user accounts; please refer to the Security, Databases and Utility Modules chapter for more information on this subject.

> ***Please note that if password protection has not been turned on, all users effectively have Administrator rights.***

Installing the Application

Maintenance Coordinator can be supplied to you a few different ways. We send a link to download the software.

> ***IMPORTAND NOTE: If you already have a demo of the software installed, re-installation may not be required. Just activate the demo.***

To install Maintenance Coordinator onto your computer:

FROM DOWNLOAD

- Create a directory or folder on your local hard drive to download the file to.
- From the website, click on the appropriate download link to begin the download.
- Save the file to the directory you created above.
- Run the downloaded application to start the installation process.
- Follow on screen instructions.
- Click the Install Products option.
- Click on the option that best describes the application you want to install.
- Follow on screen instructions.

The Installation Process

The installation will follow these steps:

- The setup file will normally be titled MC8.exe. PM8.exe, or just plain setup.exe. **THE NUMBER 8 MAY CHANGE WITH THE VERSION OF THE RELEASE BEING INSTALLED.**
- If not already installed on your computer, the following two prerequisites will be installed from Microsoft:
  - Microsoft Net Framework (version may change).
  - Microsoft SQL Express Database engine (version may change).
- When the '**Install Welcome'** screen appears, click **NEXT** to continue.
- When the '**License Agreement'** screen appears:
  - Read the License Agreement.
  - Check the '**I accept the terms of the license agreement** 'radio button.
  - Click **Next.**
- When the **Customer Information** screen appears, enter your **Username** and **Organization** names in the spaces provided. Click the **Next** button.
- When the '**Ready to Install'** screen appears, click the **Install** button.
- When the '**Installation Completed'** screen appears, click the **Finish** button.

Installing for Network Use

Please note that a Network/Site License must have been purchased to use the routines outlined in this section. If such a license has not been purchased, then your databases must reside on the local **C:** drive.

To install the program for use on a network, please follow these steps:

- Install the program on each client computer as you would as if it was a single user setup (previous section).
- Activate the software on each computer it's installed to***. If not activated, network paths will not be allowed.***
- Copy the databases used by the program to a sharable network drive. These are the files with an .mdf file extension.
- Also copy the database's associated transaction log file. This file will have an extension of .ldf, and shares most of the same name as the database file it's associated with.
- Set up the database connections to use the copied databases.

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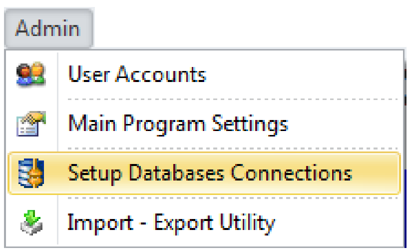
Setting up Database Connections (SQL Server Express Edition)

By default, the databases used by the **Maintenance Coordinator** system are installed to the **C:\Maintenance Coordinator NET** folder. It is highly recommended that you leave a set of these databases in this location. However, there are occasions when you want them to reside in other locations, such as on a network drive or share. When moving the databases, we recommend copying the databases to the new location.

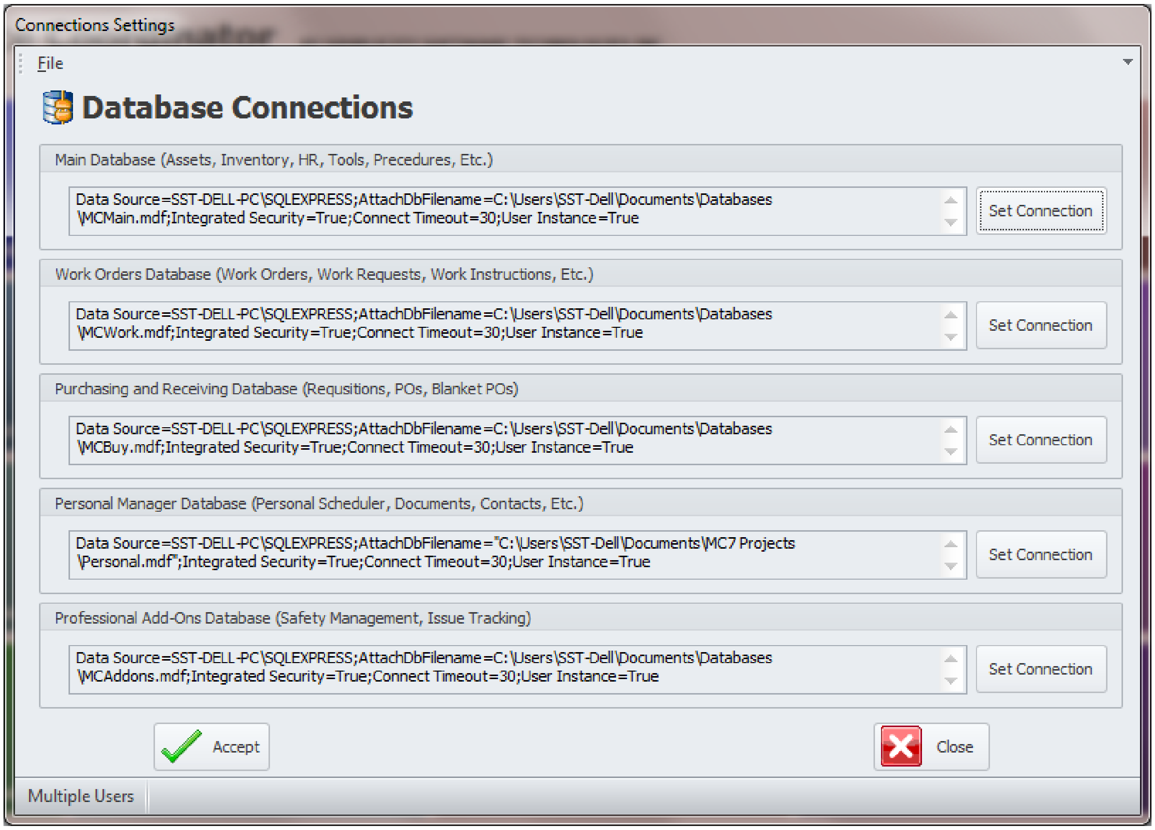
> ***Please note that a Network/Site License must have been purchased to network the databases.***

To setup your database connections:

