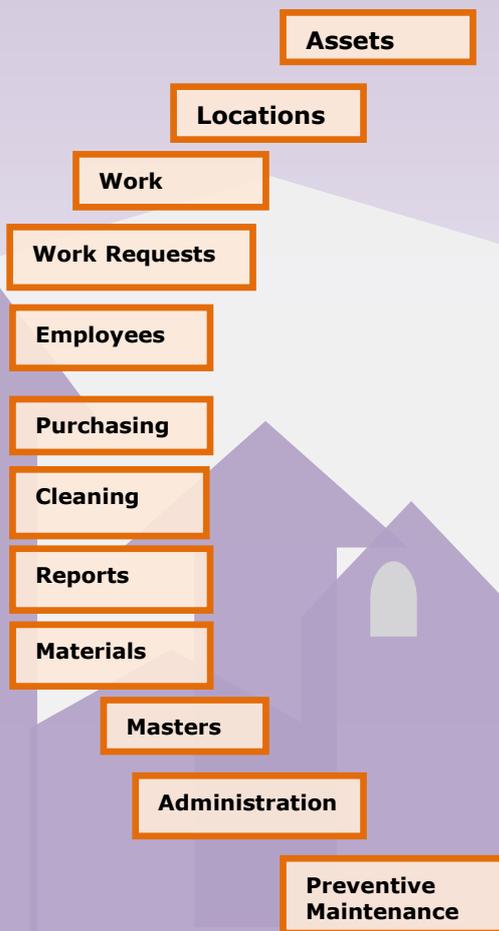


CWorks EASY / User Guide

Computerized Maintenance Management Systems

PHP Version
Updated Jun 20, 2012
Released 001



CWORKS SYSTEMS BERHAD

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CWORKS

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1. GETTING STARTED WITH EASY

CWorks EASY is a feature-rich, web-based Computerized Maintenance Management System (CMMS) that offers cost effective core functionalities and flexibility aim for maintenance of assets, facilities, buildings, plants, factories, etc. A few of the features are listed below:

- Management and registration of one master library of static information such as monetary unit of currencies, parameters, failure codes, locations, sites, suppliers and more
- Access to asset maintenance history and more
- Setting up condition and meter-based preventive maintenance schedules
- Management of spares purchasing, ordering, tracking and site-to-site transfer
- On-line form for sending work request for maintenance and reporting breakdowns
- Management and tracking of Work orders progress that depended on fulfilment of purchase requests and purchase orders of spare parts
- Manage employees
- Comprehensive Maintenance Reports and more

The benefits it brings to maintenance are:

- ✓ organization, quality and control to facilities management
- ✓ Access via internet 24/7 from anywhere in the world to your maintenance information
- ✓ instant daily summaries at-a-glance on maintenance back log, in-progress status and activities
- ✓ reduce most non-value added maintenance activities
- ✓ tracks suppliers and contractors used by maintenance services
- ✓ access to preventive maintenance schedules of any assets or equipment
- ✓ control generation of preventive maintenance work orders
- ✓ control company's list of maintainable assets through asset register
- ✓ schedule planned preventive maintenance routines (time-based schedules, metered/condition based schedules)
- ✓ control preventive maintenance procedures and documentation
- ✓ control and document all planned and unplanned maintenance work
- ✓ provide maintenance budgeting and costing statistics
- ✓ monitor usage of man-hours in maintenance
- ✓ control maintenance spares inventory (store's management, store items, requisition and purchasing)
- ✓ process condition monitoring inputs (meter readings, mileage, number of runs)
- ✓ schedule calibration for plant machinery and instruments
- ✓ Provide analysis tools for maintenance performance

1.1 Intended Audience

This user manual is suitable for the following audience:

- Managers and Professionals in Hotels, Stadiums, Facilities Management, Assets Management, Plant maintenance, manufacturing, public amenities services and repairs, etc
- Maintenance and Service Professionals – Managers, Engineers and technicians
- Maintenance Professionals and Personnel who have attended CWorks Systems training
- Facility Owners, Business Managers, consultants and contractors in maintenance industry or interested in maintenance

1.2 CWorks EASY System Requirements

1. Access to internet

2. A legally purchased copy of **CWorks EASY**

You can host a copy of EASY on your own private server. Alternatively, we can host your copy of EASY on our secured server (call our sales and ask about this option).

3. **PC, laptop**

Running Windows XP, VISTA, 2000/3 with sufficient speed, RAM and display. Set PC resolution to 1024 x 768 pixels or higher.

4. **Internet Explorer 8 and higher**

We recommend installing Internet Explorer and set it to **compatibility mode** for best performance.

5. **IE browser Java Script option must be set to ON**

CWorks EASY requires Javascript option to be set to ON.

6. **Support for other browsers**

This CMMS supports Google Chrome, Mozilla Firefox and Internet Explorer (8 and higher).

However, Opera, Safari, etc. are not supported.

1.3 Website, Resources, Updates, User Forums and more

CWorks website is at www.cworks.com.my.

Visit our website for full product range and services, contacting us, offices, FAQ, articles, updates, resources, etc.

1.4 Basic Data Preparation

Data preparation is about collecting information pertaining to maintenance operation, assets and equipment at a facilities or plant that hardly changes with times. Such information includes site names, location names, work trades, local currency exchange rates, equipment failure terms, working constants like total work hours per day and assumed total days in a month, and more. This information rarely changes with times, during the lifespan of a facility under maintenance. For this reason, such information is stored in the **Master library**.

To get some ideas, visit the **Master screen** of **CWorks EASY** where such information are stored under several tabs – each holds a specific information. On the whole, the **Master** is a kind of central data bank.

Note

You may need help at this stage of data preparation but this is normal when looking at the bewildering amount of information available at a facility or site to maintain. This is where our support team will be able to assist you with this complex task (subject to the terms and conditions of your agreements with CWorks Systems).

1.5 Some Guidelines, Conventions, Dos and Don'ts

CWorks EASY uses **relational database** for storing information. That means the designers organize the information in the database into tables that are related by some relationships. However, you do not need to know anything to use **CWorks EASY**. Suffice to say that a database consists of many related tables.

In a database table, there may be one or more designated key fields (Primary keys and foreign keys) that determined the uniqueness of the information stored at this field. Crucially, these key fields establish the relationships of the data between the tables, as envisaged by the database designers. Some named examples of **key fields** are Site Name, Employee Number, Work Request Number, Work Order Number, Asset Number, purchase order Number, Task Number, Part No, Location Number and many more.

For best practice, we recommend the following **conventions** below:

- Use alphanumeric characters, space, underscore(_) and hyphen(-) for assets, site names, descriptions, etc
- Avoid **spaces** in numbers and unique codes
- Avoid **special reserved characters** in names

: / ! \ < > . , ; ' " @ # ^ * () ,

Reserved characters have special meaning. Computers interpret these as command or instruction to do something.

- Keep the same data length (number of characters) in key fields as it will affect the aesthetic appearance of printed reports and data display.
- When using a series of **consecutive numbers** for some input, start these numbers at 100, 1000 or 10,000 rather than 1, 2, 3. In this way, it is easier to spot invalid numbers quickly.
- Unless you have a well establish numbering system that works very well in most situations, we recommend that you do not attach too much logic and meanings to the numbers themselves. An **example** of such Code is – **B0100208** where it has the following interpretation: Bin B01, color index 002, located at storeroom 08.
- Be consistent in the use of **Capital letters, leading capitals** and **lower case letters**. For instance, you can use all capital letters in Key fields, leading capital letters in descriptions, and keep the body of the description in lower case. If you are trying to sell to higher management, presentation is important

1.6 CWorks EASY Opening Screen or the Dashboard

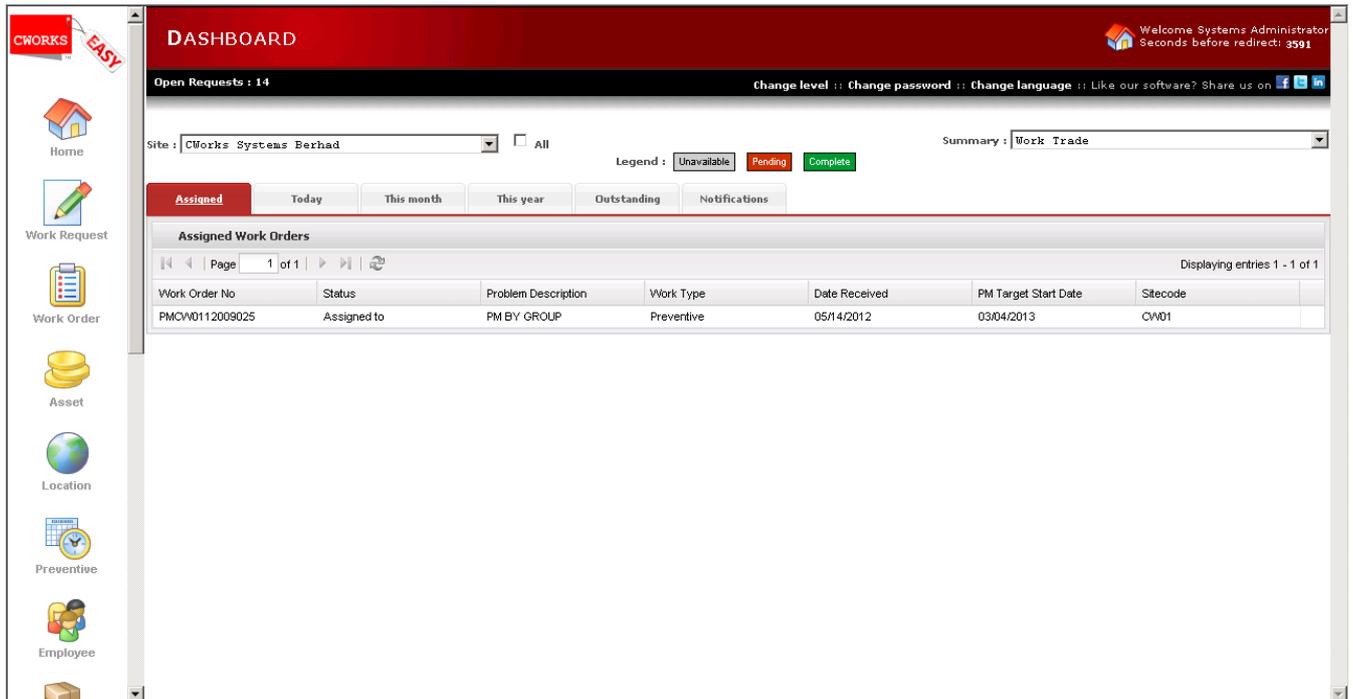


Figure 1: CWorks EASY Opening Screen – Showing the DASHBOARD

Figure 1 above shows the opening screen that appears after login. It is called the DASHBOARD because various maintenance summary reports are presented to the user on this screen.

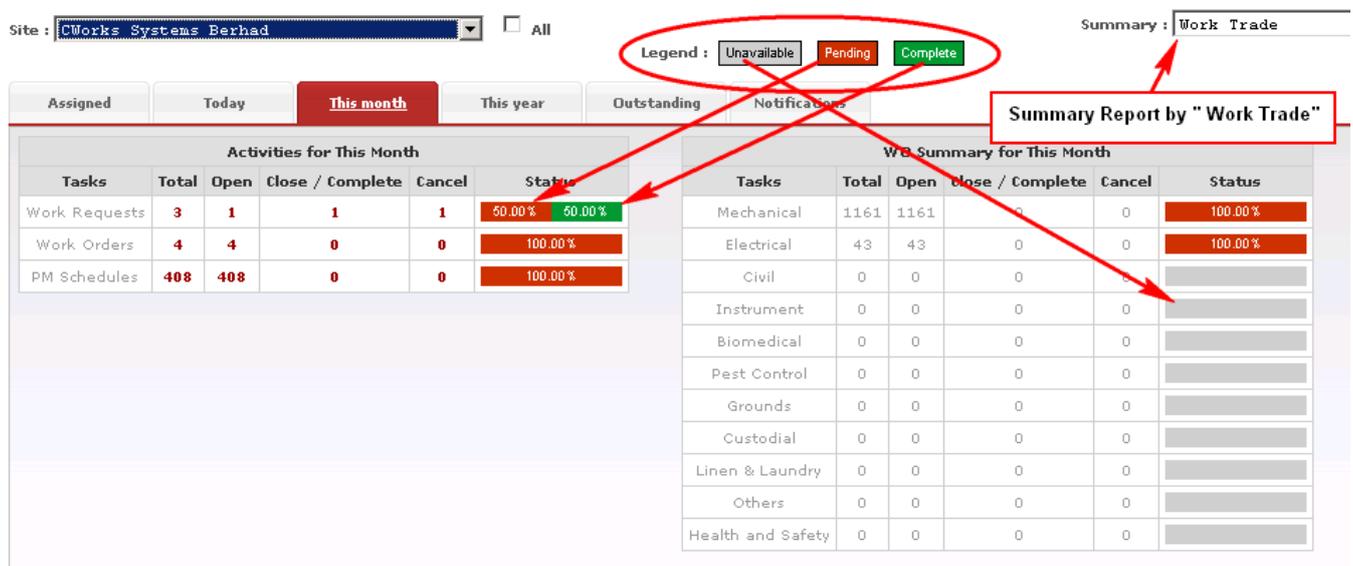


Figure 2: Legends and their meanings

For convenience, the **Summary Reports** are broken down into periods — “**Today**”, “**This Month**” and “**This Year**”. Click on the appropriate tab as shown in **Figure 2** above to access the period you want. Further, the summary reports can be view either by **Work Trade** or **Work Type**. The current type is displayed by the **Summary Type Selector** as shown in **Figure 3** below. Click the **Summary Type Selector** to select another type.



Figure 3: Summary Type Selector

An important point here is to make sure that you are looking at the summary reports for the **correct site**. The current **site name** is displayed on the **site selector** as shown in **Figure 4** below. If it is not, click the **site selector** to change it.



Figure 4: Site Selector

Note

The **current site selector** is a **drop-down list** with the **names of all the sites** accessible by the user. One of the administrator’s responsibilities include setting up a list of sites accessible by a user. The CMMS will display only those sites accessible by the user. Any other sites are hidden by **CWorks EASY**.



Figure 5: Multi-Tab Dashboard Summary Reports

Arranged in multiple tabs, as in **Figure 5** above, you can access each report simply by clicking on

its tab. In addition, you can view the reports either by **Work Trade** or **by Work Type**, which you can select using **Summary type** drop-down list as shown below.



Figure 6: Viewing Choices by Summary Type

1.6.1 CWorks EASY Top-Level Menu Icons



Figure 7: CWorks EASY Top-Level Menu

Figure 7 above shows **CWorks EASY Top-Level Menu icons** in two columns, however, in reality they are in a single column, situated on the left hand side of the CWorks EASY opening screen. It is always in view for easy access to the user. However, you may need to scroll a little to get to some of the menu icons.

For convenience, we will refer to this menu simply as the CWorks EASY Menu.

1.7 How to Login to CWorks EASY CMMS

Open Internet Explorer (Version 6 and above), type your CWorks EASY internet address into the address box (this url address is unique and specific to each customers). Within a few seconds, you should see the CWorks EASY login dialogue as shown below.

**Figure 8: Login Screen**

To login, follow the steps below:

1. Enter **UserID** and **Password** into **Username** and **Password** fields respectively.

2. Click **“Login”** button.
3. Your login is successful, if you see the CWorks EASY opening screen.

Note: Just under the top right hand corner, you will see the **welcome message** and username, as shown below.



Figure 9: Welcome Message after logging

2. WORK REQUESTS



ACCESSING THE WORK REQUEST

You can access the **Work Request** on **CWorks EASY opening screen** by clicking the **icon** on the left, which will open the **Work Request Opening Screen**.

The **Work Request module** allows anyone to raise service requests, report faults and problems to maintenance department, after a little training. Essentially, it allows the responsibility of reporting to be shifted to personnel who has been adequately trained, thus freeing maintenance personnel to focus their time and efforts more on demanding activities. With proper control in place, maintenance team can quickly process and discounted any false work requests, etc. The remainder can go through normal processing and finish off with appropriate work orders. The diagram below shows a generic work request and work order processing flow chart.

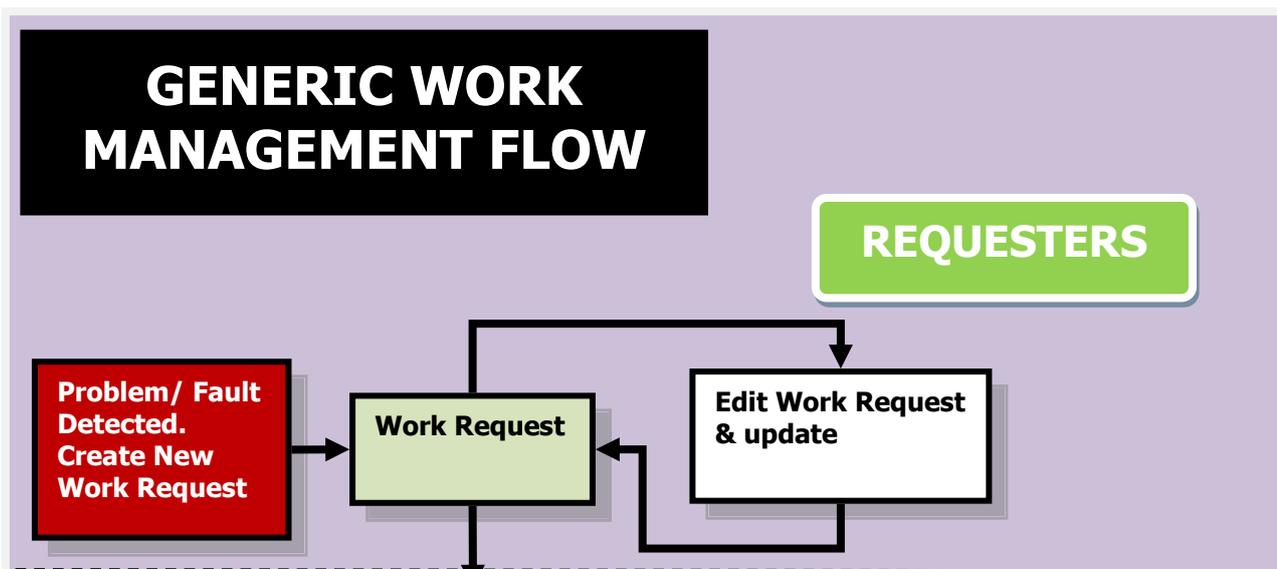


Figure 10: Work Management System Processes and Information Flow

2.1 Work Request Opening Screen

Figure 11 below shows the **WORK REQUEST opening screen**. Every time you go to this screen, it automatically lists all your **Work Requests**, if they are **active**. To help you locate any work order, there is a fully featured **Work Request search** facility.