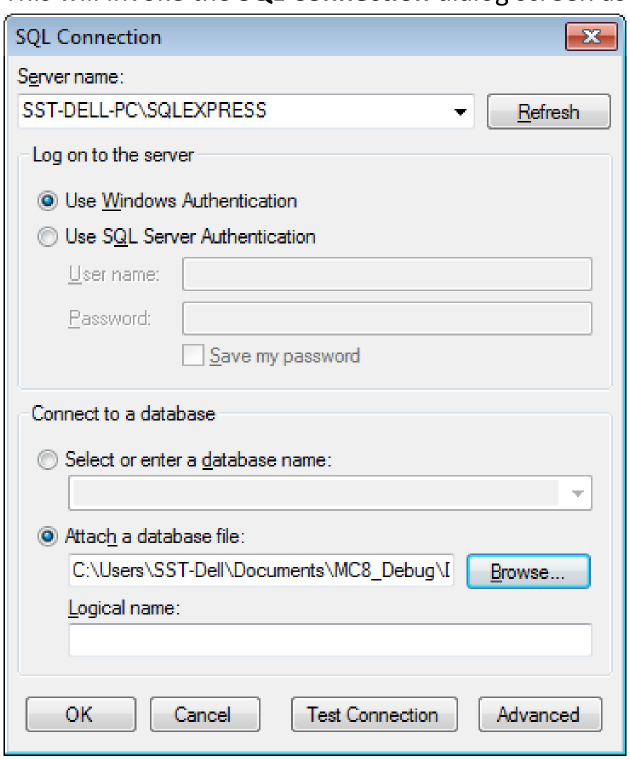
- Log in to the program as a user with administrator rights.
- From the main start menu, open the **Admin** drop down menu and select the **Setup Database Connections** option.



- From the invoked **Connections Settings** dialog, move to the **Main Database** group and click on the **Set Connection** button.



- This will invoke the **SQL Connection** dialog screen as shown in the following illustration:



- Move to the **Sever name** drop down box and select the name of your instance of the SQL server you're using. If the server is not listed, try clicking on the **Refresh** button.
- Move to the **Log on to the server** group and setup your log on authentication information.
    - **Using SQL Express** - If you are using the Express database engines as supplied by us, you'll probability want to check the **Use Windows Authentication** option.
    - **SQL Server** - If you are connecting to full blown SQL Server then complete the **SQL Server Authentication** information.
        - Check the **Use SQL Server Authentication** option.
- Fill in the **Username** and **Password** fields.
- Next move to the **Connect to a database** group to connect to the actual database.
    - **SQL Server**:
        - Check the **Select or enter a database name** option.
        - Move to the drop down found here and either select or enter the name of the database you are connecting to.
    - **SQL Express**: (Attached database file)
        - Check the **Attach a database file** option.
        - Either use the **Browse** button here to select the database file, or type in the full path to the database (mdf) file in the space provided.
- **Test Connection** – Move to and click on the **Test Connection** button to ensure you have a good connect. If it fails, you may want to click on the **Advanced** button to further define you connection properties.
- Click on the **OK** button.
- Repeat the above steps for the remaining databases that require setup.

Brief Description of the Databases

- **Main Database** - This database holds the main information or tables dealing with **Maintenance Coordinator**. Some of the included tables are HR (Employees), Inventory and Parts, Contacts and Vendors, Maintenance Documents, Main Programs settings and User Accounts.
- **Work Orders Database** – This database hold everything dealing with work orders and PMs. This also includes work instructions and time tracking information.
- **Purchasing and Receiving Database** – This database maintains information for Purchasing and Receiving support, purchase orders, purchase requisitions and blanket purchase orders.
- **Personal Manager Database** – This database maintains information on personal items. Personal Log, Personal Scheduler, Personal Contacts and Journal information.
- **Professional Add-Ons Database** – This database supports some of the add-on features and their data storage. Currently supported are Issues and Safety Management information.

Running the Program

Once the program has been successfully installed onto your computer, you can now begin using it by following the next instructions:

- Click the **Start** button for Windows XP or later.
- Click **SST** then the **Maintenance Coordinator** option to start the program.
  OR
- Click the **Maintenance Coordinator** icon on your desktop.

Activating or Validating the Software

The primary way the software is validated or activated is through email, the general procedure for this is as outlined next:

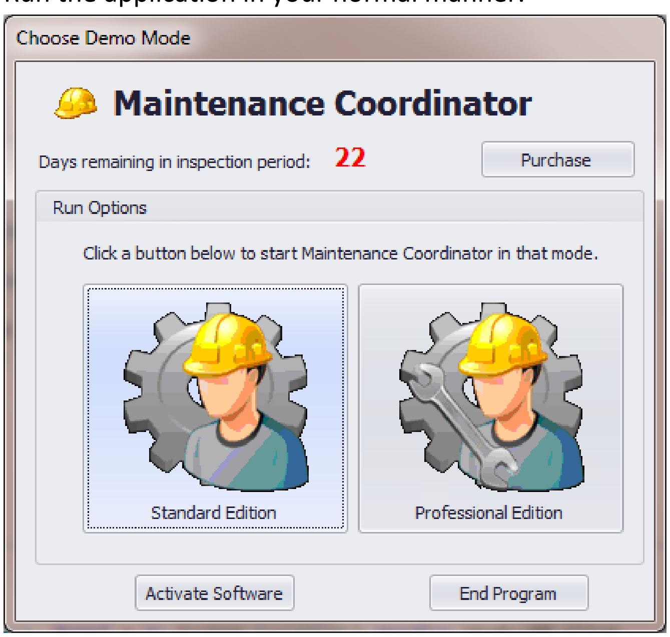
To activate the application from an email message (Outlook example):

1. Open the Email in **Microsoft Outlook**.
2. Open the **File** menu and select the **Save Attachments** option.
3. The **Save Attachment** dialog opens.
4. Browse to the following directory:
   Documents/Maintenance Coordinator
5. Click on the **Save** button, replacing any existing files.
6. Run the program and it should turn into a full working version.

Validating from Demo Mode

To unlock a demo version into a full working version please follow these steps:

- The application must first be purchased, and an activation file supplied by Simplicity Software Technologies Inc. The name of the activation file is: **MC_Act.lic**.
- Run the application in your normal manner.



- From the **Choose Demo Mode** screen, move to and click the **Activate Software** button.
- From this common **Open** file type dialog, browse to where you saved the activation file as supplied from Simplicity Software Technologies. The file name should be: **MC_Act.lic**
- Select the file and click **Open.**
- The program should now be a full working version.

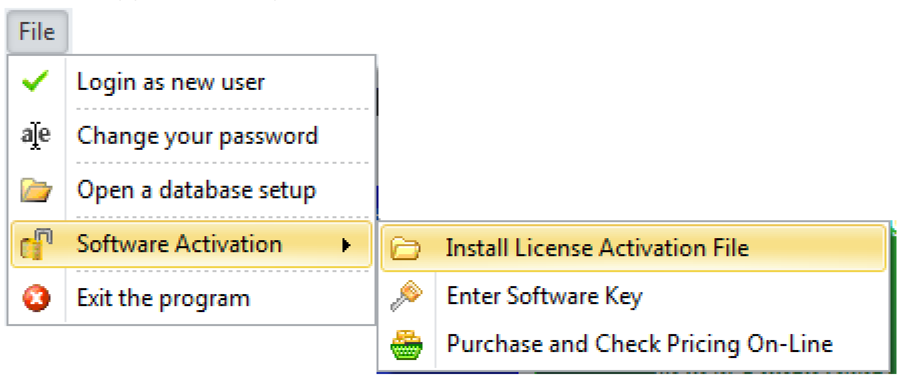
Validating from within the Application

To activate the software from within the application, please follow these steps:

> ***Note this procedure can also upgrade the application with newly purchased features.***

The application must first be purchased and an activation file supplied by Simplicity Software Technologies Inc. The name of the activation file is: **MC_Act.lic**.

- Run the application in your normal manner.



- Open the **File** menu and expand the **Software Activation** sub menu.
- Click on **Install License Activation File** option.
- From the common **Open** file type dialog, browse to where you saved the activation file as supplied from Simplicity Software Technologies. The file name should be: **MC_Act.lic**
- Select the file and click **Open.**
- Restart Maintenance Coordinator.
- The program should now be a full working version.

Activation Files

Please note that this activation file can be distributed to you through email or on other computer media. This file must be kept in a safe location and will be needed to activate the software on any computer or terminal it will be installed on. Feel free to make a single copy of this activation file for safeguarding.

> ***Be aware that sharing the Activation file with persons or organizations other that who it licensed to is strictly prohibited, and is in violation of federal and international copyright laws. Both parties could be prosecuted.***

IMPORTANT NOTE – Please note that validating the software is only part of the activating procedure. This step will only unlock a demo for a period of at least 45 days. To continue to use the software a **Software Key** must also be entered. Also note that the software will function without any limitations whatsoever within this 45-day period.

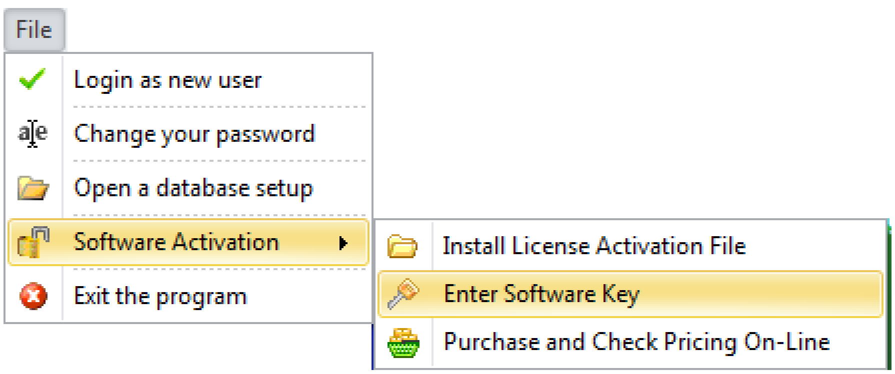
Entering a Software Key

Once the inspection period (30 day return policy) has expired and full payment has been secured by Simplicity Software Technologies Inc. you will be supplied a software key. Once the software key has been supplied, we recommend that you enter it immediately. If not entered within 45 days of the activation date, the software will lock you out.

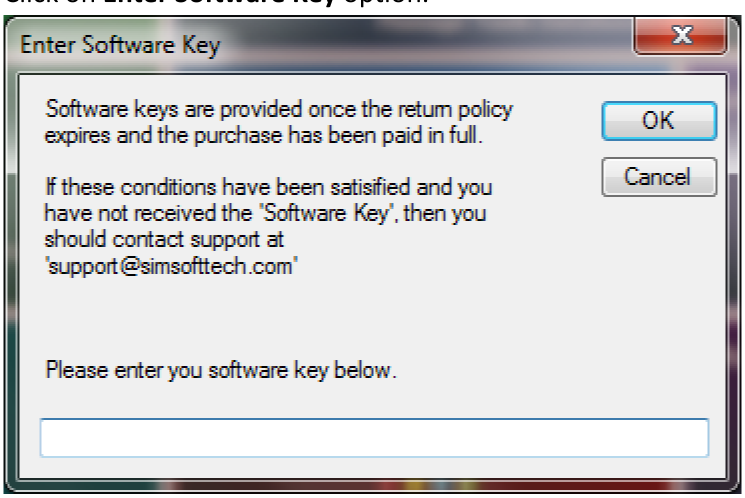
Also note that we normally use first class mail to deliver these software keys to you, so please be on the lookout for this letter.

To enter your software key:

- Run the application in your normal manner.



- Open the **File** menu and expand the **Software Activation** sub menu.
- Click on **Enter Software Key** option.



- Enter the key in the space provided and click **OK**.

Why Software Keys

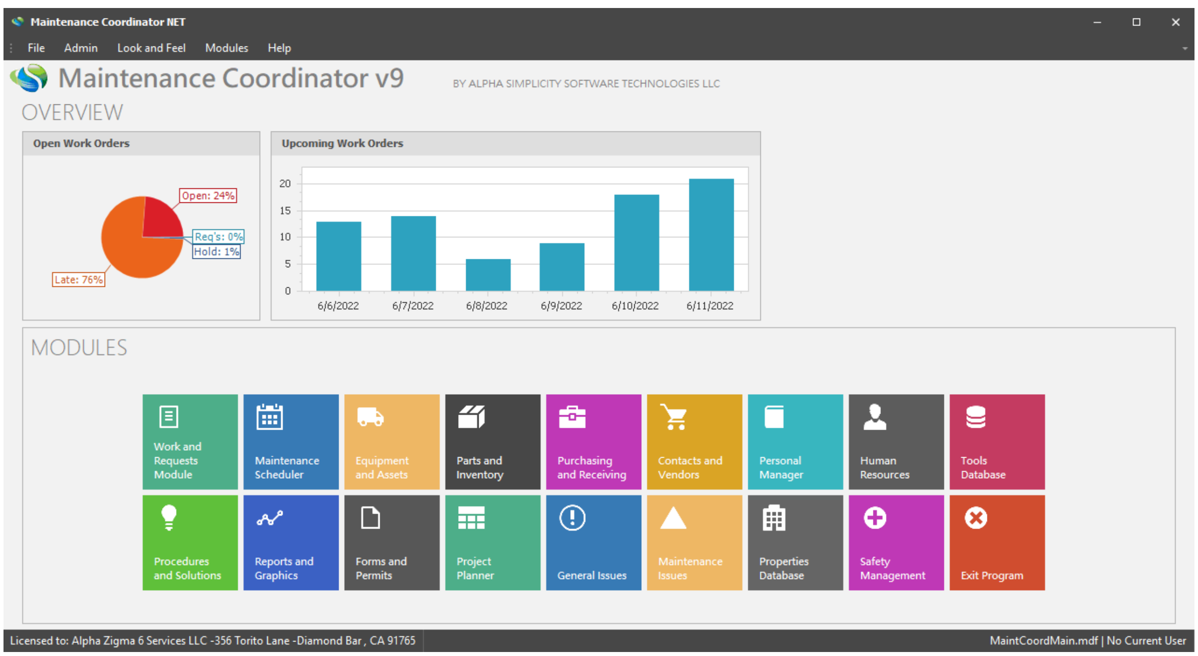
Software keys are our way of extending credit to our customers. When the software is waiting for a software key to be issued, it operates without limitation for a period of not less than 45 days. Most, if not all our software offerings carry a 30-days money back guarantee, and also have a net due with the same time period. Software keys allow us to honor both of these conditions.