WORK REQUEST LIST Open Requests : 7 Welcome Admin
Seconds before redirect: 000
[Change Level](#)

[List](#) [New](#)
Work Requests Work Requests

Site : **ENGINEERING**

| Work Request No. | Work Order No. | Problem Description | Req. Status | Work Status | Received Date |
|--------------------|----------------|-------------------------------|-------------|-------------|-------------------------|
| RENG1000045 | ENG1000037 | asd | WO Raised | Open | 23 November 2010 18:33 |
| RENG1000044 | | mytl | Open | | 12 November 2010 22:18 |
| RENG1000042 | ENG1000055 | dld fevcc fviv fvdefef fásda | WO Raised | Open | 22 October 2010 15:14 |
| RENG1000040 | ENG1000046 | Aduan Baru | WO Raised | Open | 21 September 2010 15:39 |
| RENG1000039 | ENG1000048 | zids-dod-dcdc | WO Raised | Open | 22 September 2010 15:35 |
| RENG1000035 | ENG1000043 | rtt | WO Raised | Open | 20 September 2010 17:09 |
| RENG1000034 | ENG1000049 | try | WO Raised | Open | 20 September 2010 17:01 |
| RENG1000031 | ENG1000052 | test 21 asdfasf asdfasdfas sa | WO Raised | Open | 20 September 2010 16:21 |
| RENG1000029 | ENG1000042 | Testing Profile 5. | WO Raised | Open | 19 September 2010 16:43 |
| RENG1000028 | ENG1000001 | Test Profile R1 | WO Raised | Assigned | 17 September 2010 15:22 |

Record(s) : 24 Page 1 of 3 [First](#) [Previous](#) [Next](#) [Last](#)

Work Request Search Facility [Export to Excel](#) [Reset](#) [Search](#)

Search Criteria

Work Request No. [Clear](#)

Work Order No. [Clear](#)

Description

Work Request Status [Clear](#)

Work Order Status [Clear](#)

Mechanical

Figure 11: Work Request Opening Screen

2.2 How to Open New Work Request



Briefly, this function allows you to go to **Work Request Opening screen**, where you can select **new work request** icon above to create a new **Work Request**.

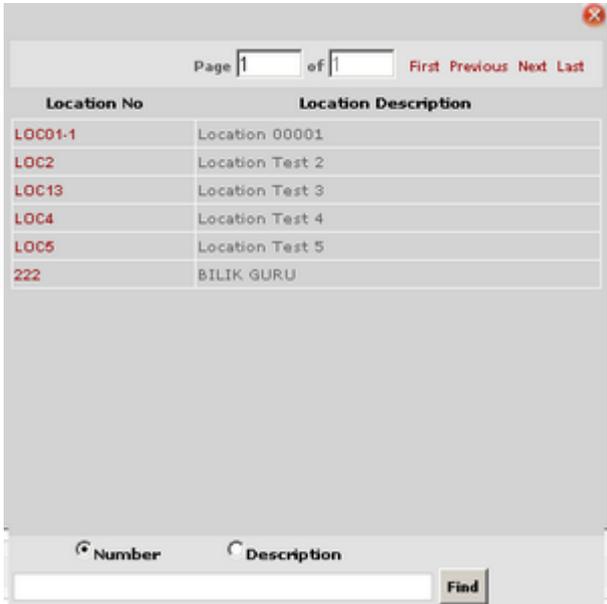
 A screenshot of a web application interface for creating a new work request. The header is dark red with the text "NEW WORK REQUEST" on the left, "Open Requests : 7" in the center, and a user welcome message "Welcome Admin" on the right. Below the header, there are two icons: "List Work Requests" and "New Work Requests". The main content area is titled "Site : ENGINEERING" and has a "General" tab selected. The form includes fields for "Received Date / Time" (25 November 2010 17:17), "Problem Description" (a large text area), "Work Type" (Corrective), "Work Trade" (Mechanical), and "Work Priority" (Normal). The "Requester Information" section shows "Name" (E001 - Admin), "Department" (0000002 - Test Depart1), and "Contact Number" (0998989899). The "Location / Asset Information" section has radio buttons for "Location Number / Asset Number unavailable", "Location", and "Asset", with corresponding input fields and buttons. A "Save" button is located at the top right of the form area.

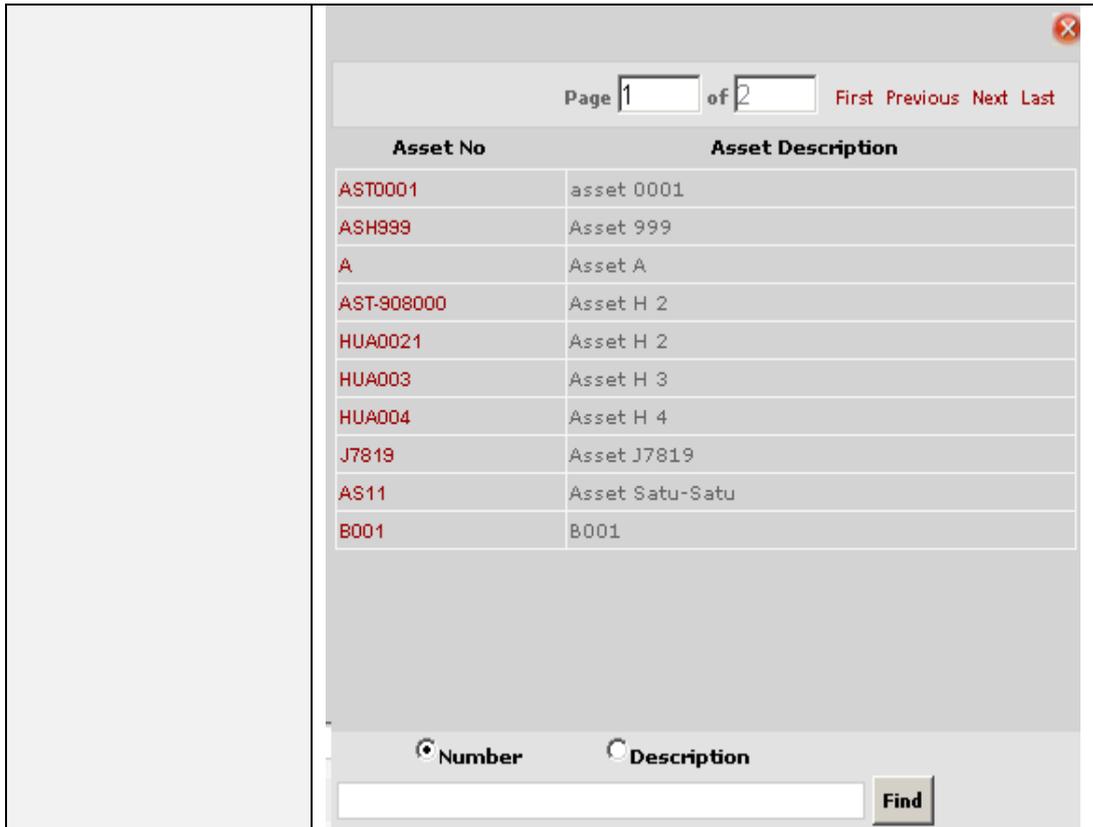
Figure 12: New Work Request Blank Form

| NEW WORK REQUEST FORM | |
|-----------------------|-----------------------------------------------------------------------------------|
| FIELD | DESCRIPTION |
| Received Date/Time | INPUT FIELD This field automatically generates today's date by default. |

| | |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <p>However, if you want to set to some other date, click the calendar icon, , and select a different date.</p> |
| <p>Problem Description</p> | <p>INPUT FIELD Describe the nature of the problem requiring attention, service or maintenance.</p> |
| <p>Work Type</p> | <p>INPUT FIELD Best describe the nature of the work type that is required to eliminate or remedy the problem. Example of work types are:</p> <div data-bbox="628 622 1193 853" data-label="Image"> </div> <p><i>Note</i> This list of work types is created in: Master->Miscellaneous->Work Type</p> |
| <p>Work Trade</p> | <p>INPUT FIELD Best describe the nature of the work trade that is required to eliminate or remedy the problem.</p> <div data-bbox="529 1133 1090 1420" data-label="Image"> </div> <p><i>Note</i> This list of work trade is created in: Master->Miscellaneous->Work Trade</p> |
| <p>Work Priority</p> | <p>INPUT FIELD Describe the urgency of this problem.</p> <div data-bbox="529 1753 1075 1995" data-label="Image"> </div> |

| | |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <p>Note This list of work priorities is created in: Master->Miscellaneous->PRIORITIES</p> |
| <p>REQUESTER INFORMATION</p> | |
| <p>Name</p> | <p>INPUT FIELD</p> <p>Input the name of the person who makes this request by selecting from a pop-up list of names. Click the ellipse button  to display the pop-up list of names.</p> <p>The clear button, , allows you to clear the name field adjacent to it.</p> <hr/> <p> BUTTON ALLOWS YOU TO VIEW ALL the ACTIVE WORK REQUESTS RAISED BY THIS REQUESTER</p> <p>When you click , it will pop up the list of all active Work Requests raised by this requester. From this list, you can select any work request for viewing (you cannot edit anything) and the CMMS will load the details into the Current Work Request form and display it.</p> |
| <p>Department</p> | <p>OUTPUT FIELD (for Display only)</p> <p>Requester's Department Name if it exists and it is related to Requester Number. You will only see this information if it is in the record.</p> |
| <p>Contact Number</p> | <p>OUTPUT FIELD (for Display only)</p> <p>Requester's telephone number if it exists and it is related to Requester Number. You will only see this information if it is in the record.</p> |
| <p>LOCATION/ASSET INFORMATION</p> | |
| <p>Location Number/Asset Number Unavailable</p> | <p>Input: Radio button</p> <p>Select this radio button if you do not have location or asset information for this work request.</p> |
| <p>Location</p> | <p>Input: Radio button</p> |

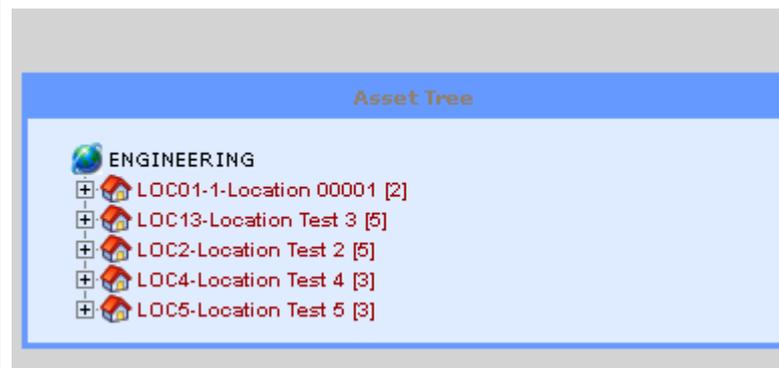
| | |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <p>Select this radio button if you want to associate this work request with a location. Next you need to select a location.</p> <p>To do this, click the ellipse button,  to pop-up a list of locations and from which you can select a location as shown below.</p>  |
| <p>Asset</p> | <p>INPUT: RADIO BUTTON</p> <p>You select this radio button if you want to associate this work request with an asset.</p>  <p>Next, you must select an asset number from a list of assets, which you can pop-up by clicking  on the right of the text field shown above.</p> |



From the pop-up list of assets, you need to click on one of the asset numbers to make the selection. This selection will automatically fills in the information in the following fields shown below:

| | |
|-------------------------|----------------------|
| Asset Location | LOC4-Location Test 4 |
| Asset Department | - |

Alternatively, you can select an asset by using the **asset tree** button and it will display the assets as shown below.



To activate the asset tree, you must click **Asset Tree** button. If the asset entry is complete with location and department

| | | | | | |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|----------------------|-------------------------|---|
| | <p>information, then you should see information in the fields below.</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td style="background-color: #e0e0e0;">Asset Location</td> <td>LOC4-Location Test 4</td> </tr> <tr> <td style="background-color: #e0e0e0;">Asset Department</td> <td>-</td> </tr> </table> | Asset Location | LOC4-Location Test 4 | Asset Department | - |
| Asset Location | LOC4-Location Test 4 | | | | |
| Asset Department | - | | | | |
| <input type="button" value="Save"/> | Save new work request form details to new record. | | | | |

Here are the steps to create **new work request**:

1. At the **Work Request Opening screen** shown in **Figure 11**, use the **current site selector** to select the correct site. This will automatically refresh the work request listing.



2. Click **New Work Requests** to open new work request form shown in **Figure 12**.
3. Set the **work request's date of creation** in the field below

| | | | |
|----------------------|------------------------|--|--------------------------------------|
| Received Date / Time | 30 November 2010 12:09 | | <input type="button" value="Clear"/> |
|----------------------|------------------------|--|--------------------------------------|

Note: The clear button just clear the date field of any input

4. Input problem description into **Problem Description** field.
5. Set **work type** using the drop down list provided.
6. Set **work trade** using the drop down list provided.
7. Set **work priority** using the drop down list provided.
8. Fill in the **requester's name** in the **Name field** by selecting from a pop-up list of names.

| | |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Requester Information | |
| Name | <input type="text" value="E001 - Admin"/> <input type="button" value="..."/> <input type="button" value="Clear"/> <input type="button" value="Pending WR"/> |

You can pop-up the list of names by clicking the ellipse button to the right of the field. Click on the **requester number** to make a selection.

The selection will also fill in the **Department** and **Contact Number** fields (unless such information has not been provided).

9. For **Location/Asset Information** shown below, you must select one of the three **options**.

By default, the CMMS will select the **first option** (top). However, if your work request relates to a location then you can select the **second option** (from top) and use the ellipse button (click on it) to select the appropriate **location number**. On the other hand, if your work request relates to **asset** then you need to select the **third option**.

10. Click  to save the **new work request details**.

After saving, you will see the output the message below.

Successfully added record 29 November 2010 13:07

At the same time, the CMMS will load the new work request details into the **Work Request editing form** for further editing as shown below.

Site : ENGINEERING

The presence of the three buttons    means that this **work request** is still **editable**.

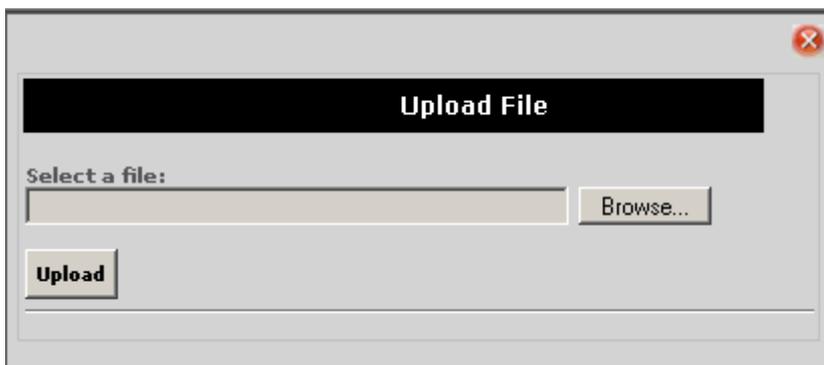
11. At this point, you can continue to edit this **work request details** further and update it with the  button.

12. Click the Attachment Tab  to open the attachment form shown below. This form will enable you to attach files to this work request.

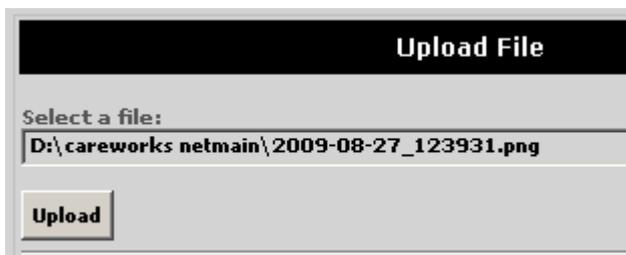
*Note: If you select **Location** for **Location/Asset Information**, then there is no attachment facility in this **option**.*



13. Click  to open the upload dialog as shown below.



14. Click the  button to browse your local folders and select a file. After file selection, you will see the file name as shown below.



You can only select and upload one file at a time.

15. You can begin uploading by clicking  button and the CMMS will add the files into the list as shown below.

| General | | Attachments |
|---------------------|-----------------------|-------------|
| Upload files | | |
| # | File Name | Option |
| 1 | CareWorks logo.gif | Delete |
| 2 | 2009-08-27_123931.png | Delete |

16. Repeat the above upload steps as many times as necessary. Notice that corresponding to each uploaded file, there is a **Delete** link. This link allows you to delete the file if you need to. A click on this link will remove the file from the list.
17. If for some reasons you decided not to proceed with this work request, you can **abort** this work request, by clicking the  button. This will terminate the work request processing.
18. If the **work request** is in order and ready to progress to the Work Order stage, you can generate the **work order** for it by clicking  button. **One point** you should remember is that, once you **generate** the **work order** for any **work request**, you will no longer be able to edit the work request.

19. Finally, you can exit to **Work Request Opening screen** by clicking  .
20. Finish.

2.3 How to Open Existing Work Request For Viewing and Updating

Briefly, this function allows you to go to the **Work Request Opening screen**, where you can select any work request – regardless of its status – from the work request listing, and open it in the **Current Work Request** form. Whether you can change and update a work request really depends on its progress through the **work request processing**. The table below shows when can you open a work request, change its details and update it.

In general, you cannot change and update all **Work Requests** that have been **closed** or **cancelled**.

| WHEN CAN YOU UPDATE WORK REQUESTS | | |
|------------------------------------------|--------------------------|---------------------------------|
| WORK REQUEST Status | WORK ORDER Status | Can update work request? |
| Open | ***None | YES |
| Cancelled | ***None | NO |
| *Work Order Raised | *Open | *NO |
| ** Cancelled | **Cancelled | **NO |
| ** Closed | **Closed | **NO |

Note 1

- * In this situation, the CMMS will **locked the Work Request** and change its status to **Work Order Raised** when you open the work order.
- ** After you **opened the work order**, you no longer have any control over the work request. Instead, the work request will follow whatever your action is on the work order. This means if you close the work order, you also close the work request. If you cancel the work order, you also cancel the work request.
- *** No work order

Note 2

One Work Order can only have **one work request**.

The screenshot displays the 'Current Work Request Form' with the following details:

- General Tab:**
 - Work Request No.: REEM5NJ0800006
 - Work Request Status: Open
 - Work Order No.: EMSNJ08000005
 - Work Order Status: Closed
 - Received Date / Time: 15 July 2008 08:05
 - Problem Description: 今天下午1-2点在培训室召开全厂大会, 届时约有150人出席。请把所有的桌子以较间隔两列, 中间只放椅子。如果不够, 从其他会议室搬一些过来。谢谢!
 - Work Type: Service Request
 - Work Trade: Moves & Setup
 - Work Priority: Urgent
 - Action Taken: (Empty text area)
- Requester Information:**
 - Name: EMSNJ-C045 - Susan Zhu
 - Department: EMSNJ-HR - Human Resource Department
 - Contact Number: (ext: 8111)
- Location / Asset Information:**
 - Location: EMR-1-E214 - Training Center培训中心
 - Asset: (Empty text area)
 - Asset Location: (Empty text area)
 - Asset Department: (Empty text area)

Buttons for 'Cancel WR', 'Generate WO', and 'Update' are visible at the top right and bottom right of the form.