INPORTANT NOTE: As with validating the software, the software key must also be used for each installation. Please keep the software key information and the activation file in a safe place.

Moving Between Modules

The Maintenance Coordinator program is arranged in modules, with each module providing its own functions and features. The modules are accessed mainly through the use of the program's Main Menu screen.

The following illustration is from the **Professional Edition**; your menu may be different depending on user rights and purchased modules.



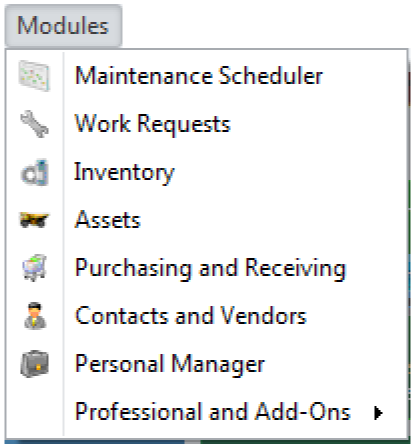
To navigate between program modules:

Option One

- Move to the main menu and click on a button that best describes the module you want to access.

Option Two

- From the main menu open the **Modules** menu and select the module of your choice.

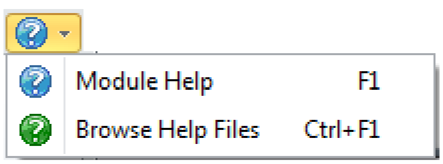


- If you purchased the **Professional Edition** or added modules, expanding the **Professional and Add-Ons** menu will provide you with more options.

Getting Instant Help

Most, if not all the modules in the system have **Help** documents associated with them. These are accessible from the **Help** drop down menus, normally located on a module main screen.

The following illustrates a typical help menu. These are also normally located on the right side of the ribbon control.



Pressing **F1** from a screen that help is available on, will pull up the main help file associated with the module you are currently working with.

Pressing **F2** will allow you browse and open any of the available help documents.

Main Program Settings

The **Program Setting** allows you setup general features that will be pretty much global to the application. Many of the individual modules in the system can also have other settings that pertain to that module only and in many cases maybe local the activate computer only.

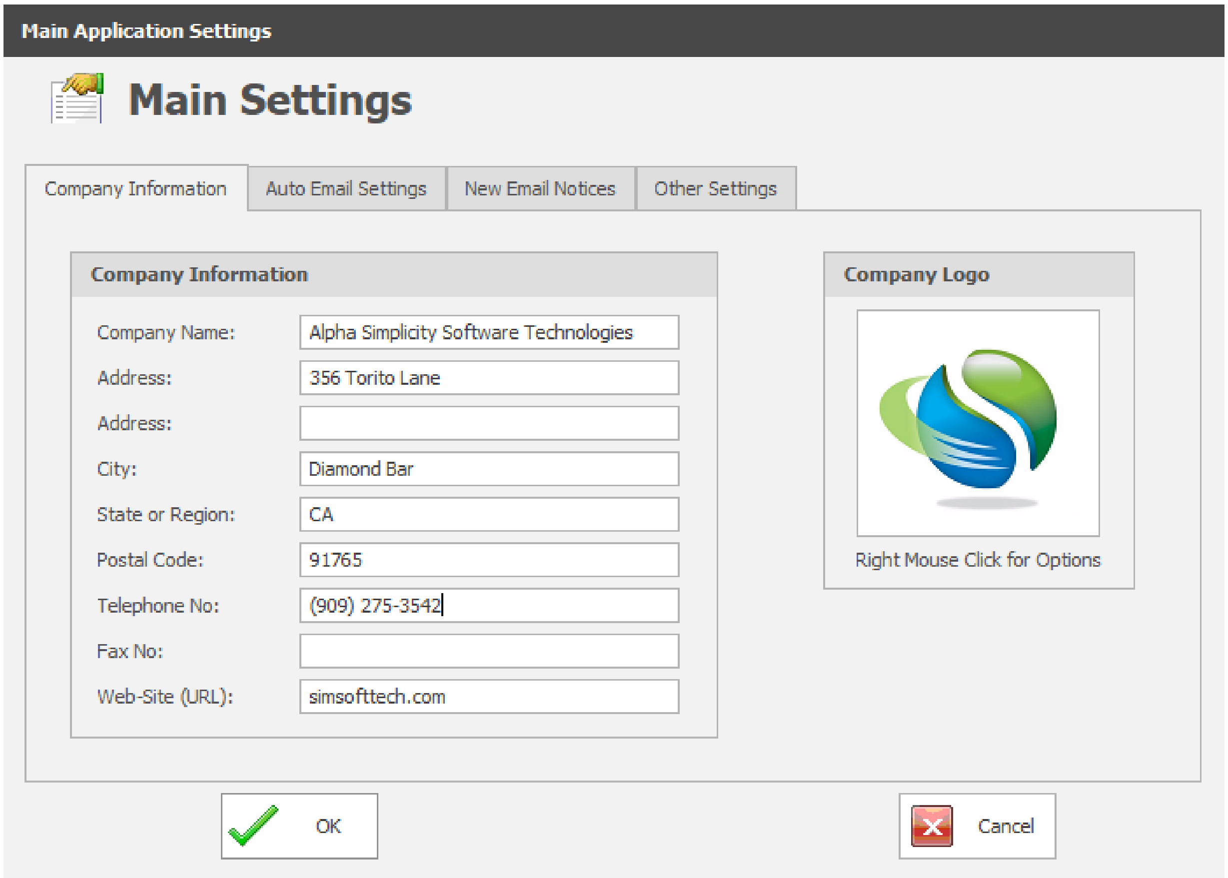
To configure the program settings:

- Login to program with Administrator rights.

- Move to the **Main Menu** screen of the program.
- Open the **Admin** drop down menu and select the **Main Program Settings** option.

Company Information and Logo

The information found on this tab can be used on various documents generated by the application.



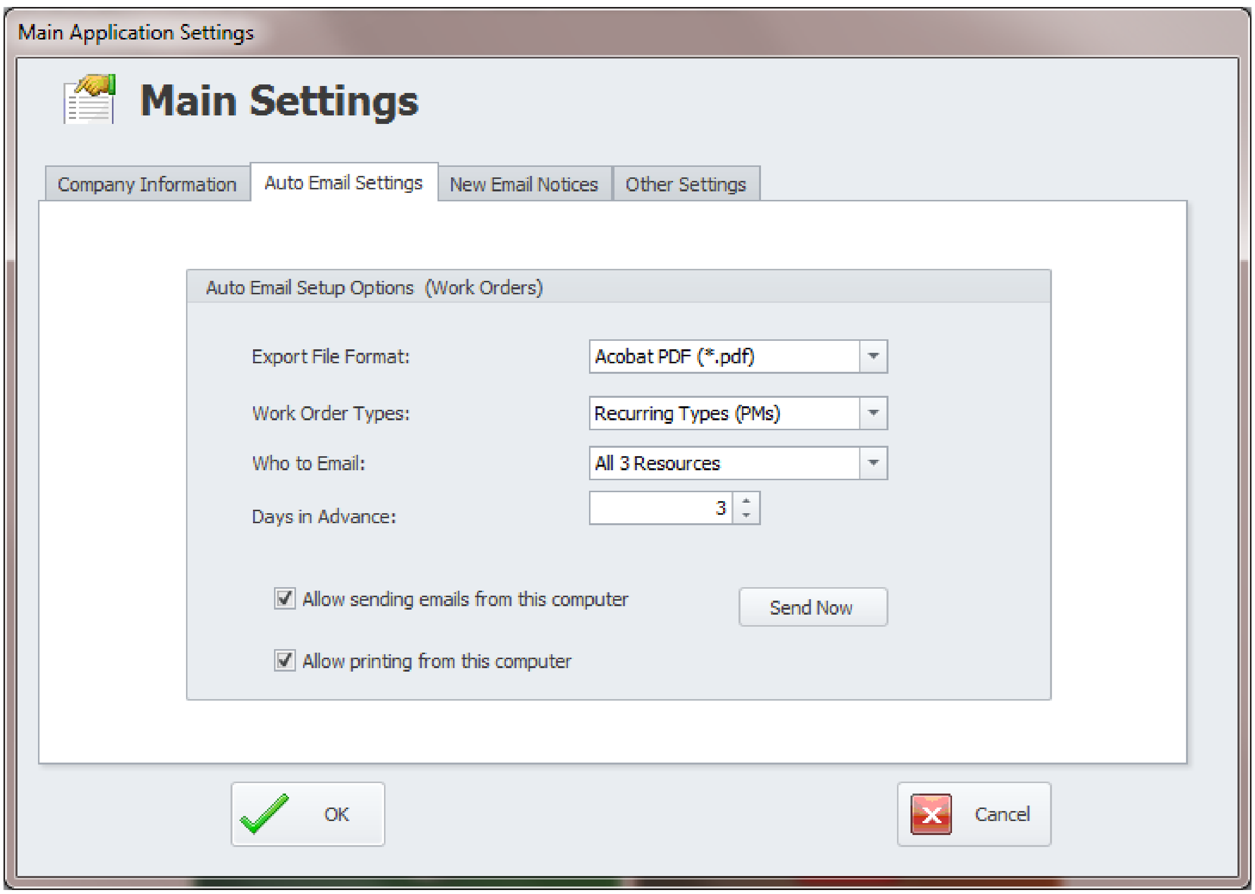
To setup your company information and logo:

- Move to the **Company Information** tab.
- Move through the various fields of this tab, and enter the appropriate information for each of the fields. The following explains the fields on this tab:
  - **Company Name** – This alpha/numeric field can contain up to 50 characters and is used to maintain your company's name.
  - **Address** – These two alpha/numeric fields can contain 50 characters each. Use these fields to record street and PO Box information.
  - **City** - This alpha/numeric field can contain up to 50 characters and is used to maintain the city your company is located in.
  - **State or Region -** This alpha/numeric field can contain up to 50 characters and is used to maintain the state or region your company is located in.

- **Postal Code -** This alpha/numeric field can contain up to 12 characters and is used to maintain your postal or zip code.
- **Telephone No** - This alpha/numeric field can contain up to 20 characters and is used to maintain your telephone number.
- **Fax No** - This alpha/numeric field can contain up to 20 characters and is used to maintain your fax number.
- **Web-Site** – There is no size limitation to this alpha/numeric field and is used to store company's web site or URL.
- **Company Logo** – This image should measure approximately 1 inch by 1 inch, and supports the following formats: bmp, gif, jpg, ico, png and tif.

Auto Email Settings

You have a few setup options with the **Auto Work Orders Email** feature. The automatic emailing of work order is performed from within the **Main Menu** module, and the program checks for new documents approximately every 5 minutes. As new items are found, the application will email responsible people copies of actual work orders.



The following are the elements found on this tab:

- **Export File Format** – This setting tells the program what file format to use when emailing work orders. It also specifies what action to take. The following are the options of the drop down.
    - **Acrobat PDF** – This option emails copies of work order in the PDF format.
    - **Rich Text Format RTF** – This options emails copies of work orders in the RTF format. These types of documents can be opened and edited in many word processors.
    - **Auto Print Only** – This option prints work orders directly to the default printer.
    - **Mail PDF and Print** – This option both email PDF documents and prints them to the default printer.
    - **Mail RTF and Print** – This option both email RTF documents and prints them to the default printer.
- **Work Order Types** – This option tells what type of work orders to process. The options here are:
    - **Recurring Types (PMS)**
    - **Standard Work Orders**
    - **All Work Order Types**
- **Who to Email** – This option allows you to specify which resource assignments to send email to. Options here include:
    - **Resource Assignment 1**
    - **Resource Assignments 1 and 2**
    - **All 3 Resources**
      Besides the email options setup here, the program can optionally email the other recipients as specified in the **Maintenance Scheduler** module.
    - **Days in Advance** – This setting specifies how many days in advance, as it relates to scheduled start dates, to send or print the work orders.
- **Allow sending emails from this computer** – Checking this option allows sending emails from this computer.
- **Allow printing from this computer** – Checking this option allows the printing of work orders from this computer.