Figure 13: Current Work Request Form Loaded with Details of Existing Work Request

Here are the steps to open an **existing work request** into **Current Work Request Form**:

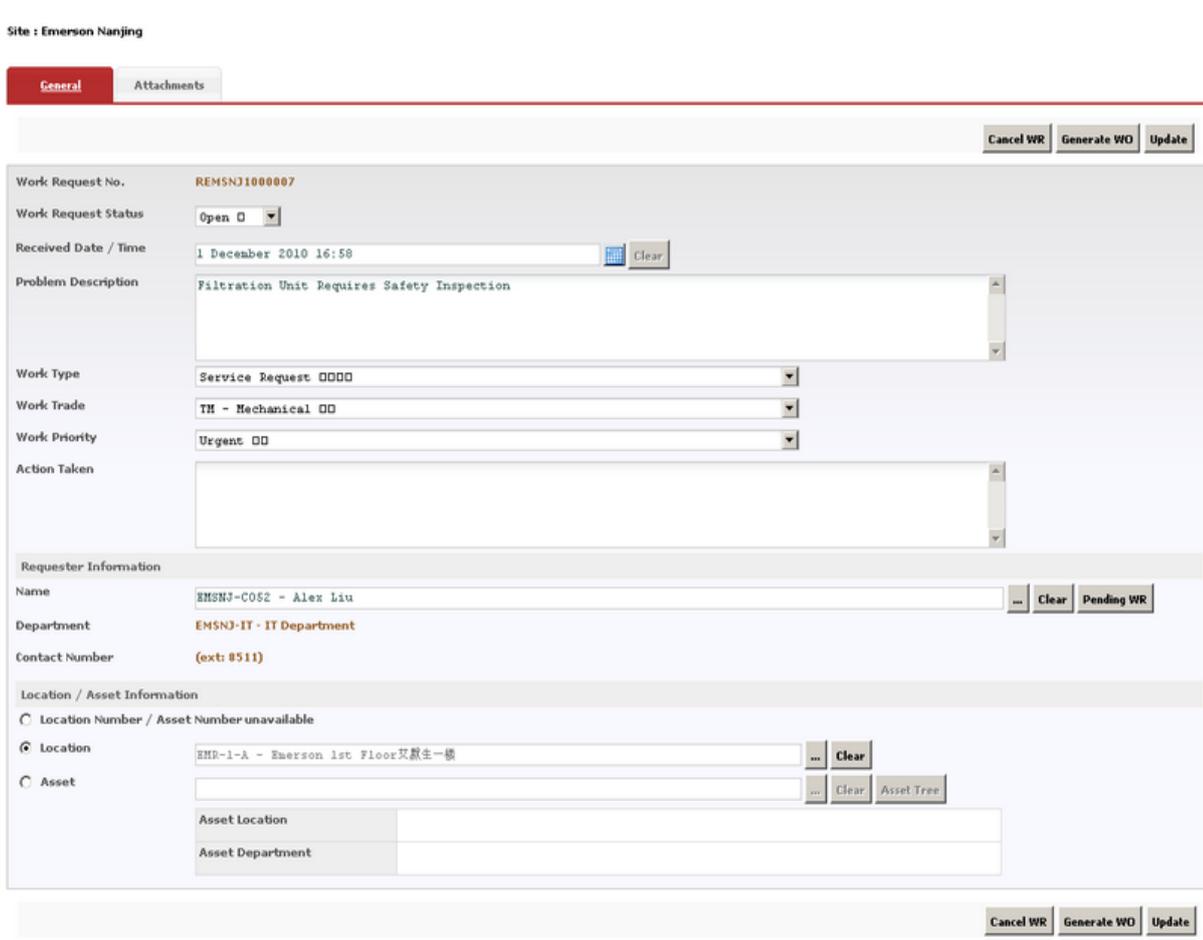
1. At the **Work Request Opening screen** shown in **Figure 11**, use **current site selector** to select the correct site. This will automatically refresh the work request listing.
2. **Scroll** the work request listing or use **search** to locate the work request you want to open.
3. Click on **work request number** to open it for editing in the **Current Work Request form**.
4. Next, change the details on the form accordingly. Please refer to the previous section, which already covers the editing.
5. Save the changes using **Update** button.
6. See the previous section on how to **generate the Work Order**.
7. Finish.

In addition to editing and updating work request details, you can also:

- Cancel work requests by clicking .
- Generate work orders by clicking .

2.4 How to Generate Work Order from Work Request

Briefly, this function allows you to go to **Work Request Opening screen**, where you can select an **active work request** from the work request listing, open it in the **Current Work Request form** as shown below, and generate the **work order** for it.



Site : Emerson Nanjing

General Attachments

Cancel WR Generate WO Update

Work Request No. REMSNJ1000007

Work Request Status Open

Received Date / Time 1 December 2010 16:58 Clear

Problem Description Filtration Unit Requires Safety Inspection

Work Type Service Request

Work Trade TM - Mechanical

Work Priority Urgent

Action Taken

Requester Information

Name EMSNJ-C052 - Alex Liu Clear Pending WR

Department EMSNJ-IT - IT Department

Contact Number (ext: 0511)

Location / Asset Information

Location Number / Asset Number unavailable

Location Emerson 1st Floor 艾默生一樓 Clear

Asset Clear Asset Tree

Asset Location

Asset Department

Cancel WR Generate WO Update

Figure 14: Current Work Request

Site : Emerson Nanjing

| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|------------|------------|
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|------------|------------|

Work Order Number EMSNJ10002468

Work Status Assigned to

Work Request Number REMSNJ1000007

Received Date / Time 1 December 2010 17:10

Problem Description Filtration Unit Requires Safety Inspection

Work Type Corrective

Work Priority Normal

Required Date

Requester Information

Requester EMSNJ-COS2 - Alex Liu

Department EMSNJ-IT - IT Department

Contact Number (ext: 8511)

Customer Type Sodexo Customer

Location / Asset Information

Location Number / Asset Number not available

Location EHR-1-A - Emerson 1st Floor艾默生一樓

Location's Department EMSNJ-SDX - FM - FM - Sodexo Team

Asset

Asset's Location

Asset's Department

Asset's Status

Warranty / Contract

Warranty End Date

Work Order Trade TM - Mechanical

Created By EMSNJ-A001 - Admin

Work Plan

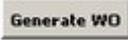
Work Plan Author

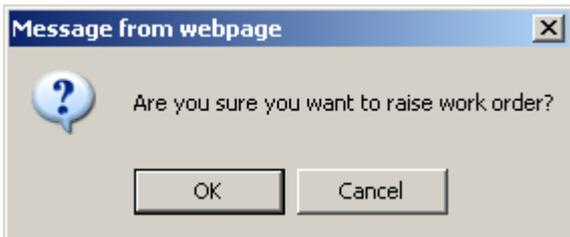
With PTP? Finished?

Sale Price

Figure 15: The Work Order Generated from the Work Request (see Prior figure)

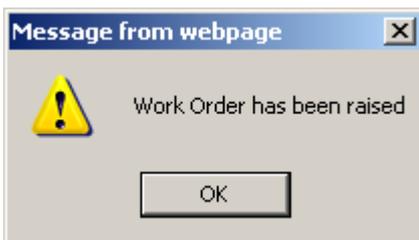
Here are the steps to generate the **work order** for a **work request** that is opened in the Current Work Request form:

1. At the **Work Request Opening screen** shown in **Figure 11**, use **current site selector** to select the correct **site**. This will automatically refresh the **work request listing**.
2. **Scroll** the work request listing or use **search** to locate the work request you want to open.
3. Click on **work request number** to open it in the **Current Work Request** form as shown in **Figure 14**.
4. Click  button to generate the Work Order. Immediately, you will get a message asking for confirmation of your action as shown below.



Click **ok** to **continue** and click **cancel** to **abort**.

When you click **ok**, the CMMS will report that the work order has been raised as shown below.



Close this message by clicking ok.

Finally, the CMMS will **update the work request** by adding the work order details.

5. **Figure 15** Shows the generated work order.
6. Finish.

Note:

The resulting **Work Order** also contains **Work Request Number** it is from originally.

2.5 How to Close Work Request

This section describes how to close a work order. This assumes that you have not generate any work order for it yet.

Site : Emerson Nanjing

General Attachments

Cancel WR Generate WO Update

Work Request No. REMSNJ1100016

Work Request Status Open

Received Date / Time 17 January 2011 16:44

Problem Description Equipment requires Engineering calibration due to a recent repair carried out on it.

Work Type Breakdown

Work Trade TH - Electrical

Work Priority Emergency

Action Taken

Requester Information

Name EMSNJ-A001 - Admin

Department EMSNJ-ADM - Administration

Contact Number

Location / Asset Information

Location Number / Asset Number unavailable

Location

Asset

Asset Location

Asset Department

Cancel WR Generate WO Update

Figure 16: Existing Work Request Opened for Editing

Here are the steps to **close** a work order:

1. At the **Work Request Opening screen** shown in **Figure 11**, use **current site selector** to select the correct site. This will automatically refresh the work request listing.
2. **Scroll** the work request listing or use **search** to locate the work request you want to open.
3. Click on **work request number** to open it for editing in the **Current Work Request** form.

- Click on Work Request status as shown below and select **Closed**.



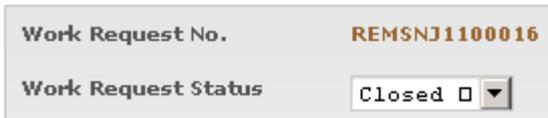
Work Request No. REMSNJ1100016

Work Request Status: Open ▾

Open ▾

Closed ▾

This will set the status as shown below.



Work Request No. REMSNJ1100016

Work Request Status: Closed ▾

- Click **Update** button. The Edit screen will be closed.
- On Work Request listing on the WR Opening Screen you will no longer see the work request in the listing.
- In order to check, you need to use the Work Request Search facility. Set the work request status to **closed** and Run search. You should see the work request in the listing as shown below.

Site: Emerson Nanjing ▾

Page 1 of 1 First Previous Next Last

| Work Request No. | Work Order No. | Problem Description | Req. Status | Work Status | Received Date |
|------------------|----------------|--------------------------------------------------------------------------------------|-------------|-------------|-----------------------|
| REMSNJ1100022 | | Problem 120 | Closed ▾ | | 1 February 2011 10:58 |
| REMSNJ1100019 | | Test work order 122 | Closed ▾ | | 31 January 2011 13:03 |
| REMSNJ1100016 | | Equipment requires Engineering calibration due to a recent repair carried out on it. | Closed ▾ | | 17 January 2011 16:44 |
| REMSNJ1100014 | | system checking | Closed ▾ | | 17 January 2011 13:51 |

- Finish.

2.6 How to Print Work Request



Briefly, this function allows you to go to **Work Request Opening** screen in **Figure 11**, where you can select an **active work request** from the work request listing, open it in **Current Work Request form**, and print it.

Here are the steps to open **existing work request** into **Current Work Request Form** and print it:

1. At the **Work Request Opening screen** shown in **Figure 11**, use **current site selector** to select the correct site. This will automatically refresh the work request listing.
2. **Scroll** the **work request listing** or use **search** to locate the work request you want to open.
3. Click on **work request number** to open it in the **Current Work Request form** as if you are going to edit it.



4. Next click icon.
5. Finish.

2.7 How to Cancel Work Request

Briefly, this function allows you to go to **Work Request Opening screen**, where you can select an **active work request** from the **work request listing**, open it in **Current Work Request form**, and cancel it.

Notes:

1. You can cancel only **active** work requests.
2. You have not yet generated **work orders** for them.

| WHEN CAN YOU CANCEL WORK REQUESTS | | | |
|-----------------------------------|----------------------|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| No. | WORK REQUEST Status | WORK ORDER Status | Safe to Cancel work request? |
| 1. | An open Work Request | No Work Order for the Work Request yet | YES |
| 2. | An open Work Request | Work Order generated for the Work Request | NO Cancelling a work request after you have generated work order for it, can give rise to complication. |

Here are the steps to cancel active **Work Request** which has no corresponding work order yet:

1. At the **Work Request Opening screen** shown in **Figure 11**, use **current site selector** to select the correct site. This will automatically refresh the work request listing.
2. **Scroll** the **work request listing** or use **search** to locate the work request you want to cancel.
3. Click on the **work request number** to open it in **Current Work Request form** as if you are going to edit it.
4. Next click  icon.
5. Finish.

In situation where a work request has a corresponding work order, the only way you can cancel it is to **open the work order** and **cancel** it. In another word, you must go to Work Order Section to do this.

3. WORK ORDERS

The icon shows a yellow clipboard with a blue checklist and a red pencil, set against a white background. This is enclosed in a red square, which is further enclosed in a black square. The text "Work Order" is centered below the red square.

ACCESSING THE WORK ORDERS

You can access the **Work Orders on CWorks EASY opening screen** by clicking the **icon** on the left, which will open the **Work Order Opening Screen**.

The **Work Order** module allows you to manage maintenance work orders; an important component in the CMMS. Through this module, you can create work orders for all kind of maintenance activities. The work order is the single most important module as it controls all maintenance activities. Without a work order, no activities can proceed. As a rule, work orders are **mandatory**.

Work orders are *authorized job orders* essential in order to carry out for instance corrective and preventive maintenance activities, quality inspections, health, engineering and safety inspections, etc. The work orders will have the names of personnel or contractors assigned to carry out these activities; locations of these activities; the list of assets if any that are connected with these activities, and more. In short, work orders capture aspects of maintenance such as where, when, how, who, what, cost, duration and more. Upon receiving the **work order request**, the maintenance department can generate the **work order** for it.

3.1 Work Order Opening Screen

Figure 17 below shows the **Work Order Opening screen**. Every time you go to this screen after logging in, it automatically lists the work orders (except CLOSED or CANCELLED work orders) in the work order listing area, for the site assigned to you. If you want to change to another site, use the **current site selector** (a drop-down list just above the work order listing area).

In order to help you search for a work order, you will find a **Work Order search facility** provided at the bottom of the screen. It also supports the ability to **export** search results to **Excel**.

WORK ORDER LIST

Welcome **Elias Ishak**
Seconds before redirect: **892**
[Change Level](#)

- 
List
Work Orders
- 
New
Work Order
- 
First Line Fix

Site : **Emerson Nanjing**

Page **1** of **425** [First](#) [Previous](#) [Next](#) [Last](#)

| WorkorderNo | Work Status | Problem Description | Work Type | Date Received | Date Required |
|-----------------|-------------------------------|-----------------------|-------------------------------------|-----------------------|---------------|
| PMEMSNJ11010... | Open <input type="checkbox"/> | □□□□ | Preventive <input type="checkbox"/> | 17 January 2011 15:44 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | Test | Preventive <input type="checkbox"/> | 17 January 2011 15:44 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | JVA JIAHA HJAHA HJS | Preventive <input type="checkbox"/> | 17 January 2011 15:44 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | TEST GEN | Preventive <input type="checkbox"/> | 17 January 2011 15:44 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | test | Preventive <input type="checkbox"/> | 17 January 2011 15:44 | |
| PMEMSNJ11010... | In Progress... | PM Event Cleaning | Preventive <input type="checkbox"/> | 11 January 2011 16:02 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | PM Event Cleaning | Preventive <input type="checkbox"/> | 11 January 2011 16:02 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | Fixed dated and month | Preventive <input type="checkbox"/> | 11 January 2011 16:02 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | Fixed dated and month | Preventive <input type="checkbox"/> | 11 January 2011 16:02 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | □□□□□□□□ | Preventive <input type="checkbox"/> | 11 January 2011 16:02 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | PM Clening 2 | Preventive <input type="checkbox"/> | 11 January 2011 16:02 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | TRY Cleaning | Preventive <input type="checkbox"/> | 11 January 2011 16:02 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | PMFDWIG001 | Preventive <input type="checkbox"/> | 11 January 2011 11:40 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | PMFDWIG001 | Preventive <input type="checkbox"/> | 11 January 2011 11:40 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | PMFDW01 | Preventive <input type="checkbox"/> | 11 January 2011 11:40 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | PMFDTM | Preventive <input type="checkbox"/> | 11 January 2011 11:40 | |
| PMEMSNJ11010... | Open <input type="checkbox"/> | PM Clening 2 | Preventive <input type="checkbox"/> | 11 January 2011 11:40 | |

Search Criteria

Work Order No. [...]

Work Order No.

Requestor No.

Work Type

Work Status

Description

Date Received **From** **To**

Work Trade

Target S. Date **From** **To**

Required Date **From** **To**

Est. S. Date **From** **To**

PC Code

Failure Code

Remedy Code

Asset No.

Location No.

Work Priority

Assign To

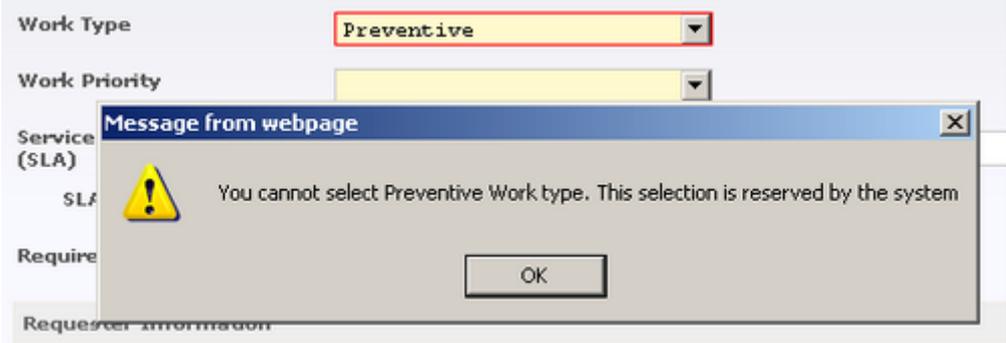
Customer Type Both Sodexho Customer

Compliant Type Both Non-Compliant Compliant

Sort By

Figure 17: The Work Order Opening Screen

The table below describes the function of each **menu icon** at the top of the **Work Order Opening screen**.

| No | Menu Icon | Description |
|----|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. |  <p>List Work Orders</p> | <p>Anytime this icon is clicked, from anywhere in this module, the CMMS will open the WORK ORDER LISTING screen.</p> |
| 2. |  <p>New Work Order</p> | <p>Click this icon to open a new work order form. It allows the user to create a new work order.</p> <p>Note:</p> <p>The 'PREVENTIVE' work type is exclusively reserved for scheduled preventive maintenance work orders. Therefore, it cannot be selected by the user for a new work order. Such attempt will cause the warning message shown below.</p> <p>Preventive Maintenance work orders are generated by an operator or administrator manually when the service due event triggers the preventive maintenance schedule to send an alert to the CMMS screen.</p>  |
| 3. |  <p>First Line Fix</p> | <p>This facility holds a library of standard faults/problems, their possible causes and the troubleshooting instructions that could either clear or confirm that the problem persists. The instruction will allow a support staff to walk a user through the troubleshooting procedures.</p> <p>Upon receipt of a reported problem, a maintenance support staff can reference the problem in the library and run through the troubleshooting instructions with the client on the phone.</p> |

3.2 How to Search for Work Orders

The screenshot shows a search interface for work orders. It features a list of search criteria on the left, each with an input field and a 'Clear' button. The criteria include: Work Order No. [...], Work Order No., Requestor No., Work Type, Work Status (with a pre-filled value '{all exc.Cl., Ca.}'), Description, Date Received (with 'From' and 'To' date pickers), Work Trade, Target S. Date (with 'From' and 'To' date pickers), Required Date (with 'From' and 'To' date pickers), Est. S. Date (with 'From' and 'To' date pickers), PC Code, Failure Code, Remedy Code, Asset No., Location No., Work Priority, Assign To, Customer Type (with radio buttons for 'Both', 'Sodexho', and 'Customer'), and Compliant Type (with radio buttons for 'Both', 'Non-Compliant', and 'Compliant'). At the bottom, there is a 'Sort By' dropdown menu currently set to 'Workorder Number' and 'Descending (Z->A)'. On the right side, there are buttons for 'Export to Excel', 'Print', 'Reset', and 'Search' at both the top and bottom of the form.