Note that once the work orders are sent or printed from any computer, the Send flag is set preventing the process from repeating

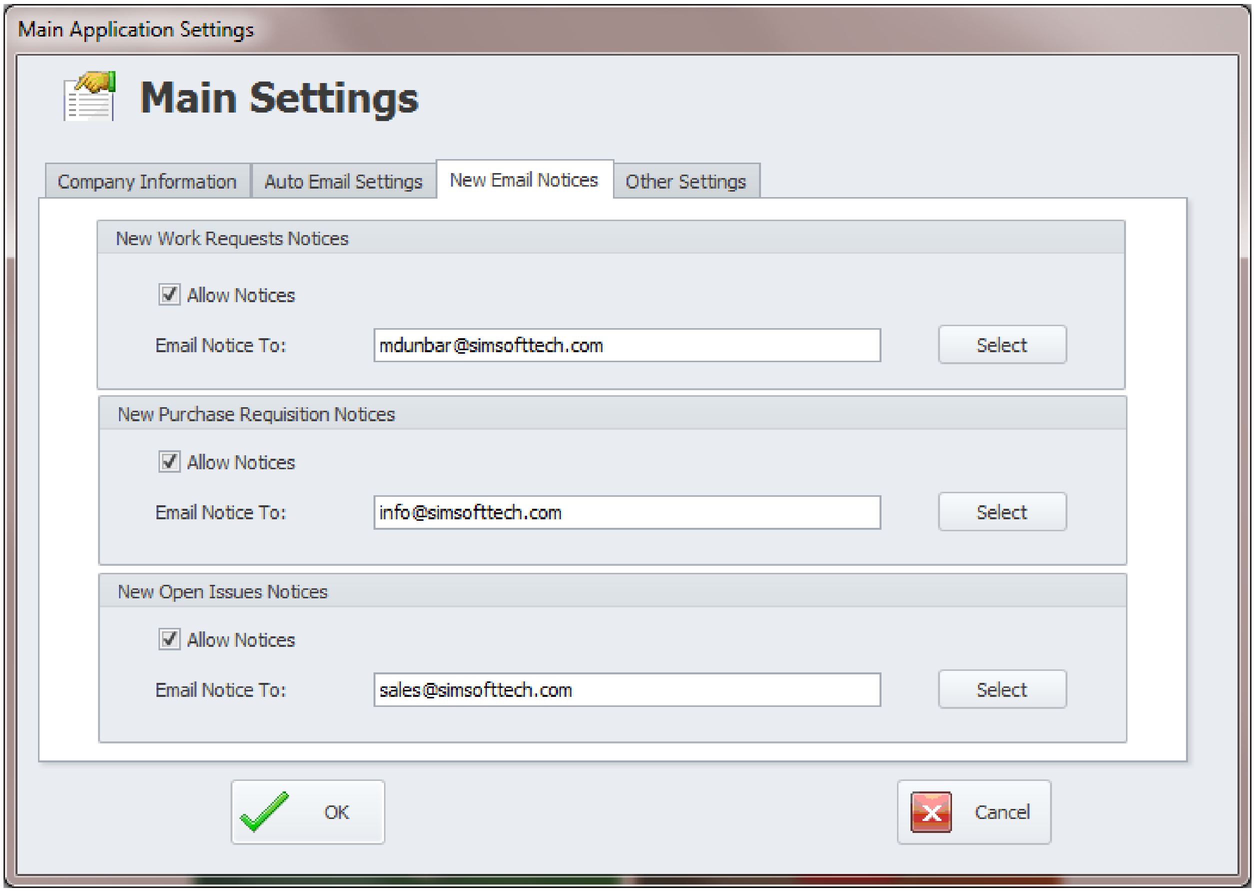
New Email Notices

When various items are created and entered **Maintenance Coordinator**, you can have the application send notices to the recipients of your choice about these new items.

Supported are notices for the entry of the following items:

- **New Work Requests Notices** – These notices will be sent when new work requests are entered in to the systems either manually, or through the use of the (optional) **Remote Service Requests** module.
- **New Purchase Requisition Notices** – These notices are sent when new Purchase Requisitions are found in the system.

- **New Open Issue Notices** – These notices are sent when new issues are found in the system, these issues have a status of Needs Attention, or Urgent issue, and they were created in either of the two issues modules. The Issues tracking feature is part of the **Maintenance Coordinator – Professional Edition**, or as an add-on to the **Standard Edition**.



To setup who receives email notices about new document creation:

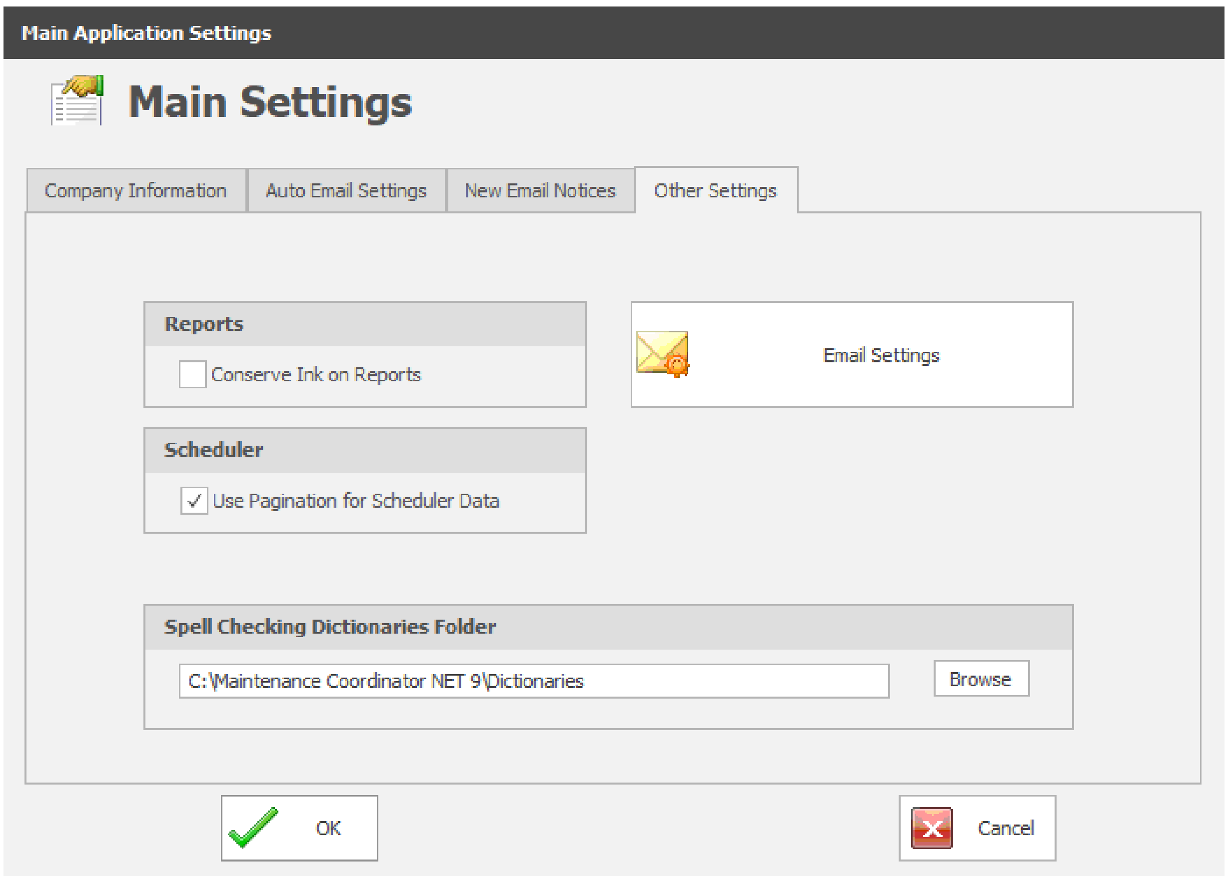
- Move to the group you want to setup the recipient(s) on.
- Check the **Allow Notices** check box.
- Move to and click on the **Select** button.
- From the invoked **Mail Recipients** dialog, select and add the recipient or recipients you want to send email notices to.
- Click on the **Select** button.
- Repeat for each available group on this tab.

The system will be checked in the same time frame as the **Auto Email Feature**. Also note that multiple recipients are separated by a semi-colon (;), and you can type in these recipients in place of selecting them from the **Mail Recipients** lookup.

Other Settings

On the **Other Settings** tab of the **Main Application Settings** dialog, you have the following options:

- **Conserve Ink on Reports** – When checked, the application will try to remove some of the ink usage on some of the built-in reports
- **Email Settings** – This allows you to setup the internal email feature for use with the built in **Email Composer**, and for the auto email features. This will be outlined in the next section.
- **Scheduler Use Pagination For Scheduled Data-** Sets 2 different modes of displaying data in the Maintenance Scheduler Look Up Grid if it is not selected all open task will be displayed, depending on the amount the system will take some time to open and regenerate work orders. If checked the system will bring 150 work orders at the time thus decreasing the time in which the app opens, and regenerates work orders



- **Database Connections** – This allows you to setup your database connections as outlined earlier in this chapter.

Email Settings

If you plan on using any of the built-in email features, then you will need to setup your internal email settings. The email component we used supports non-secured email connection, SSL connections and TLS connections. These settings allow use with a variety of mail servers, including, but not limited to free Gmail accounts.

To access **Email Settings** from the **Main Menu**:

- Login to program with Administrator rights.
- Move to the **Main Menu** screen of the program.
- Open the **Admin** drop down menu and select the **Main Program Settings** option.
- Move to the **Other Settings** tab and click on the **Email Setting** button.

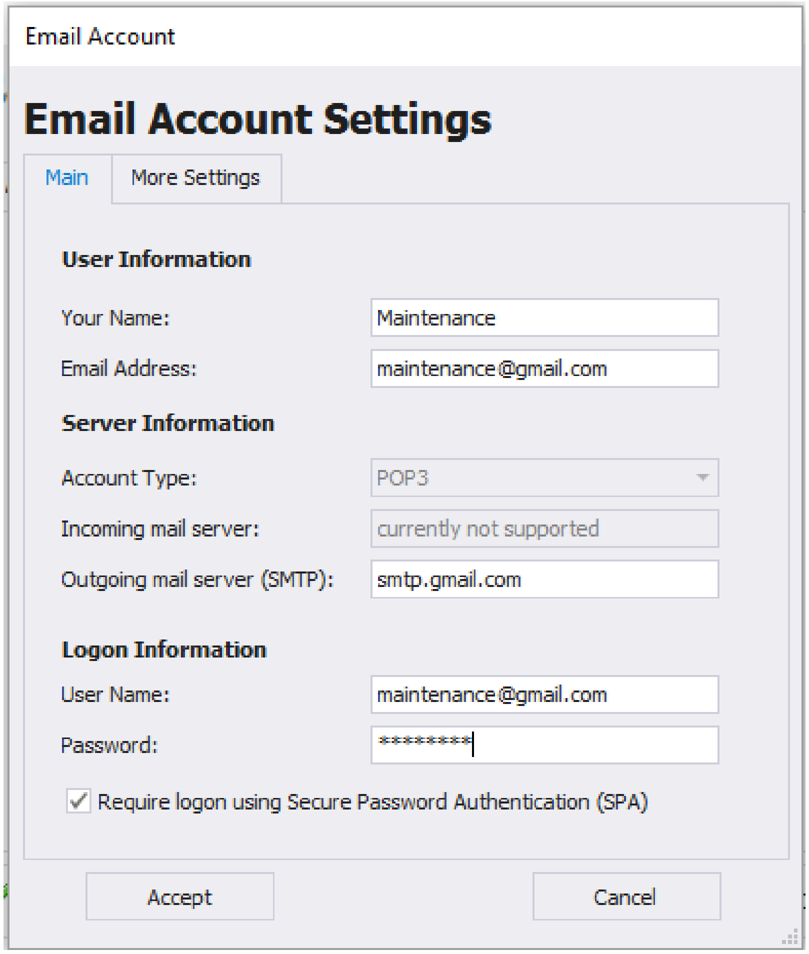
To access Email Settings from the **Email Composer**:

- Open the **File** menu.
- Click the **Email Settings** option.

Main

This tab allows you to setup User information, Server Information and Login Information.

The following image illustrates the elements of this tab:



User Information

- **Your Name** – The name of the person, department, or other identifier of the email sender
- **Email Address** – This field is used to identify the email address of the sender.