Figure 18: Work Order Search Facility

You can run a search using one or more combinations of the criteria on the form shown in **Figure 18** above and have the search output sorted in any combination of the *sort* options (Work Order No., Work Type, Work Status, Description, Date Received, etc).

3.3 New Work Orders

3.3.1 SLA Message



Why do you get the message above on the screen?

- The CMMS outputs the message above if the site **Service Level Agreement (SLA) 'Resolution Time'** parameter/value is not set.
This parameter need to be set according to your service level agreement.
Once it is set, this message will stop appearing on the screen.

Where do I set the SLA parameters?

Importance:

If you do not understand how to set these parameters please ask for technical assistance from maintenance to help you. See your administrator if you do not have access privilege to set these parameters or to the Master Module.

- These parameters are in the **Master Module**: one is found under the **Holiday Tab** and the other is under the **SLA Resolution Time Tab**. In order to set these parameters, first go to the Master Module and select the **Holiday Tab**. Under this tab, set by marking the holiday days that are excluded in the SLA agreement. Once that is done, finally, go to the **SLA Resolution Time Tab** to set the 'time resolution' parameter/value. That should stop the above message appearing further.

Where are the SLA parameters used?

- These parameters are used only by the **Corrective work type form**.

3.3.2 Closing Parent Work Orders closes its Children Work Orders

When a **Parent Work Order** is closed by an authorized user, the CMMS by default will also close the Children Work Orders belonging to the parent. Therefore, before executing this action, it is crucial that you understand the implication of what you are doing at this point, as any mistake will be difficult to rectify after such action.

3.3.3 Review of Work Order Form and its Variations by Work Type

When the user first opened a new work order form (using the new work order icon), the CMMS will display the **generic form** without any specific 'work type'. However, as soon as the user set the **Work Type**, the form will automatically change to display additional fields, accordingly. The table below summarizes the additional fields that will appear in the work order form according to work type (when applicable).

| | WORK TYPE | EXTRA FIELDS ON THE FORM |
|---|---------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| 1 | Blank. In the new Work Order Form, this is left as blank, initially. It is left to the user to select the type. | Generic new work order form |
| 2 | Manual Preventive | Two extra fields appear on the form: PM Number PM Task Number |
| 3 | Preventive (PM generated work order) | Two extra fields appear on the form: PM Number PM Task Number |
| | | |

In "**manual preventive**" and "**preventive**" work type, the fields that appear on the work order form are indicated by the red box below:

The screenshot shows a form with the following fields and controls:

- Work Type:** A dropdown menu with "Manual Preventive" selected. This field is highlighted with a red border.
- Work Priority:** A dropdown menu with a yellow background.
- Required Date:** A text input field with a calendar icon and a "Clear" button.
- PM Number:** A text input field, highlighted with a red border.
- PM Task Number:** A text input field with a "..." button and a "Clear" button, highlighted with a red border.

Please note, for 'preventive' and "Manual Preventive" work types, the **work order form** is the same in every respect. In addition, there will be **extra tabs** on these forms that are not found in cases of other work types. The most obvious example of this differences can be clearly seen when "Manual Preventive" and "preventive" work type forms are compared to "corrective" work type form.

At present, the total number of work types is shown below.

The screenshot shows a dropdown menu for "Work Type" with the following options:

- Corrective
- Preventive
- Service Request
- Service - Out of Scope
- Service - Reimbursable
- Manual Preventive
- Breakdown
- New Project

3.3.4 How to Create a New Work Order

NEW WORK ORDER

 Welcome Elias Ishak
 Seconds before redirect: 892
[Change Level](#)

List Work Orders

New Work Order

First Line Fix

Site : Cworks Malaysia

Work Order

Closing

Work Status Open

Received Date / Time 17 January 2011 17:03

Problem Description

Work Type

Work Priority

Required Date

Requester Information

Requester ...

Department

Contact Number

Customer Type Sodexho Customer

Location / Asset Information

Location Number / Asset Number not available

Location ...

Location's Department

Asset ...

Asset's Location

Asset's Department

Asset's Status

Warranty / Contract

Warranty End Date

Work Order Trade

Created By

Figure 19: A Generic New Work Order Form

Here are the steps to create a **new work order**:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above.
Select the site using the **current site selector**

2. Click the **New Work Order** icon on the right in order to open the **new Work Order form** as shown in **Figure 19**.



3. In the **Received Date/Time** field as shown below,
set a different date if the current date shown is not suitable.

Received Date / Time 23 February 2011 10:55

4. In the **Problem Description** field as shown below, type the clearest description of the issue to be addressed by this work order.

Problem Description

5. From the drop-down list selector as shown below, select a **work type**. Note, this parameter will determine if any additional fields will be displayed in the work form.

Work Type

Work Priority

Required Date

Requester Information

Requester

Corrective

Preventive

Service Request

Service - Out of Scope

Service - Reimbursable

Manual Preventive

Breakdown

New Project

If work type is "Manual Preventive", the work order form will display two extra fields: PM Number, PM Task Number, as shown below.

Fill in these fields if you select this work type.

For **work type "Corrective"**, these fields will not be present on the form.

6. Select **Work Priority** from a drop-down list selector as shown below.

7. Set the date in the **Required Date** field.
8. Under **Requester Information**, fill in **Requester** field with the name of the requester. To select the **name of the requester**, click the ellipsis button, , which will pop-up the list of requesters as below. Select a requester by clicking on the **Requester No.** from this list.

| Requester No | Name | Ext.No |
|--------------|----------------------|--------|
| EMSNJ-A001 | Admin | |
| ben2 | Ben Holson | 36 |
| ELI2011 | Elias Ishak | 36 |
| J001 | Jiva | |
| 002 | John Baker | 8 |
| 001 | Nurul Huda Mat Yunus | |
| EMSNJ-A002 | William Shi | |
| EMSNJ-A004 | ☐☐-Clara Liu | 8666 |
| EMSNJ-A00003 | ☐☐☐ | |

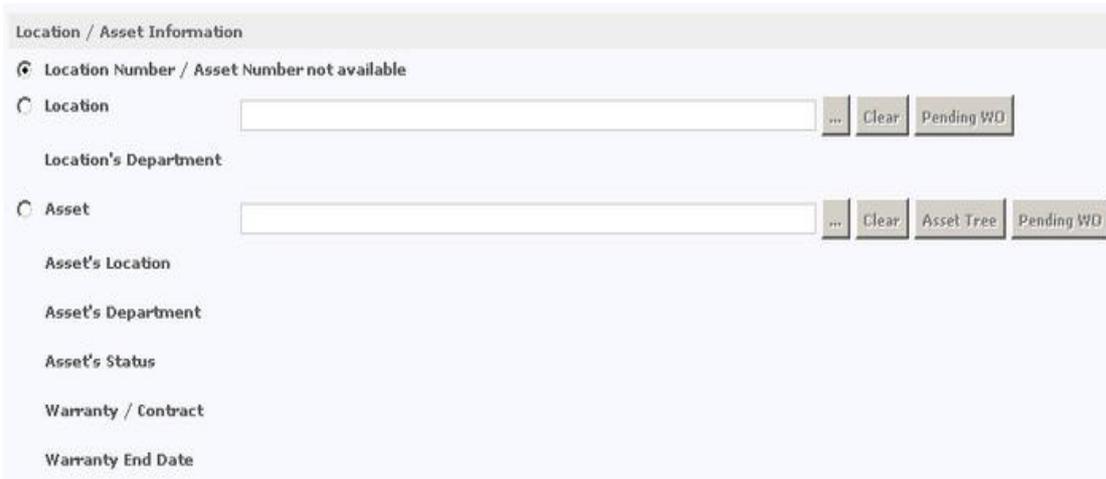
The CMMS will response by filling in the **Department** and **Contact Number** fields as below. This presumes all details are available with the requester name.

In addition, the CMMS will output any Pending Work Orders in the panel as below.



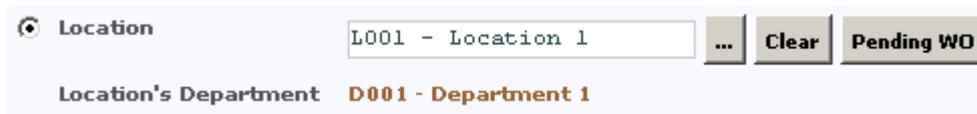
Click **close** to clear this panel.

9. Under **Location/Asset Information**, select one of the three options below:
 - a. *Location Number/Asset Number not available*
 - b. *Location*
 - c. *Asset*



Notes on this input

- i. *The first option "**Location Number/Asset Number not available**" does not require any input.*
- ii. *The second option "**Location**" will require input as shown below.*



Click the ellipsis button, , to display a pop-up list of locations as below.

| Location No | Location Description |
|-------------|----------------------|
| L001 | Location 1 |
| 001 | Location1 |
| L002 | Store room |

Location No Location Description

Then, make a selection by clicking on a location number. The CMMS responded by filling in the **Location** and the **Department** of this Location.

iii. The third option "**Asset**" will require input to the **Asset** field as below.

Asset A121 - Asset 121 ... Clear Asset Tree

Asset's Location L002 - Store room
Asset's Department D002 - AAdmin
Asset's Status Active
Warranty / Contract Warranty
Warranty End Date

Click the ellipsis button, , to display a pop-up list of Assets as shown below.

| Asset No | Asset Description |
|---------------|-------------------|
| EMSNJ-N000010 | 6#000000 |
| A120 | Asset 120 |
| A121 | Asset 121 |
| A122 | Asset 122 |
| A123 | Asset 123 |
| A124 | Asset 124 |
| A125 | Asset 125 |
| ASS4 | Asset 4 |
| A117 | Asset A117 |

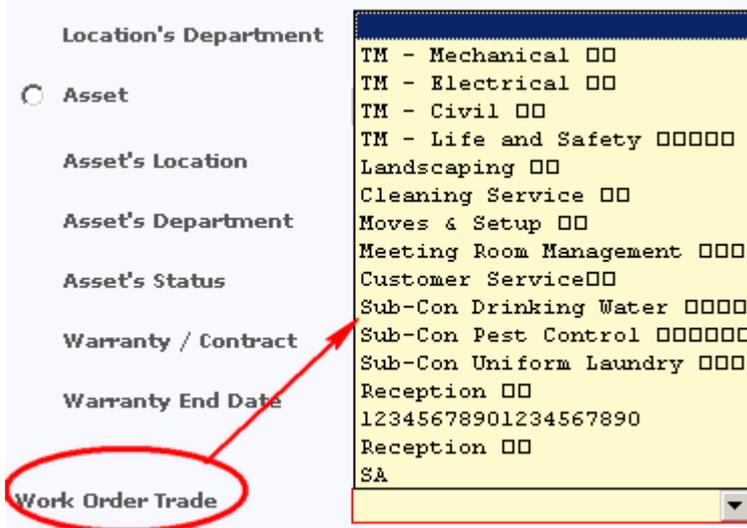
Asset No Asset Description

Then, click an asset number, the CMMS will respond by filling in the **Asset** field and display the other details below the field. This presumes that the other details

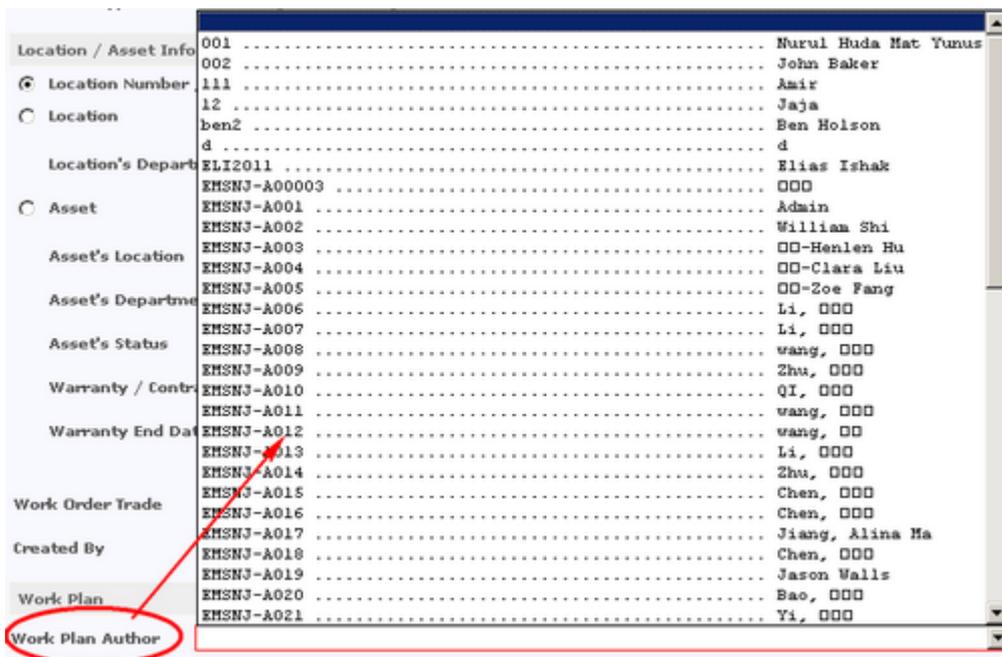
have been fully provided in the Asset details previously.

Alternatively, select an asset using the **Asset Tree** button

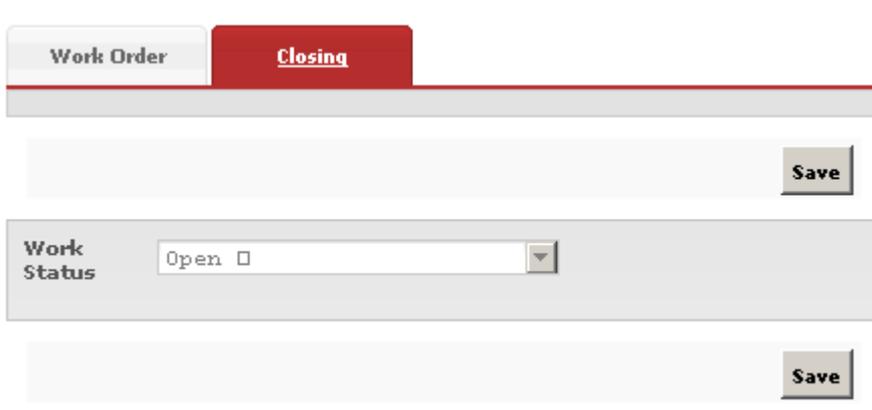
10. Select a **Work Order Trade** using the drop-down list shown below.



11. Under the **Work Plan** section, set the **Work Plan Author** field. You can set this field by clicking the drop-down list as shown below and then clicking on one of the numbers on the left corresponding to the Author on the right.



12. Click the **Closing** . When the CMMS display this tab, you should see that the the Work Status is "**Open**", as shown below.



The screenshot shows a web interface with two tabs: 'Work Order' and 'Closing'. The 'Closing' tab is active and highlighted in red. Below the tabs, there is a form with a 'Work Status' dropdown menu set to 'Open'. There are 'Save' buttons on the right side of the form.

13. Click the **save** button **Save** .

The screen will change to Work Order Editing screen as shown below.

| | | | | | | | | | | | |
|-------------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|------------|------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|-------------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|------------|------------|

Work Order Number 500111000009

Work Status Open

Work Request Number

Received Date / Time 23 February 2011 13:53

Problem Description Clean the air conditioning unit.

Work Type Service Request

Work Priority Normal

Required Date 3 March 2011 14:37

Requester Information

Requester ELI2011 - Elias Ishak

Department EMSNJ-QD - Quality Department

Contact Number 60386569041 (ext: 36)

Customer Type Sodexho Customer

Location / Asset Information

Location Number / Asset Number not available

Location

Location's Department

Asset A122 - Asset 122

Asset's Location L002 - Store room

Asset's Department D002 - Admin

Asset's Status Active

Warranty / Contract Warranty

Warranty End Date

Work Order Trade TM - Electrical

Created By ELI2011 - Elias Ishak

Work Plan

Work Plan Author EMSNJ-A019 Jason Walls

With PTP? **Finished?**

Sale Price

14. At this point, the CMMS has opened the **Work Order editing form**.

Now, the user is can continue to add details to the present tab, and other tabs too.

15. Click  to save any changes or additions.

16. Finish.

3.4 How to View, Edit or Modify Existing Work Orders

CURRENT WORK ORDER
Welcome **Elias Ishak**
Seconds before redirect: 892
[Change Level](#)

List Work Orders

New Work Order

Print Work Order 1

Print Work Order 2

First Line Fix

Print WO with Attachment

Print WO with PM Attachment

Email Work Order

Site : Cworks Malaysia

Work Order
Assign To
Closing
Labour
Direct Issue
Services
Materials
Cost Summary
Job Plan
Safety Instructions
Job Actual
Attachment

Update

| | |
|----------------------|-----------------------------------------------------------------------------------------------------------|
| Work Order Number | S0011000002 |
| Work Status | Open <input type="checkbox"/> |
| Work Request Number | RS0011000002 |
| Received Date / Time | 13 December 2010 17:29 <input type="button" value="Clear"/> |
| Problem Description | Replace or Repair equipment as required. Must comply with health regulation as stated in health handbook. |
| Work Type | Corrective <input type="checkbox"/> |
| Work Priority | Normal <input type="checkbox"/> |
| Required Date | <input type="text"/> <input type="button" value="Clear"/> |

Requester Information

Requester:

Department: -

Contact Number:

Customer Type: Sodexho Customer

Location / Asset Information

Location Number / Asset Number not available

Location:

Location's Department:

Asset:

Asset's Location:

Asset's Department:

Asset's Status:

Warranty / Contract:

Warranty End Date:

| | |
|------------------|------------------------------------------|
| Work Order Trade | TM - Mechanical <input type="checkbox"/> |
| Created By | J001 - Jiva |

Update

Figure 20: Work Order – Editing an Existing Work Order (Corrective work type)

| Menu & Buttons | DESCRIPTION |
|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <p>List Work Orders</p> | Go to the WORK ORDER opening screen and list all work orders for the first site. |
|  <p>New Work Order</p> | Create New Work Order. It opens a blank work order form. |
|  <p>Print Work Order 1</p> | Print the work order in the format suitable for service personnel to take to a job site. It will print the detail of the work requested. A preview is provided before printing. |
|  <p>Print Work Order 2</p> | Print the completed work order . A preview is provided before printing. |
|  <p>First Line Fix</p> | Access the list of fixes to maintenance problems |
|  <p>Print WO with Attachment</p> | Print the work order and attachments |
|  <p>Print WO with PM Attachment</p> | Print the work order and PM attachments |
|  <p>Email Work Order</p> | Email the Work Order |
|  <p>Update</p> | click this button to update the work order. |

Here are the steps to select and open an existing work order:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where the **work order listing** is. Change to the correct **site** containing the target work order if necessary, using the current **site selector** (drop-down list) as shown below.