Server Information

- **Account Type** – Currently not supported. Future use to specify POP3 or IMAP mail accounts.
- **Incoming Mail –** Currently not supported. Future use to specify the Incoming mail server.
- **Outgoing Mail Server (SMTP)** – This is the SMTP server name the account is setup to use.

Login Information

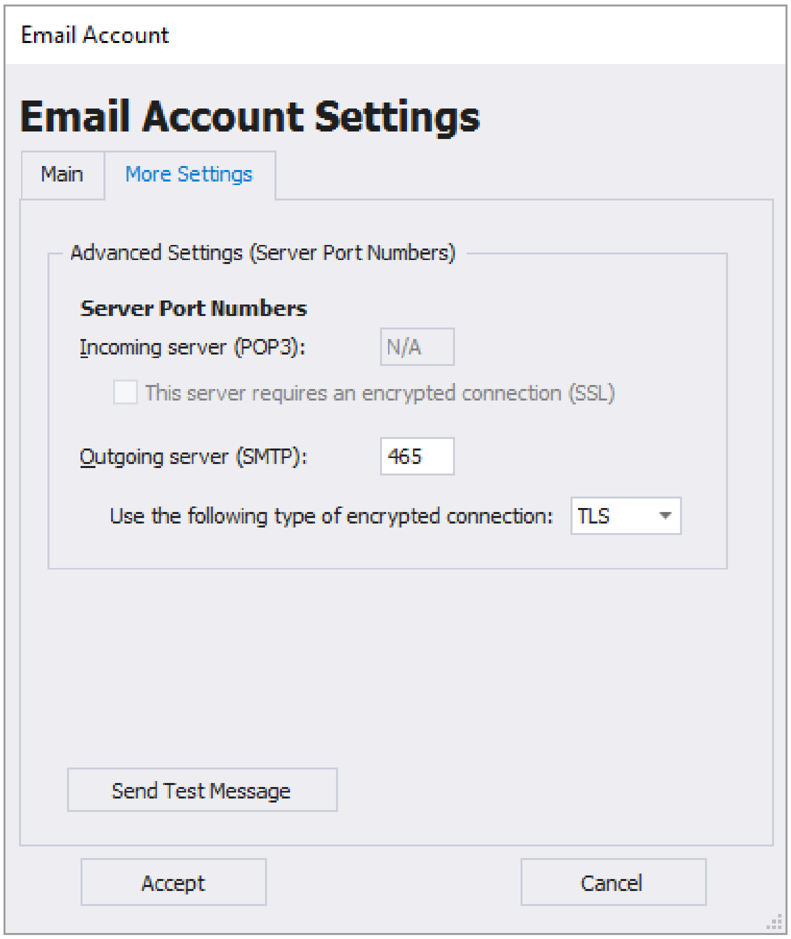
- **Username** – This is the username of email account that will be connecting to.
- **Password** – This the password that will be used to login to the account.

Require login using Secure Password Authentication (SPA)

If the mail server being logged in to requires 'Secure Password Authentication' then this should be checked. When not sure, we recommend checking this box. If this is not used, most mail servers will allow sending to local recipients only.

More Settings

The settings on this tab allows you to specify server port numbers to use and security or encryption information.



Advanced Settings – Server Port Numbers

- **Incoming server (POP3)** – Currently not supported. Future use will be to specify the incoming mail, POP3 port number
- **This server requires an encrypted connection (SSL)** – Currently not supported.
- **Outgoing Mail Server Port** – This setting specifies the outgoing mail server port. Common configuration and the type of connection normally use are as follows:
    - **25 (Regular Connection)**
    - **465 (SSL Port Connection)**

   - **587 (Start TLS Connection)**
- **Use the following type of encrypted connection.**
   - **None** - No authentication. Sometimes used with Smtp when the server allows relay for anonymous senders.
   - **SSL** – SSL will be used to authenticate the client and encrypt the data.
   - **TLS** – TLS will be used to authenticate the client and encrypt the data.
   - **Auto** - The most secure protocol supported by the server will be used to authenticate the client and encrypt the data. If the server supports TLS, this protocol will be used; otherwise, less secure protocols such as SSL will be tried. However, some servers require the client to specify the protocol and do not support automatic protocol negotiation.
- **Send Test Message** – Clicking this button sends an email message using current settings to the email address as specified under **User Information** section.

How to Get Started with Maintenance Coordinator

With Maintenance Coordinator we have tried to make it possible to enter things as needed. This to say, if you need to add a mechanic to a work order, you can add the mechanic to the database at the time the work order is created. Most of our lookup screens allow you to add new items as you are selecting them. This approach allows you to get started using the program almost immediately.

The first thing you need to setup is your databases. Everything you enter the program will be saved to these databases. Please refer to the Security and Databases chapter for more information on how to do this. Creating new databases is as simple as opening and saving files. Once these new databases are created, be sure to point to them.

The next area to explore and setup are the program's general settings. This is found using the Admin drop down menu and selecting the Program Settings option. This is accessible from the main menu of the application. Here you setup company information, your company logo, your e-mail server, database paths, and other general information. The most important of these is setting up your databases. You can always configure the other setting later on if needed.

Work Orders need the following items available for their creation:

- Mechanics or employees responsible for their completion.
- Equipment the work order will be assigned to.
- Materials or spare parts that will be needed to complete the work order.
- Safety Instructions.
- The actual work instructions.

The items in the above list should be available for the creation of work orders. Equipment information is perhaps the most important of these items and you should work on this list first. Gather information such as descriptions, serial, model, and reference numbers. More information can always be added later as needed.

Also dealing with the equipment, you also want to gather any special safety instructions along with recommended planned maintenance instructions. This information is usually available from the equipment vendor or manufacturer. If you can obtain this information in electronic form, it would be an added plus as you should then be able to just copy and paste this information into the program (a great time-saver).

The next thing you need to do is build your database of task instructions. This is necessary for planned maintenance tasks only, as you can and should reuse the same set of instructions over and over. For example, say you have five air compressors in your facility it would only make sense to reuse the same set of instructions for all five air compressors.

Once you have built your database of task instructions, you should do the same thing with your safety instructions. Unlike task instructions, safety instructions should be assigned to each and every work order regardless of whether it’s a planned maintenance or repair type.

Basically, with the above completed, you are ready to start using the program for the creation of both planned maintenance and repair types of work orders. Please keep in mind that these have only been basic recommendations to get you up and running quickly, there are many more features you need to consider while using this powerful and feature rich CMMS application.

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