Note: The CMMS will refresh the work order listing every time the site is changed.



- After selecting the **site**, the CMMS will refresh the work order listing. Select the **work order** for editing by clicking the **work order number** as shown below.



The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

- When you make changes to the work order on any of the tabs, click **Update** to save the changes.
- Finish.

3.5 How to Assign Employees to a Work Order

Site : Cworks Malaysia

Work Order **Assign To** Closing **Labour** Direct Issue Services Materials Cost Summary Job Plan Safety Instructions Job Actual Attachment

Work Order Number: 500110000002

Work Status: Open

Employee: ...

Start Date / Time:

End Date / Time:

Workorder Employee Assign Listing

| # | Employee Number | Employee Name | Start Date/Time | End Date/Time |
|----------------------------------------------------------------------------------------------------------|-----------------|---------------|-----------------|---------------|
| Assign to Supplier / Contractor: <input type="text" value="-"/> ... <input type="button" value="Clear"/> | | | | |

Figure 21: The Assign Tab – for Assigning Employees to Work Order

For each work order, you can assign one or more employees to it, and specify the start and end dates for each employee. Here are the steps to assign each employee:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list) as shown below.

Note: The CMMS will refresh the work order listing every time you change the site.



2. After selecting the **site**, from the work order listing, you select and open the target **work order** for editing by clicking on the **work order number** as shown below.



The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click **Assign to Tab** to display the form as shown in **Figure 21** above. Alternatively, you can use Search to find and open a specific work order for editing.

- Select an **employee** from the list of employees as shown below (via a drop-down list).

| Employee No | Name |
|-------------|----------------------|
| ELI2011 | Elias Ishak |
| J001 | Jiva |
| 001 | Nurul Huda Mat Yunus |
| NH009 | Shasha1 |
| JP001 | Tiramitsu |
| EMSNJ-A005 | DD-Zoe Fang |

Employee No Name

- Add **start date** and **end date** for this employee.

Employee: Shasha1

Start Date / Time: 8 February 2011 14:14

End Date / Time: 11 February 2011 14:15

Note: if you want you can view the employee’s workload by clicking the

button.

- Click **Add into list ▼**. The CMMS will add the name to the list as shown below. Also, notice that the **Work Status** has changed to **"Assigned to"**.

Work Order Number PMS00211000023

Work Status Assigned to

Employee ... Clear

Start Date / Time Clear

End Date / Time Clear

Add into list ▼
View Available Work Orders

Workorder Employee Assign Listing

| # | Employee Number | Employee Name | Start Date/Time | End Date/Time |
|---|-----------------|---------------|-----------------------|------------------------|
| 1 | NH009 | Shasha1 | 8 February 2011 14:14 | 11 February 2011 14:15 |

Assign to Supplier / Contractor ... Clear

- Repeat step (4) to assign more employees to this work order.
- Click **Update** to save the details to this work order.
- Finish.

3.6 How to Close Work Order

Site : Cworks Malaysia

Work Order Assign To **Closing** Labour Direct Issue Services Materials Cost Summary Job Plan Safety Instructions Job Actual Attachment

Update

Work Order Number **500110000002**

Work Status **Status Trail**

| Date/ Time Details | Estimated | Actual |
|--------------------|-----------------------------------|-----------------------------------|
| Assessment | <input type="text"/> Clear | <input type="text"/> Clear |
| Start | <input type="text"/> Clear | |
| End | <input type="text"/> Clear | |

HandOver Date / Time **Clear**

Downtime (Hours) **Calc**

Additional Information

Compliant Type Non-Compliant Compliant

PC Code

Failure Code

Remedy Code

Cost Centre

Accepted By **...** **Clear**

Cause Description

Action Taken

Prevention Taken

CSR Notes

Customer Feedback

Update

Figure 22: Work Order Opened for Editing Prior to Closing

When a job is **completed**, you must complete a few final details in the work order, set work status to **Closed** and then close it by clicking **Update**.

Note: You cannot modify a closed work order, therefore make sure that you enter all the necessary details accurately before closing by clicking button .

To **close** a work order, follow the steps below,

1. Go to the **Work Order Opening** screen shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

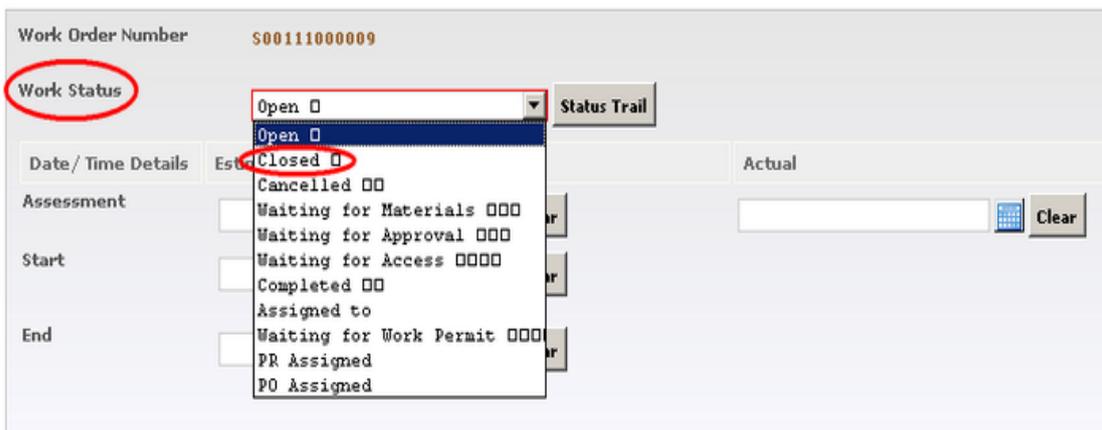
Note: *The CMMS will refresh the work order listing every time you change the site.*

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **Closing Tab** to access the **closing form** as in **Figure 22**.
4. Set **Work Status** field to **Closed** via the drop-down list as shown below.



The screenshot displays the 'Work Order Number' S00111000009. The 'Work Status' field is circled in red, and its dropdown menu is open, showing various status options. The 'Closed' option is also circled in red. Other status options include 'Open', 'Cancelled', 'Waiting for Materials', 'Waiting for Approval', 'Waiting for Access', 'Completed', 'Assigned to', 'Waiting for Work Permit', 'PR Assigned', and 'PO Assigned'. The form also includes a 'Status Trail' button, an 'Actual' field, and a 'Clear' button.

- The CMMS immediately display the additional fields associated with closing a work order as shown below in the red box area.

- Fill in those two fields for the **Actual Start** and **End dates**, which are necessary before you can close this work order.
- Fill in any other fields if needed.
- Click **Close WO** to close the work order. The CMMS will update and change the screen to that shown below. Notice that the update button has changed to **Reopen** button, **Reopen**.

| | | | | | | | | | | | |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|------------|------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|------------|------------|

Reopen

Work Order Number **S00111000008**

Work Status Closed ▾ Status Trail

| Date/ Time Details | Estimated | Actual |
|----------------------|---------------------------------------------------------------|-----------------------------------------------------------------|
| Assessment | <input type="text"/> Clear | <input type="text"/> Clear |
| Start | <input type="text"/> Clear | 23 February 2011 11:21 Clear |
| End | <input type="text"/> Clear | 23 February 2011 11:21 Clear |
| HandOver Date / Time | <input type="text"/> Clear | |
| Downtime (Hours) | <input type="text"/> Calc | |

Additional Information

Compliant Type Non-Compliant Compliant

PC Code

Failure Code

Remedy Code

Cost Centre

Accepted By ... Clear

Cause Description

Action Taken

Prevention Taken

CSR Notes

Customer Feedback

Closed By EMSNJ-A001 - Admin

Reopen

9. If you click Reopen, you can re-open the work order.
10. Finish.

Note on setting other work order status

When a job is **cancelled**, or held back for some reason, you should always set the job's work order status accordingly and save the work order via **Update** button.

3.7 How to Add Labor to Work Order

Site : Cworks Malaysia

Work Order Assign To Closing **Labour** Direct Issue Services Materials Cost Summary Job Plan Safety Instructions Job Actual Attachment

Update

Work Order Number: 50011000002

Work Status: Open

Employee: ... **Clear**

Start Date / Time: **Clear**

End Date/Time: **Clear**

Comments:

Cost Calculation

| Hours | | | | Total | |
|----------------------|----------------------|----------------------|----------------------|-------|--------------|
| Normal | OT1 | OT2 | OT3 | Hours | Overall Cost |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | | |
| Calculate | Calculate | Calculate | Calculate | | |

Add into list ▼

| Workorder Employee Listing | | | | | | | | | | | |
|----------------------------|---------------|-----------------|---------------|-----------------------------------|-----|-----|-----|-------------|-------------|----------|--------|
| # | Employee Name | Start Date/Time | End Date/Time | Normal | OT1 | OT2 | OT3 | Total Hours | Total Costs | Comments | Option |
| Total Hours | | | | <input type="text" value="0"/> | | | | | | | |
| Total Cost | | | | <input type="text" value="0.00"/> | | | | | | | |

Update

Figure 23: Entering Labor Details into Work Order

In order to help your organization manage manpower resources and overtime efficiently, you need to record each work order's **total man-hours**.

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: *The CMMS will refresh the work order listing every time you change the site.*

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **Labour Tab**  to open up the **form** as in **Figure 23**.
4. Enter the man-hours details and save.
5. Finish.

3.8 How to Add Direct Issue Parts to Work Order

Site : Cworks Malaysia

Work Order Number: 50011000002

Work Status: Open

Date:

Service and Part / Description:

Purchase Order Number:

Quantity:

Unit Price:

Total Price:

| Direct Issue Listing | | | | | | |
|----------------------|----------------------|--------|----------|------------|-------------|--------|
| Date | Service / Part Desc. | PO No. | Quantity | Unit Price | Total Price | Option |
| | | | | | | |

Figure 24: Entering Direct Issue Details into Work Order

For some works, the parts or items needed to complete the work may not be in stock. In this case, the engineer has to purchase the parts on an ad-hoc basis and have it dispatched to the site. This is what is called **Direct Issue**.

Here are the steps to add direct issue parts to work order:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

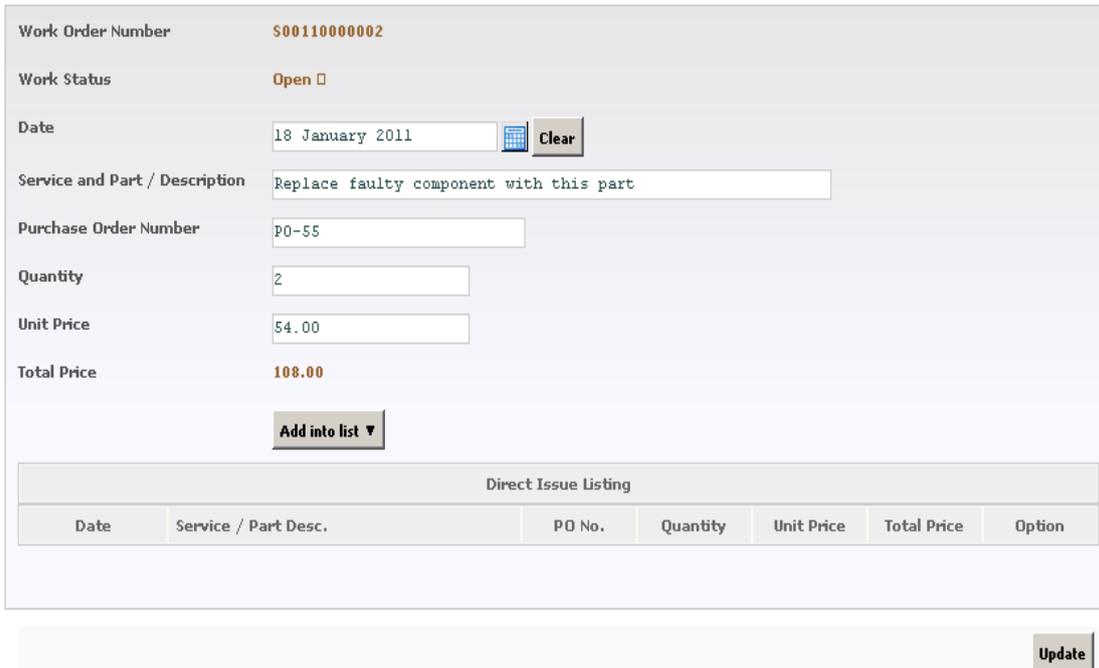
Note: *The CMMS will refresh the work order listing every time you change the site.*

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **Direct Issue Tab**  to open up the **form** as in **Figure 24** above.
4. Enter the **direct issue** details as shown below.



The screenshot shows a form for entering direct issue details. The fields are as follows:

- Work Order Number: 500110000002
- Work Status: Open
- Date: 18 January 2011 (with a calendar icon and a 'Clear' button)
- Service and Part / Description: Replace faulty component with this part
- Purchase Order Number: P0-55
- Quantity: 2
- Unit Price: 54.00
- Total Price: 108.00

Below the form is an 'Add into list' button with a dropdown arrow. Underneath is a table titled 'Direct Issue Listing' with the following columns: Date, Service / Part Desc., PO No., Quantity, Unit Price, Total Price, and Option. At the bottom right of the form area is an 'Update' button.

5. Add the part to the Direct Issue Listing by clicking .
6. Repeat the above steps as required if you have more parts to issue.
7. Click  to save.
8. Finish.

3.9 How to Add Services (as Direct Issue) to Work Order

Site : Cworks Malaysia

| Supplier | Service | Rate | Quantity | Total | Options |
|-------------------|---------|------|----------|-------|---------|
| Craft Metal Works | | | | | Add |
| Grand Total | | | | | |

Figure 25: Adding Services

Here are the steps to **add services** as direct issue to work order:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: The CMMS will refresh the work order listing every time you change the site.

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **Services** Tab to open up the **services form** as in **Figure 25** above.

4. Select supplier using the drop-down list as shown below.

5. Select service from the drop-down list as shown below.

6. After you select a service, the CMMS will display the **rate** for this service as shown below.

7. Enter the **quantity** of the service in the **Quantity** column and click **Add**.
The CMMS will update the display as shown below. Notice the CMMS has added the service to the list.

| Supplier | Service | Rate | Quantity | Total | Options |
|-------------------|-----------|------|----------|-------|---------|
| Craft Metal Works | Service 1 | 1.00 | 5.00 | 5 | Delete |
| Grand Total | | | | 5 | |

Note: You can set supplier's services and its rate in the **Master** under **Supplier Tab**.

8. Continue adding service if you have more to add.

9. You can delete any services that you entered by clicking the **Delete** link corresponding the that service.

Site : Cworks Malaysia

| | | | | | | | | | | | |
|------------|-----------|---------|--------|--------------|-----------------|-----------|--------------|----------|---------------------|------------|------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|--------------|-----------------|-----------|--------------|----------|---------------------|------------|------------|

Update

| Supplier | Service | Rate | Quantity | Total | Options |
|----------------------|----------------------|------|----------|-------|---------------|
| <input type="text"/> | <input type="text"/> | | | | Add |
| Craft Metal Works | Service 1 | 1.00 | 2.00 | 2 | Delete |
| Grand Total | | | | 2 | |

Submit to Direct Issue

Update

10. Finally, add the service as **Direct Issue** by clicking **Submit to Direct Issue**.

11. The CMMS added the service as direct issue under the Direct Issue tab as shown below.

The screenshot shows the 'Direct Issue' tab selected in the CMMS interface. The form contains the following fields:

- Work Order Number: S00111000009
- Work Status: Open
- Date:
- Service and Part / Description:
- Purchase Order Number:
- Quantity:
- Unit Price:
- Total Price:

Below the form is a table titled 'Direct Issue Listing' with the following data:

| Date | Service / Part Desc. | PO No. | Quantity | Unit Price | Total Price | Option |
|------------------|--------------------------------|--------|----------|------------|-------------|--------|
| 24 February 2011 | Craft Metal Works -- Service 1 | | 5 | 1.0000 | 5.00 | DELETE |

12. Click to save.

13. Finish.

3.10 How to Issue and Return Material Parts From Work Orders

This section describes how to issue and return material parts from work orders. Although you will see only one form, it is actually composed of two separate forms combined together. Further, whether you will see one, both or none of these forms, really depends on your accessibility needs. Your administrator will decide whether you need this access or not and set this permission up accordingly (see corresponding sub-section below how this is set up).

3.10.1 How to Issue Material Parts to Work Order

This section describes how an administrator can grant/deny an employee the permission to issue material parts to **work orders** in the **Material Section/module**. As for regular users, it describes how to issue material parts to work orders.



Administrators can set regular users permission to this option via **Administration menu**,



, under **Additional Permission Tab** as shown above.

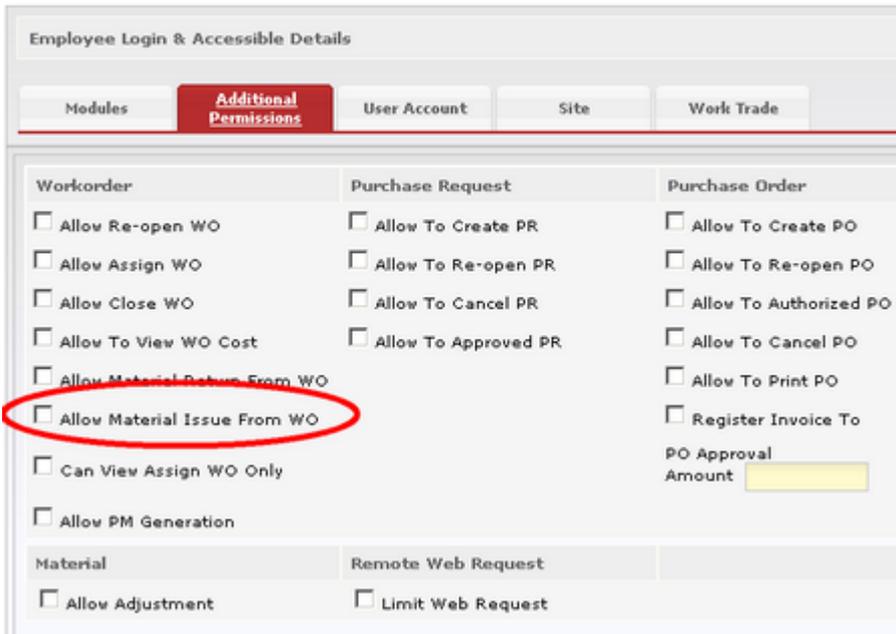
Note

After you saved the Material record, you will not be able to delete or undo it. Therefore, it is important that you enter the details correctly, check its correctness and then save it.

There are two cases you need to know with regard to '**Allow Material Issue From WO**'. Both cases depend on whether you have the permission to access this option or not. Consequently, it determines whether you can see the **form segment** under the **Material Tab** related to '**Allow Material Issue from WO**' or not. If your administrator grants you this permission then you will be able to issue materials to work orders, and this form segment will be visible to you for data entry. Otherwise, you will not see this form segment.

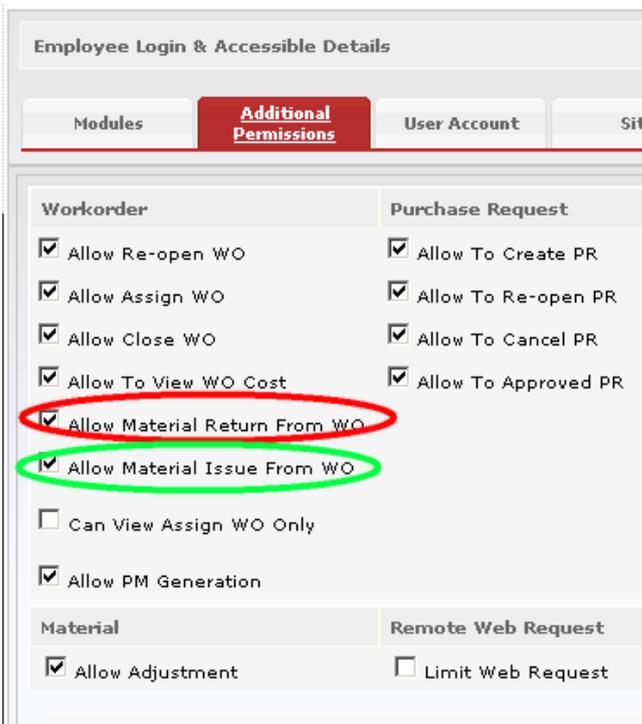
Here is a brief description of these two cases:

1. CASE 1– Permission Denied



From the diagram above (circled in red), which can be found in the **Administration** section (see Chapter 13) under the **Additional Permission Tab**, the administrator **denies permission** to this user (by not checking the box circled in red above) to **'Allow Material Issue from WO'**. As a result, this user will not see an additional form **segment** for issuing material from work orders because the CMMS will hide it from view.

2. Case 2 – Permission Granted



From the diagram above (circled in green), which can be found in the **Administration** section (see Chapter 13) under the **Additional Permission Tab**, the administrator has **granted permission** (by ticking the box) to 'Allow Material Issue from WO'. As a result, this user will see an additional form for issuing material from work orders because the CMMS will display it on view as shown below, enabling the user to issue material to this Work order.

Site : Cworks Malaysia

Work Order | Assign To | Closing | Labour | Direct Issue | Services | **Materials** | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment

Select part number to add to this Work Order here - via the ellipsis button on the right

Update

Work Order Number: 500110000003

Work Status: Open

Part Number: ...

Part Description:

Sub Store:

Date:

Clear

Part Balance:

Quantity:

Avg. Unit Price:

Total Price:

Issue Part ▼

Issued Parts

| # | Date | Part Number | Part Description | Qty. | Avg. Unit Price | Total Price |
|---|------|-------------|------------------|------|-----------------|-------------|
|---|------|-------------|------------------|------|-----------------|-------------|

List of materials added to this Work Order will appear beneath this heading

Figure 26: Additional Form under Material Tab for Issuing Material to Work Orders

Site : Cworks Malaysia

| | | | | | | | | | | | |
|------------|-----------|---------|--------|---------------------|----------|------------------|--------------|----------|---------------------|------------|------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|---------------------|----------|------------------|--------------|----------|---------------------|------------|------------|

Work Order Number: **S0011000002**

Work Status: **Open**

Part Number:

Part Description:

Sub Store:

Date:

Part Balance:

Quantity:

Avg. Unit Price:

Total Price:

| Issued Parts | | | | | | |
|--------------|------|-------------|------------------|------|-----------------|-------------|
| # | Date | Part Number | Part Description | Qty. | Avg. Unit Price | Total Price |
| | | | | | | |

Date:

Quantity:

Total Price:

Comment:

Part Number:

Average Unit Price:

Balance:

Sub Store:

| Returned Parts | | | | | | |
|----------------|------|-------------|------------------|------|-----------------|-------------|
| # | Date | Part Number | Part Description | Qty. | Avg. Unit Price | Total Price |
| | | | | | | |

Figure 27: Work Order Material Tab Form – showing additional forms for Issuing and Returning Materials from Work Orders

To **issue material parts** to a work order, the steps are:

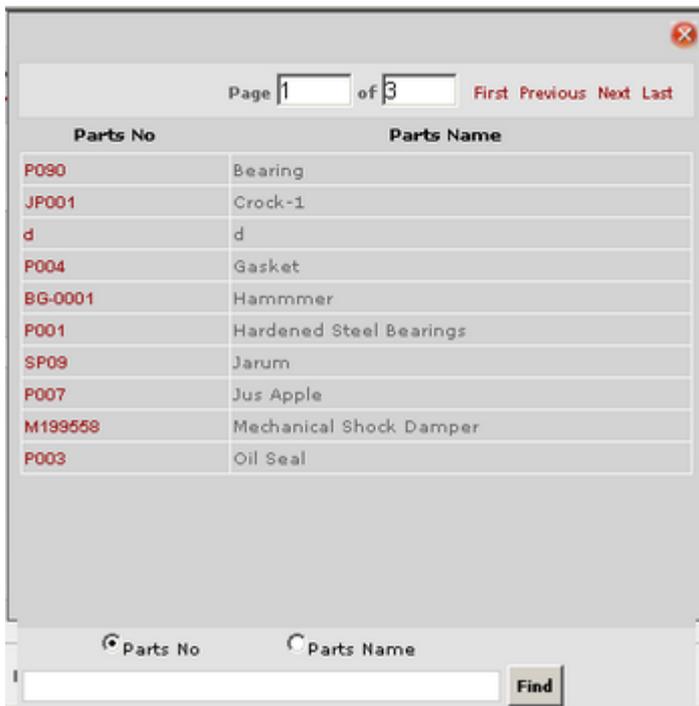
1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: The CMMS will refresh the work order listing every time you change the site.

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**. The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **Materials Tab**  to display the material details form as in **Figure 27**.
4. Select the Sub Store you will be issuing from.
5. Click the ellipsis next to the **Part Number field** to select a part from a pop-up window as shown below.



| Parts No | Parts Name |
|----------|-------------------------|
| P090 | Bearing |
| JP001 | Crock-1 |
| d | d |
| P004 | Gasket |
| BG-0001 | Hammer |
| P001 | Hardened Steel Bearings |
| SP09 | Jarum |
| P007 | Jus Apple |
| M199559 | Mechanical Shock Damper |
| P003 | Oil Seal |

Click on the part number to select it.

This will be the part that you will issue to this Work Order.

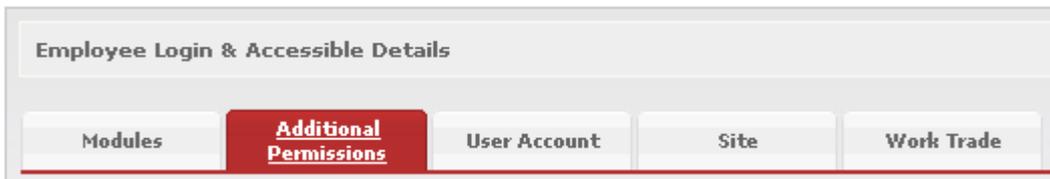
6. Select the issue date .
7. Type a number in the **Quantity** field (cannot be more than the balance in the store). This is the quantity to issue to this Work Order.

8. Click . This will enter the part into **Issued Part** listing.
9. Save the whole work order by clicking **Update** .
10. Finish.

See to the next section on how to return material parts from work orders.

3.10.2 How to Return Material Parts From Work Order

This section describes granting and denying permission to **return material** parts from **work orders** through **Material Section/module** for administrators. As for regular users, it describes how to return material parts from work orders.



Administrators can set regular users permission to this option via **Administration menu**,



under **Additional Permission Tab** as shown above.

Note

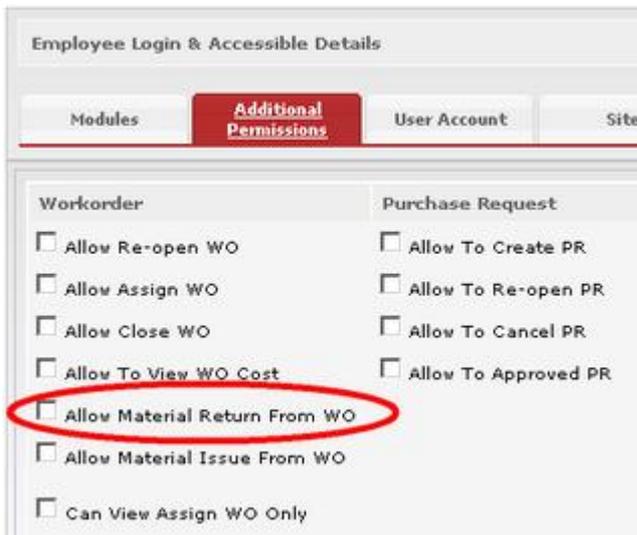
After you saved the Material record, you will not be able to delete or undo it. Therefore, it is important that you enter the details accurately.

There are two cases you need to know with regard to '**Allow Material Return From WO**'. Both cases depend on whether you have the permission to access this option or not. Consequently, it determines whether you can see the **form segment** under the **Material Tab** related to '**Allow Material Return from WO**' or not. If your administrator grants you this permission then you will be able to **return** materials from work orders, and this form segment will be visible to you for data entry. Otherwise, you will not see this form segment.

Here is a brief description of these two cases:

1. CASE 1– Permission Denied

In **Administration menu**, under **Additional Permission Tab**, the administrator has **denied permission** to 'Allow Material Return from WO'. That is this option's checkbox is **unchecked** as shown below.



The screenshot shows the 'Employee Login & Accessible Details' window with the 'Additional Permissions' tab selected. The 'Workorder' section contains the following permissions:

| Workorder | Purchase Request |
|--------------------------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Allow Re-open WO | <input type="checkbox"/> Allow To Create PR |
| <input type="checkbox"/> Allow Assign WO | <input type="checkbox"/> Allow To Re-open PR |
| <input type="checkbox"/> Allow Close WO | <input type="checkbox"/> Allow To Cancel PR |
| <input type="checkbox"/> Allow To View WO Cost | <input type="checkbox"/> Allow To Approved PR |
| <input type="checkbox"/> Allow Material Return From WO | |
| <input type="checkbox"/> Allow Material Issue From WO | |
| <input type="checkbox"/> Can View Assign WO Only | |

Consequently, the **form** under the **Material Tab** (current Work Order), will not display the additional form **segment** related to this option. Thus, the user cannot return material from this Work order.

2. CASE 2 – Permission Granted

In **Administration menu**, under **Additional Permissions Tab**, the administrator has granted the permission to 'Allow Material Return from WO' to the user as shown below in red circle. That is the option's **checkbox** has a checkmark in it.

Consequently, the **form** under the **Material Tab** (current Work Order), will display the additional form **segment** related to this option. Thus, the user can return material from this Work order. The figure below shows this form segment.

Figure 28: Additional Form Segment under the Material Tab for Returning Material from Work Orders

Site : Cworks Malaysia

| | | | | | | | | | | | |
|------------|-----------|---------|--------|---------------------|----------|------------------|--------------|----------|---------------------|------------|------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|---------------------|----------|------------------|--------------|----------|---------------------|------------|------------|

Work Order Number: **50011000002**

Work Status: **Open**

Part Number:

Part Description:

Sub Store:

Date:

Part Balance:

Quantity:

Avg. Unit Price:

Total Price:

Issued Parts

| # | Date | Part Number | Part Description | Qty. | Avg. Unit Price | Total Price |
|---|------|-------------|------------------|------|-----------------|-------------|
| | | | | | | |

Date:

Quantity:

Total Price:

Comment:

Part Number:

Average Unit Price:

Balance:

Sub Store:

Figure 29: Work Order Material Tab Form – showing additional form segments for Issuing and Returning Materials from Work Orders

To **return material parts** from a work order, the steps are:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: The CMMS will refresh the work order listing every time you change the site.

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **Materials Tab**  to display the material details form as in **Figure 29**.
4. Select the return date .
5. Click the ellipsis next to the **Part Number field** to select a part from a pop-up.

Important Note:

There will be parts to return if you have issued parts to this work order previously. Otherwise, you will see no parts listed in this pop-up listing of parts.

Click on the part number to select return it from this Work Order.

6. Type the return quantity in the **Quantity** field.
 7. Click  and it will appear in the **Returned Part** listing.
 8. Save the work order by clicking **Update** .
 9. Finish.
-

3.11 How to View Purchase Order

Site : Emerson Nanjing

| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | PO | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|--------------|----------|-----------|-----------|--------------|----------|---------------------|------------|------------|
|------------|-----------|---------|--------|--------------|----------|-----------|-----------|--------------|----------|---------------------|------------|------------|

Update

| | |
|--------------------------|----------------------|
| Work Order Number | EMSNJ10001248 |
| Work Status | PO Assigned |

| Part No | Part Description | PO No | PO Status | Quantity | Price |
|---------|------------------|----------------|----------------|----------|---------------|
| P090 | Bearing | POEMSNJ1000008 | Not Authorised | 16.00 | (MYR) 96.0000 |
| BG-0001 | Hammer1 | POEMSNJ1000007 | Not Authorised | 7.00 | (USD) 35.0000 |

Update

Figure 30: Work Order PO Tab

Here are the step to open the PO Tab:

- Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).
Note: *The CMMS will refresh the work order listing every time you change the site.*
- After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.
The CMMS will open it in the editing form as shown in **Figure 20**.
Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.
- Click the **PO Tab**  to gain access to it as shown in **Figure 30**.
This tab shows the **all the parts** that are on order for this work order. It also shows which **purchase order numbers** are associated with the ordered part.
- Finish.

3.12 How to View Cost Summary of Work Orders

Site : Cworks Malaysia

| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|-------------------------|-------------------------------|---------|--------|--------------|----------|-----------|---------------------|----------|---------------------|------------|---------------------------------------|
| | | | | | | | | | | | <input type="button" value="Update"/> |
| Work Order Number | 50011000002 | | | | | | | | | | |
| Work Status | Open <input type="checkbox"/> | | | | | | | | | | |
| Total Labour Cost | 0.00 | | | | | | | | | | |
| Total Direct Issue Cost | 0.00 | | | | | | | | | | |
| Total Material Cost | 0.00 | | | | | | | | | | |
| Overall Cost | 0.00 | | | | | | | | | | |
| | | | | | | | | | | | <input type="button" value="Update"/> |

Figure 31: Work Order – Cost Summary

This section displays total cost of a work order in local currency. Here are the steps to view cost summary for a work order:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: *The CMMS will refresh the work order listing every time you change the site.*

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **Cost Summary Tab** to open the summary screen as in **Figure 31**.
4. Finish.

3.13 How to View Work Order's PM Checklist

This section describes the work order **PM Checklist Tab**. However, please note that you will only see this tab when the **work order** is **type Preventive**. Otherwise, the tab will not be present. The figure below shows the work order type.

The screenshot shows the 'WORK ORDER LIST' interface. At the top right, there is a user greeting: 'Welcome Elias Tshab', 'Seconds before Change Level!', and an 'Open Request' button. Below the header, there are three main navigation icons: 'List Work Orders', 'New Work Order', and 'First Line Fix'. A dropdown menu for 'Site' is set to 'Japan'. A table lists work orders with columns for 'WorkorderNo', 'Work Status', 'Problem Description', 'Work Type', 'Date Received', and 'Date Required'. The 'Work Type' column for the first two rows is 'Preventive'. A red callout box with a red arrow points to the 'Preventive' text in the 'Work Type' column, containing the text: 'The tab changes to 'PM CHECKLIST' if the work order type is Preventive. You will not see 'Job Plans Tab' in this case.'

| WorkorderNo | Work Status | Problem Description | Work Type | Date Received | Date Required |
|----------------|-------------------------------|---------------------|-------------------------------------|-----------------------|---------------|
| PMS00211000029 | Open <input type="checkbox"/> | CLEANING SERVICE | Preventive <input type="checkbox"/> | 22 January 2011 10:53 | |
| PMS00211000028 | Open <input type="checkbox"/> | CLEANING SERVICE | Preventive <input type="checkbox"/> | 22 January 2011 10:53 | |

Figure 32: Work Order Listing on the Work Order Opening Screen

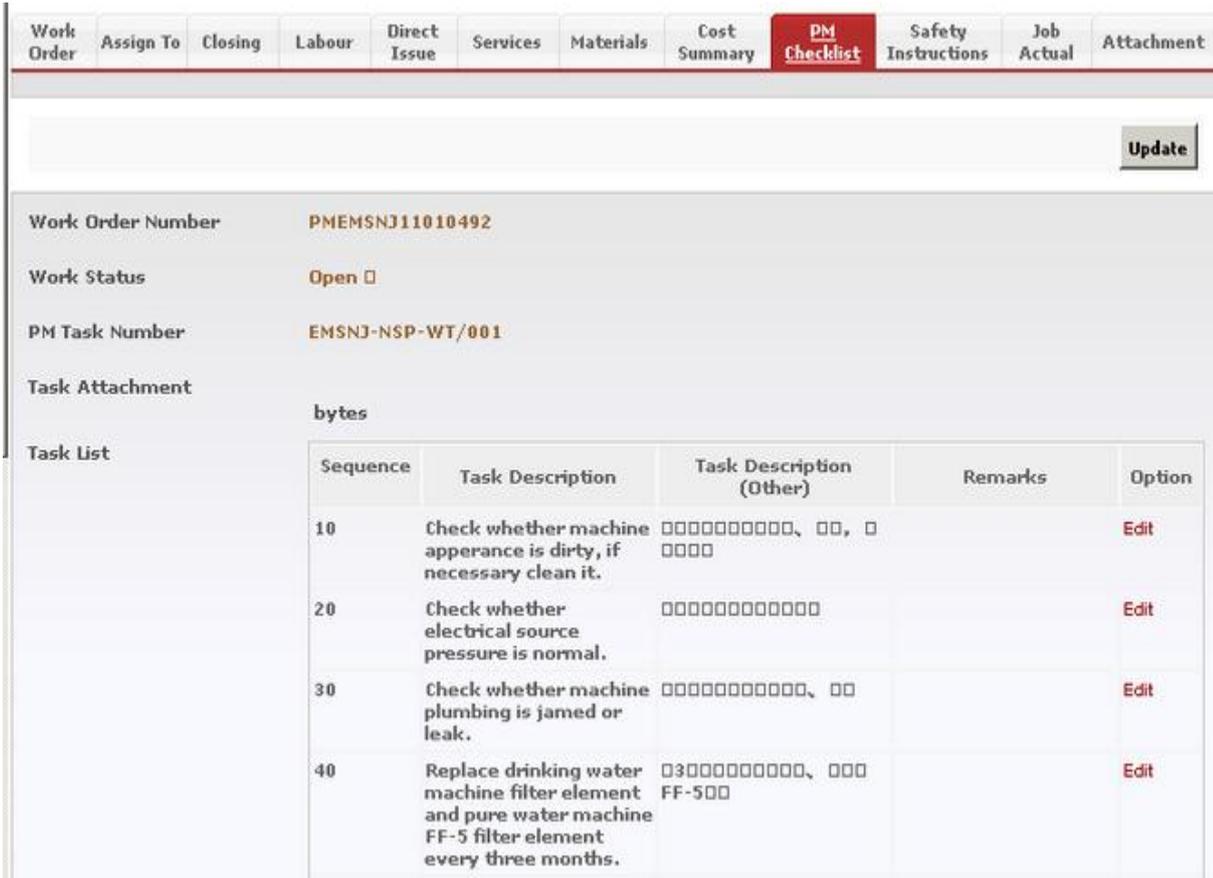


Figure 33: Work Order's PM Checklist Tab Display

Here are the steps to open this tab:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: *The CMMS will refresh the work order listing every time you change the site.*

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **PM Checklist Tab** **PM Checklist** to display this tab as shown in **Figure 33**.
4. In the checklist, you can add or edit the **remarks** as shown below task by clicking the **edit link**.

Work Order Number: PMEMSJ11010492
 Work Status: Open
 PM Task Number: EMSNJ-NSP-WT/001
 Task Attachment: bytes

| Sequence | Task Description | Task Description (Other) | Remarks | Option |
|----------|--------------------------------------------------------------------------------------------------------------|--------------------------|--------------------|-----------------|
| 10 | Check whether machine appearance is dirty, if necessary clean it. | 0000000000, 00, 00000 | Use cleaning agent | Update Cancel |
| 20 | Check whether electrical source pressure is normal. | 000000000000 | | Edit |
| 30 | Check whether machine plumbing is jamed or leak. | 0000000000, 00 | | Edit |
| 40 | Replace drinking water machine filter element and pure water machine FF-5 filter element every three months. | 03000000000, 000FF-500 | | Edit |
| 50 | Replace pure water machine's RO film every six months. | 060000000R00 | | Edit |

To save the remark, click **Update** and to or click cancel to abort.

5. Finish.

3.14 How to Add, View or Change Work Order's Job Plan

This section displays work order's **Job Plan Tab** and described how you can add, view or modify work order's job plan. However, the most important point to note is that: you will only see this tab when the work order is type **Corrective**. The figure below shows the work order type.

WORK ORDER LIST
Welcome Elias Ichak
Seconds before Open Request
[Change Level](#)

List Work Orders

New Work Order

First Line Fix

The tab changes to JOB PLANS if the work order has work type corrective. You will not see 'PM Checklist Tab' in this case.

Site: Cworks Malaysia

| WorkorderNo | Work Status | Problem Description | Work Type | Date Received | Date Required |
|-------------|-------------------------------|---------------------------------------------------------------|-------------------------------------|------------------------|---------------|
| S0011000003 | Open <input type="checkbox"/> | Examine the state of this equipment and replace part if ne... | Corrective <input type="checkbox"/> | 13 December 2010 17:31 | |
| S0011000002 | Open <input type="checkbox"/> | Replace or Repair equipment as required. Must comply wi... | Corrective <input type="checkbox"/> | 13 December 2010 17:29 | |

Site : Cworks Malaysia

| | | | | | | | | | | | |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|-----------------|---------------------|------------|------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|-----------------|---------------------|------------|------------|

Work Order Number **S00110000002**

Work Status **Open**

Add an Existing Job Plan

Job Plan

Create / Modify a Job Plan Item

Details

(to go to the links, if any, hold Ctrl and double click on it)

Figure 34: Work Order's Job Plan Tab Display

Here are the steps to open this tab and add a job plan:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: The CMMS will refresh the work order listing every time you change the site.

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click the **Job Plan Tab** to display this tab as shown in **Figure 34**.
4. There are two ways you can add a job plan. One way you can add a job plan is for you to type the job plan details as shown below and click the Save button .

| | | | | | | | | | |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|-----------------|---------------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|-----------------|---------------------|

Work Order Number: S00110000002

Work Status: Open

Add an Existing Job Plan

Job Plan:

Create / Modify a Job Plan Item

Details
(to go to the links, if any, hold Ctrl and double click on it)

Replace all rubber sealants on the equipment cover when the level of vibration becomes noticeable to the touch.

After you clicked the Save button, the form will change to that shown below.

| | | | | | | | | | |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|-----------------|---------------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|-----------------|---------------------|

Work Order Number: S00110000002

Work Status: Open

Add an Existing Job Plan

Job Plan:

Create / Modify a Job Plan Item

Details
(to go to the links, if any, hold Ctrl and double click on it)

Replace all rubber sealants on the equipment cover when the level of vibration becomes noticeable to the touch.

Another way you can add a job plan is to select from a collection of job plans prepared previously, using the drop down list shown below.

Work Order Number **S00110000002**

Work Status **Open**

Add an Existing Job Plan

Job Plan

Create / Modify a Job Plan Item

Details
(to go to the links, if any, hold Ctrl and double click on it)

JPO01 - Job Plan 001

JPLN0012 - CLEANING AIR FILTERS - Inspect the bearings on

When you click on a job plan on the list, the CMMS will load its details as shown below.

| | | | | | | | | | | | |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|------------|------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|------------|------------|

Work Order Number **S00110000002**

Work Status **Open**

Add an Existing Job Plan

Job Plan

Create / Modify a Job Plan Item

Details
(to go to the links, if any, hold Ctrl and double click on it)

1. Switch off electrical power to the air condition unit. Unplug the power cord.
2. Remove the cover at the back.
3. Gently undo the four screws for the air filter fixing frame.

5. You can continue to edit further and update it with button. Or, you can remove the plan using **Remove button** if you have made a mistake.
6. Finally, click update button (the one on the outside of the panel as shown below) to make sure that you save the record.

The screenshot shows a software interface with a form. At the top right, there is a button labeled 'Update' circled in red. Below this, the form contains the following elements:

- A field labeled 'Number' with the value '500110000002'.
- A field labeled 'Open' with a dropdown arrow.
- A section labeled 'Job Plan' with a dropdown menu.
- A section labeled 'a Job Plan Item' containing a text area with the text: 'Replace all rubber sealants on the equipment cover when the level of vibration becomes noticeable to the touch.'
- Below the text area are three buttons: 'Update', 'Remove', and 'Print'.

At the bottom right of the form, there is another 'Update' button circled in red.

7. Finish.

3.15 How to Add Safety Instructions to Work Order

The screenshot shows a software interface with a menu bar at the top. The 'Safety Instructions' tab is selected and highlighted in red. Below the menu bar, there is a form with the following elements:

- A button labeled 'Update' at the top right.
- A field labeled 'Work Order Number' with the value '500110000002'.
- A field labeled 'Work Status' with the value 'Open' and a dropdown arrow.
- A section labeled 'Copy From Master Safety Instruction' with a dropdown menu.
- A section labeled 'Create / Modify a Safety Entry' containing a text area with the text: 'Replace all rubber sealants on the equipment cover when the level of vibration becomes noticeable to the touch.'
- Below the text area are three buttons: 'Update', 'Remove', and 'Print'.
- At the bottom left of the form is a 'Save' button.
- At the bottom right of the form is an 'Update' button.

Figure 35: Work Order – Adding Safety Instructions to Work Order

Here are the steps to add a **safety instruction** to work order:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: *The CMMS will refresh the work order listing every time you change the site.*

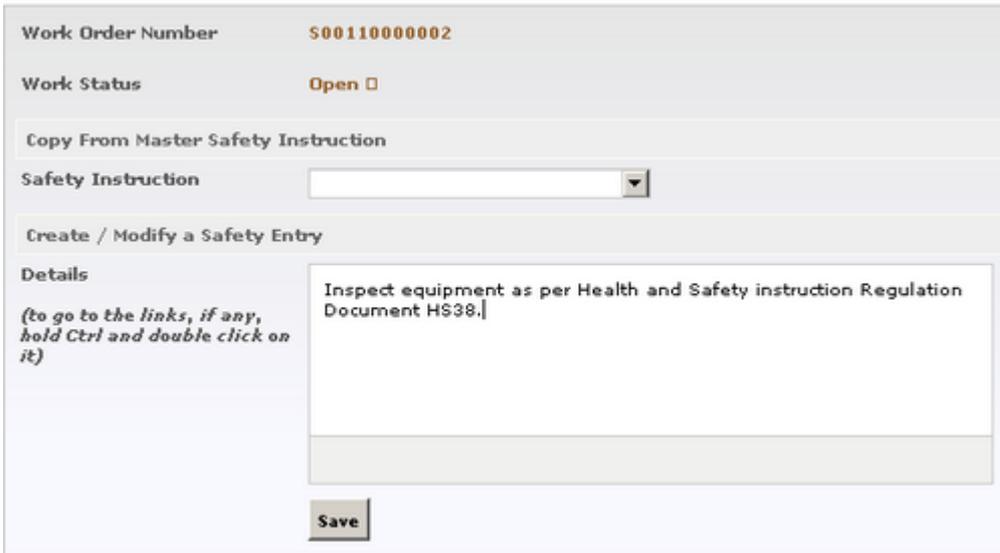
2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click **Safety Instruction Tab**  to display it as shown in **Figure 35** above. There are two ways to enter safety instructions.

4. One way is to enter **safety instructions** into the '**Details**' field as shown below and save it with  button.



Work Order Number **S00110000002**

Work Status **Open**

Copy From Master Safety Instruction

Safety Instruction

Create / Modify a Safety Entry

Details

(to go to the links, if any, hold Ctrl and double click on it)

Inspect equipment as per Health and Safety instruction Regulation Document HS38.

After saving the screen will change to that shown below where you can continue to edit further; or remove it; or print it.

Work Order Number **S00110000002**

Work Status **Open**

Copy From Master Safety Instruction

Safety Instruction

Create / Modify a Safety Entry

Details
(to go to the links, if any, hold Ctrl and double click on it)

Inspect equipment as per Health and Safety instruction Regulation Document HS38.

5. Another way is to select one from previously set up **collection** of safety instructions via drop-down list as shown below.

Work Order Number **S00110000002**

Work Status **Open**

Copy From Master Safety Instruction

Safety Instruction

Create / Modify a Safety Entry **SI001 - Safety Ins 001**

Details
(to go to the links, if any, hold Ctrl and double click on it)

After the selection, the screen will change to that shown below where you can continue to edit the details further; or print it; or remove it using the appropriate buttons shown.

Copy From Master Safety Instruction

Safety Instruction **SI001 - Safety Ins 001**

Create / Modify a Safety Entry

Details
(to go to the links, if any, hold Ctrl and double click on it)

1. Try safety

6. Finally, click update button  (the one on the outside of the panel as shown below) to make sure that you save the record.



The screenshot shows a software interface with a grey header bar. In the top right corner of the header bar, there is a button labeled "Update" which is circled in red. Below the header bar, there is a section with a grey background containing the text "500110000002" and "Open □". Below this is a section labeled "by Instruction" with a dropdown menu. Below that is a section labeled "y Entry" with a text area containing the text "Inspect equipment as per Health and Safety instruction Regulation Document HS38.". Below the text area are three buttons: "Update", "Remove", and "Print". At the bottom right of the interface, there is another button labeled "Update" which is also circled in red.

7. Finish.

3.16 How to Add Job Actual to Work Order

Site : Cworks Malaysia

| | | | | | | | | | | | |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|-------------------|------------|
| Work Order | Assign To | Closing | Labour | Direct Issue | Services | Materials | Cost Summary | Job Plan | Safety Instructions | Job Actual | Attachment |
|------------|-----------|---------|--------|--------------|----------|-----------|--------------|----------|---------------------|-------------------|------------|

Work Order Number **S0011000002**

Work Status **Open**

Notes

Figure 36: Work Order – Adding Job Actual Details to Work Order

Here are the steps to add **Job Actual** to work order:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: *The CMMS will refresh the work order listing every time you change the site.*

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Click **Job Actual Tab**  to display it as shown in **Figure 36** above.
4. Enter Job Actual details and save with .
5. Finish.

3.17 How to Add Attachments (Words, Excel and PDF files)

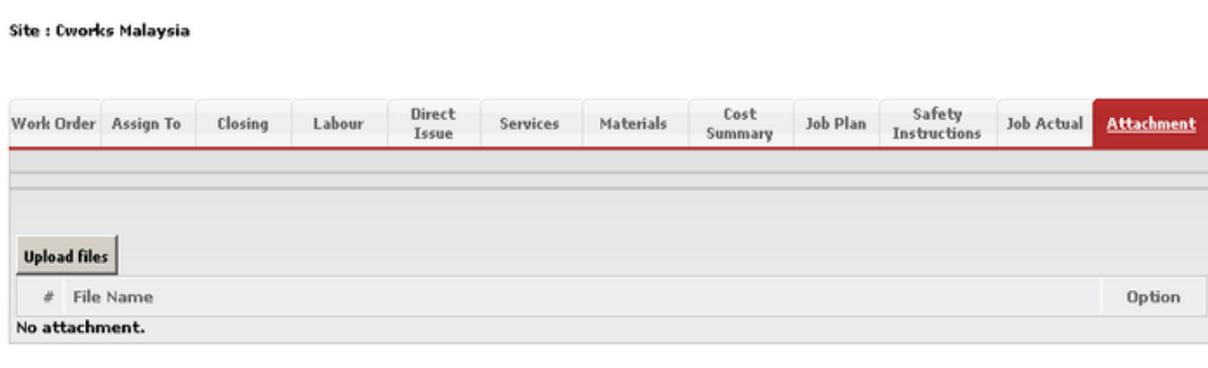


Figure 37: Attaching Words, Excel and PDF files to work orders

Here are the steps to add **Attachment** to work order:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).
Note: *The CMMS will refresh the work order listing every time you change the site.*
2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.
The CMMS will open it in the editing form as shown in **Figure 20**.
Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.
3. Click **Attachment Tab**  to display attach file form as in **Figure 37**.
4. To begin adding attachment, click  button. This will pop up a window where you can browse for the file, select it and upload it using  button.
5. Repeat for all the files that you want to add as attachments.
6. Finish.

3.18 How to Print a Work Order

This section describes how you can print or email a work order. Here are the steps for doing this:

1. Go to the **Work Order Opening screen** shown in **Figure 17** above, where you will find the **work order listing**. Change to the correct **site** containing the target work order if necessary, using the **current site selector** (drop-down list).

Note: *The CMMS will refresh the work order listing every time you change the site.*

2. After selecting the **site**, from the work order listing, you can select and open the target **work order** for editing by clicking on the **work order number**.

The CMMS will open it in the editing form as shown in **Figure 20**.

Note: Alternatively, you can use **search facility** to locate the work order, and open it for editing.

3. Select the **option** you want from the **table** shown below by clicking on its menu icon at the top of the screen.

| No. | Menu Icon | Description |
|-----|--------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. |  Print Work Order 1 | Print the work order for service personnel to take to a job site. It will print the detail of the work requested. You get to preview it before printing. |
| 2. |  Print Work Order 2 | Print the completed work order . You get to preview it before printing. |
| 3. |  Print WO with Attachment | As in (2) above but with file attachment You get to preview it before printing. |
| 4. |  Print WO with PM Attachment | As in (2) above but with PM attachment You get to preview it before printing. |
| 5. |  Email Work Order | Email work order to a recipient. Note: Please make sure that your email service is set up for this purpose. |

4. Finish.

4. ASSETS



ACCESSING ASSETS

You can access **Assets** on **CWorks EASY opening screen** by clicking the **icon** on the left, which will open the **Assets Opening Screen**.

Assets module provides many useful functions that will help you to manage your facilities. Through this module, you can register and record assets and their details that are of interest to maintenance operation. These details include BoM, asset engineering and safety test procedures, technical data, service information, warranties, suppliers, installation dates, etc.

4.1 Assets Opening Screen

Figure 38 below shows the **Assets opening screen**. When users open this screen, the CMMS will automatically list all the assets. From this listing, users can select an asset simply by clicking on the asset number and open it for viewing and editing. In addition creating or editing old asserts, users will also find a comprehensive asset search facility at the base of the screen that could speed up locating a particular asset.

One thing users should bear in mind is that – always check that they are looking at the **correct site**. Use the **current site selector** to change to the site if necessary.

ASSET

 Welcome Admin
 Seconds before redirect: 892
[Change Level](#)


List Asset


New Assets


Import New Assets from MS Excel


Asset Maintenance History


Asset Tree

Site: Cworks Malaysia

| Asset No. | Asset Desc. | Category | Status | Location No. | Location Desc. | Auth. Dept.No. | Auth. Dept.Desc. | Manufacturer | Model No. | Serial No. | Date Commissioned | Date Disposed | Warranty Expiry | BoM No |
|-----------|-------------|-------------------------------|--------|--------------|----------------|----------------|------------------|--------------|-----------|----------------|-------------------|---------------|-----------------|--------|
| 1 | A | Hanging Parts | Active | L002 | Store room | | | | | | | | | |
| 9900-01 | jiva asset | | Active | L001 | Location 1 | | | | | | | | | 8004 |
| A1 | Asset Test | Dispenser Sump | Active | L001 | Location 1 | | | | | | | | | |
| A111 | AssetA111 | □□ - □□ Electrical - Lighting | Active | L001 | Location 1 | | | Malaysia | F78787 | Y6372-09-32032 | 31 January 2009 | | 27 January 2011 | |
| A117 | Asset A117 | | Active | L001 | Location 1 | | | | | | | | | |
| A119 | Asset A119 | Dispenser | Active | L002 | Store room | | | | | | | | | |
| A120 | Asset 120 | | Active | L001 | Location 1 | | | | | | | | | |
| A121 | Asset 121 | | Active | L002 | Store room | | | | | | | | | |
| A122 | Asset 122 | | Active | L002 | Store room | | | | | | 25 November 2010 | | | |
| A123 | Asset 123 | | Active | L001 | Location 1 | | | | | | | | | |

Record(s) : 26
Page 1 of 3 [First](#) [Previous](#) [Next](#) [Last](#)

Search Criteria

[Export to Excel](#)
[Reset](#)
[Search](#)

Asset No. [...](#) [Clear](#)

Asset Description

Asset Status Active [Clear](#)

Asset Category [Clear](#)

Additional Info [Clear](#)

BoM No. [...](#) [Clear](#)

Location No.

Location Desc.

Department [Clear](#)

Manufacturer

Model Number

Serial Number

Warranty Expiry Date From [Clear](#) To [Clear](#)

Date Commissioned From [Clear](#) To [Clear](#)

Date Disposed From [Clear](#) To [Clear](#)

Order By Asset No. Ascending

[Export to Excel](#)
[Reset](#)
[Search](#)

Figure 38: Assets Opening Screen



Figure 39: Assets Menu

For working with Assets, the opening screen features a set of menu items as shown in **Figure 39** above. The table below gives a brief description of each menu item.

| Assets Menu on the Opening Screen | | |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| 1. |  List Asset | Click this icon to go to the Assets Opening Screen and automatically display the Asset listing. |
| 2. |  New Assets | Click this icon to open new asset registration form |
| 3. |  Import New Assets from MS Excel | Click this icon to import Assets into CMMS database using MS Excel spreadsheet (must conform to specific csv format or template). |
| 4. |  Asset Maintenance History | Click this icon to view Assets Maintenance history |
| 5. |  Asset Tree | Click this icon to get the tree-view display of Assets at the current work site |



Figure 40: Assets Hierarchy Tree View

Asset Hierarchy Tree view gives an alternative view of the organization of your assets – for the current site.

4.2 How to Add New Asset

Site : Cworks Malaysia

Current Asset

save

Primary Information

Asset Number: ASS-3005

Asset Description: Air Conditioning Unit

Asset Category: Business & Meeting Room E

Location: L001 - Location 1 **Clear**

Location Department: D001 - Department 1

Auth. Department: D001 - Department 1 **Clear**

Auth. Employee: 001 - Nurul Huda Mat Yunus **Clear**

Contractor: 009 - JY International Berhad-1 尚万喜 **Clear**

Asset Status: Active

Criticality: Normal

Statutory Req.: No

Warranty/Contract: Warranty

Warranty Expiry Date: 8 March 2012 **Clear**

Notes To Technician: Follow full safety procedure per ENGPRO-091.

Warranty / Contract Notes: Full on-site warranty by supplier

Asset Notes: Health and Safety check required every 3 months to prevent from any bacterial infection to employees on the premises.

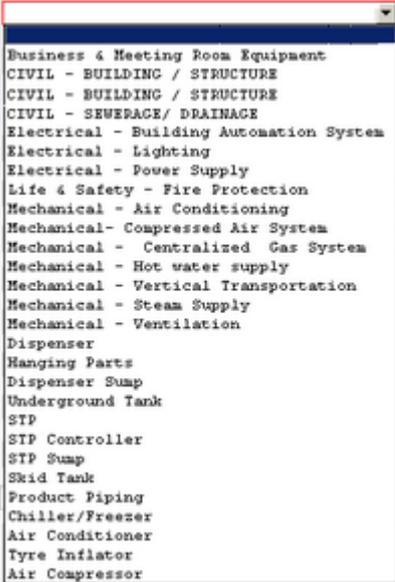
Product Information

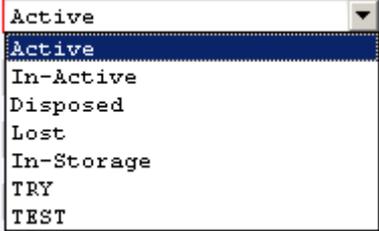
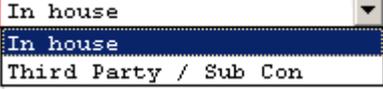
| | |
|------------------------------|----------------------------------------------|
| Manufacturer: ACS0N | Model Number: QTP-3000 |
| Serial Number: 13990278 | Supplier: 010 - RHB Capita Clear |
| Purchase Price: 0.00 | Date Delivered: 6 March 2011 Clear |
| Estimated Life (years): 5.00 | Date Commissioned: 6 March 2011 Clear |
| Current Value: 1.00 | Date Disposed: 8 March 2015 Clear |
| Electrical Spec.: EE78 | Mechanical Spec.: MHT 1378 |

save

Figure 41: Adding New Asset Form

The table below gives a field-by-field description.

| No. | Field Name | Description |
|-----|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Asset Number | A unique identification number |
| 2. | Asset Description | Description of this asset |
| 3. | Asset Category | <p>Select an asset category from a drop-down list shown below.</p>  |
| 4. | Location | <p>Select a location from a pop-up list of locations as shown below. Click the ellipsis button, , to see this list.</p>  <p>To pick a location, click on the location number in column one in the pop-up list.</p> |
| 5. | Location Department | This field will be automatically filled when the location in table row-4 above has been selected. |
| 6. | Auth. Department | The authorizing Department |
| 7. | Auth. Employee | The authorizing employee |
| 8. | Contractor | Name of the contractor |

| | | |
|-----|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| 9. | Asset Status | <p>Select one from the list of status shown below.</p>  |
| 10. | Criticality | <p>Select one from the list below.</p>  |
| 11. | Statutory Req. | <p>Select one from the list below.</p>  |
| 12. | Warranty/Contract | <p>Select one from the list below.</p>  |
| 13. | Warranty Expiry Date |  Set the date when the warranty on the asset will expire. |
| 14. | Maintenance | <p>Select the source of the service maintenance</p>  |
| 15. | Notes to Technician | Notes for the technician |
| 16. | Warranty/Contract Notes | Notes on the warranty or contract |
| 17. | Asset Notes | Notes on asset |
| 18. | Manufacturer | Name of the manufacturer |
| 19. | Serial Number | Serial number of the asset |
| 20. | Purchase Price | Equipment Purchase Price |
| 21. | Estimated Life(years) | Estimated service life span |

| | | |
|-----|-------------------|-------------------------------------------------------------------------------------------------------------------------------|
| 22. | Current Value | Present monetary worth |
| 23. | Electrical Spec. | Electrical Engineering Specification, etc. |
| 24. | Model Number | Asset Model number |
| 25. | Supplier | Name of supplier |
| 26. | Date Delivered |  Date of delivery |
| 27. | Date Commissioned |  Date of when the asset is commissioned. |
| 28. | Date Disposed |  Date when the asset will terminate services |
| 29. | Mechanical Spec. | Mechanical Engineering Specification if any |

Here are the steps for adding **new Asset**:

1. On the **Asset Opening Screen** of **Figure 38**, set the **site** for the new asset using **current site selector**. Consequently, the CMMS will refresh the asset listing accordingly.
2. Click the icon below to open a new **Asset form** as shown in **Figure 41** above.



3. Fill in the **Asset Number**.
4. Fill in Asset **Description**.
5. Use the drop-down list to select the asset **category**.
6. Click the ellipsis button to select **location**.

Note: The CMMS will automatically fill the Location Department after you made the location selection.

7. Click the ellipsis button, , to select the **Auth. Department**.
8. Click the ellipsis button, , to select the **Auth. Employee**.
9. Click the ellipsis button, , to select the **contractor**.
10. Use the drop-down list to select the Asset Status.
11. Use the drop-down list to set the **criticality**.

12. Use the drop-down list to select the **Statutory Req.**
13. Use the drop-down list to select the **warranty/contract** field.
14. Set the **Warranty Expiry Date** using the date function icon, .
15. Use the drop-down list to set the Maintenance field.
16. Fill in the text are for the **Notes to Technician.**
17. Fill in the **Warranty/Contract Notes** field.
18. Fill in the **Asset Notes** field.
19. Fill in the fields in the **Production information** section shown below including the date fields.

| Product Information | | | |
|------------------------|----------------------|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Manufacturer | <input type="text"/> | Model Number | <input type="text"/> |
| Serial Number | <input type="text"/> | Supplier | <input type="text"/> ... <input type="button" value="Clear"/> |
| Purchase Price | <input type="text"/> | Date Delivered | <input type="text"/>  <input type="button" value="Clear"/> |
| Estimated Life (years) | <input type="text"/> | Date Commissioned | <input type="text"/>  <input type="button" value="Clear"/> |
| Current Value | <input type="text"/> | Date Disposed | <input type="text"/>  <input type="button" value="Clear"/> |
| Electrical Spec. | <input type="text"/> | Mechanical Spec. | <input type="text"/> |

20. Click to save the new asset record.

Immediately, the CMMS will change the screen to the **Asset Editing screen** as shown below. You can continue to input further details on the other tabs.

Site : Cworks Malaysia

Successfully added record 8 March 2011 15:18

Duplicate Asset update

Primary Information

Asset Number: ASS-3005 change

Asset Description: Air Conditioning Unit

Asset Category: Business & Meeting Room E

Location: L001 - Location 1

Location Department: D001 - Department 1

Auth. Department: D001 - Department 1 ... Clear

Auth. Employee: 001 - Nurul Hada Mat Yunus ... Clear

Contractor: 009 - JI International Berhad-1陶万泰 ... Clear

Asset Status: Active

Criticality: Normal

Statutory Req.: No

Warranty/Contract: Warranty

Warranty Expiry Date: 8 March 2012 Clear

Maintenance: Third Party / Sub Con

Notes To Technician: Follow full safety procedure per ENGPRO-091.

Warranty / Contract Notes: Full on-site warranty by supplier

Asset Notes: Health and Safety check required every 3 months to prevent from any bacterial infection to employees on the premises.

Product Information

Manufacturer: ACSON Model Number: QTP-3000

Serial Number: 13990278 Supplier: 010 - RHE Capita ... Clear

Purchase Price: 0.0000 Date Delivered: 6 March 2011 Clear

Estimated Life (years): 5 Date Commissioned: 6 March 2011 Clear

Current Value: 1.00 Date Disposed: 8 March 2015 Clear

Electrical Spec.: EE78 Mechanical Spec.: MHT 1378

Work Orders

Last WO: Date: WO Status: WO Type:

Duplicate Asset update

21. Finish.

4.3 How to View and Modify Existing Assets Details

Figure 42 shows **Current Asset form**, where you can view and edit the details of an asset. At the top of the form, there are four menu icons as shown below for navigation. Under the navigation icons, is the **current site selector** for users to select specific site.

CURRENT ASSET


List Asset


New Assets


Import New Assets from MS Excel


Print Barcode

Site : Cworks Malaysia

| | | | | | | | | |
|---------------|-----------------|--------------------|--------------------|--------------|----------|-----|------------|------------|
| Current Asset | Additional Info | Work Order History | Work Child History | Relationship | Transfer | BOM | Attachment | PM Details |
|---------------|-----------------|--------------------|--------------------|--------------|----------|-----|------------|------------|

Successfully added record 8 March 2011 15:18

Duplicate Asset
update

Primary Information

| | | | |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|--------------------------------------|
| Asset Number | <input type="text" value="ASS-3005"/> | <input type="button" value="change"/> | |
| Asset Description | <input type="text" value="Air Conditioning Unit"/> | | |
| Asset Category | <input type="text" value="Business & Meeting Room E"/> | | |
| Location | <input type="text" value="L001 - Location 1"/> | | |
| Location Department | <input type="text" value="D001 - Department 1"/> | | |
| Auth. Department | <input type="text" value="D001 - Department 1"/> | ... | <input type="button" value="Clear"/> |
| Auth. Employee | <input type="text" value="001 - Nurul Hada Mat Yunus"/> | ... | <input type="button" value="Clear"/> |
| Contractor | <input type="text" value="009 - JT International Berhad-1陶万善"/> | ... | <input type="button" value="Clear"/> |
| Asset Status | <input type="text" value="Active"/> | | |
| Criticality | <input type="text" value="Normal"/> | | |
| Statutory Req. | <input type="text" value="No"/> | | |
| Warranty/Contract | <input type="text" value="Warranty"/> | | |
| Warranty Expiry Date | <input type="text" value="8 March 2012"/> | <input type="button" value="Clear"/> | <input type="button" value="Clear"/> |
| Maintenance | <input type="text" value="Third Party / Sub Con"/> | | |
| Notes To Technician | <input type="text" value="Follow full safety procedure per ENCPRO-091."/> | | |
| Warranty / Contract Notes | <input type="text" value="Full on-site warranty by supplier"/> | | |
| Asset Notes | <input type="text" value="Health and Safety check required every 3 months to prevent from any bacterial infection to employees on the premises."/> | | |

Product Information

| | | | |
|------------------------|---------------------------------------|-------------------|------------------------------------------------------------------------------------|
| Manufacturer | <input type="text" value="ACSON"/> | Model Number | <input type="text" value="QTP-3000"/> |
| Serial Number | <input type="text" value="13990278"/> | Supplier | <input type="text" value="010 - PHE Capita"/> <input type="button" value="Clear"/> |
| Purchase Price | <input type="text" value="0.0000"/> | Date Delivered | <input type="text" value="6 March 2011"/> <input type="button" value="Clear"/> |
| Estimated Life (years) | <input type="text" value="5"/> | Date Commissioned | <input type="text" value="6 March 2011"/> <input type="button" value="Clear"/> |
| Current Value | 1.00 | Date Disposed | <input type="text" value="8 March 2015"/> <input type="button" value="Clear"/> |
| Electrical Spec. | <input type="text" value="EE78"/> | Mechanical Spec. | <input type="text" value="MHT 1378"/> |

Work Orders

| Last WO | Date |
|-----------|---------|
| WO Status | WO Type |

Duplicate Asset
update

Figure 42: Current Asset Screen – for editing Existing Asset Details

| | Menu Icon | Description |
|----|----------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| 1. |  List Asset | Click on this icon to return to Assets LISTING screen. |
| 2. |  New Assets | Click this icon to create a new asset. |
| 3. |  Import New Assets from MS Excel | Allows assets to be imported via Excel Spreadsheet based on specific csv importing format or template. |
| 4. |  Print Barcode | Print Bar codes |

To open and modify an existing asset the steps are as follows:

1. On the **Assets opening screen** of **Figure 38**, select the **site** of the asset using the **current site selector**. This will force the asset listing to be refreshed.
2. Scroll through the asset listing, or use asset search facility to locate the asset to open for editing.
3. Click the **Asset Number** to open it as in **Figure 42** in **Current Asset Edit Form**.
4. Edit the details as appropriate on one or more tabs.
5. Click  to save any changes to the asset.
6. On the other hand, if you would like to create a new asset by duplicating the existing record, click the  button. This button will clone this asset record and open it in a new asset form, ready for you to edit.
7. Finish.

4.3.1 How to Use Additional Info Tab

This tab allows you to view, add, edit or delete a set of information fields where you can store additional information on the asset. **Figure 43** shows the **Additional Info form**. Make sure to you click  after you make any changes.

The screenshot shows the 'Additional Info' form for asset HUA0021. The form has a red header with 'CURRENT ASSET' and 'Open Requests : 6'. Below the header are icons for 'List Asset', 'New Assets', 'Import New Assets from MS Excel', and 'Print Barcode'. The site is 'ENGINEERING'. The 'Additional Info' tab is selected, showing 20 input fields for additional information. There are 'Duplicate Asset' and 'update' buttons at the bottom right.

Figure 43: Additional Information Form

4.3.2 How to Use Work Order History Tab

This tab allows you to view the **Work Order History** of this asset as shown in **Figure 44**. The tab also features a facility to export the details to Excel file with just a single click of the export button. At a glance, you can see the breakdown on the cost and the total number of man-hours spent on a work order.

Site : ENGINEERING

Current Asset | Additional Info | **Work Order History** | Work Child History | Relationship | Transfer | BOM | Attachment | PM Details

Duplicate Asset | update

Asset Number HUA0021

Page 4 of 15 First Previous Next Last

| # | Work Order Number | Status | Received Date | Problem Description | Action Taken | Start Date | End Date | Part Cost | Total Man Hours |
|----|-------------------|--------|-----------------------|---------------------|--------------|------------|----------|-----------|-----------------|
| 31 | PMENG10000447 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 32 | PMENG10000448 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 33 | PMENG10000449 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 34 | PMENG10000450 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 35 | PMENG10000451 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 36 | PMENG10000452 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 37 | PMENG10000453 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 38 | PMENG10000454 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 39 | PMENG10000455 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |
| 40 | PMENG10000456 | Open | 29 October 2010 14:40 | Meter1 | | | | 0.00 | 0.00 |

149 record/s Page 4 of 15 First Previous Next Last

Export To Excel

Total Part Cost 20.00
 Total Direct Issue Cost 0.00
 Total Labor Cost 0.00
 Grand Total 20.00
 Total Man Hrs 0.00

Duplicate Asset | update

Figure 44: Work Order History

4.3.3 How to Use Work Order Child History Tab

This tab is for viewing the **Work Order Child History**. It is similar to **Work Order History Tab** above except that this belongs to its child asset. The output can be exported as an Excel file.

To view one or more **Work Order Child History** the steps are:

1. Referring to **Figure 45**, select **Child Asset Number** as shown here.

Site : ENGINEERING

Current Asset | Additional Info | Work Order History | **Work Child History** | Relationship

Asset Number HUA0021

Child Asset Number

| # | Work Order Number | Status | Received Date | Problem Description | Action Taken |
|---|-------------------|-----------|----------------------|---------------------|--------------|
| 1 | PMENG10000049 | Cancelled | 26 August 2010 11:11 | test | |

After the selection, the screen will display the **Work Order Child History** for this child asset.

2. Repeat step (1) above for the history of another child.
3. Finish.

CURRENT ASSET
Open Requests : 6
Welcome Admin
Seconds before redirect: 897
[Change Level](#)


List Asset


New Assets


Import New Assets from MS Excel


Print Barcode

Site : ENGINEERING

Current Asset
Additional Info
Work Order History
Work Child History
Relationship
Transfer
BOM
Attachment
PM Details

Duplicate Asset update

Asset Number HUA0021

Child Asset Number HUA003

| # | Work Order Number | Status | Received Date | Problem Description | Action Taken | Start Date | End Date | Part Cost | Total Man Hours |
|----|-------------------|-----------|------------------------|---------------------|--------------|----------------------|----------------------|-----------|-----------------|
| 1 | PMENG10000049 | Cancelled | 26 August 2010 11:11 | test | | | | 0.00 | 0.00 |
| 2 | PMENG10000054 | Closed | 26 August 2010 11:20 | test | | 26 August 2010 18:00 | 26 August 2010 20:00 | 0.00 | 0.00 |
| 3 | PMENG10000194 | Open | 1 September 2010 12:34 | TEST0826 | | | | 0.00 | 0.00 |
| 4 | PMENG10000195 | Open | 1 September 2010 12:34 | TEST0826 | | | | 0.00 | 0.00 |
| 5 | PMENG10000196 | Open | 1 September 2010 12:34 | TEST0826 | | | | 0.00 | 0.00 |
| 6 | PMENG10000197 | Open | 1 September 2010 12:34 | TEST0826 | | | | 0.00 | 0.00 |
| 7 | PMENG10000198 | Open | 1 September 2010 12:34 | TEST0826 | | | | 0.00 | 0.00 |
| 8 | PMENG10000199 | Open | 1 September 2010 12:34 | TEST0826 | | | | 0.00 | 0.00 |
| 9 | PMENG10000200 | Open | 1 September 2010 12:34 | TEST0826 | | | | 0.00 | 0.00 |
| 10 | PMENG10000201 | Open | 1 September 2010 12:34 | TEST0826 | | | | 0.00 | 0.00 |

62 record/s
Page 1 of 7 [First](#) [Previous](#) [Next](#) [Last](#)

Export To Excel

Total Part Cost 0.00

Total Direct Issue Cost 20.00

Total Labor Cost 0.00

Grand Total 20.00

Total Man Hrs 342.00

Duplicate Asset update

Figure 45: Work Order Child History

4.3.4 How to Use Relationship Tab

This tab is for adding **child assets** or **children** to the **current asset**. Consequently, the addition of these children promotes the **current asset status** to the higher **Parent Asset status**.

To add a series of assets as **child assets** to **Current Asset** the steps are as follows:

1. Refer to **Figure 46**, add an asset and click **submit**.
As the consequence, the asset becomes part of the **list of children assets**.
2. Repeat adding **child assets** until you finish.
3. Finish.

CURRENT ASSET Open Requests : 6 Welcome Admin
Seconds before redirect: 896
[Change Level](#)

List Asset New Assets Import New Assets from MS Excel Print Barcode

Site : ENGINEERING

Current Asset Additional Info Work Order History Work Child History **Relationship** Transfer BOM Attachment PM Details

Duplicate Asset update

Asset Number: HUA0021

Parent: HUA001-Asset H 1

Child: ... Clear

Submit ▼

| Child | Description | Option |
|--------|-----------------|--------|
| HUA003 | Asset H 3 | Remove |
| AS11 | Asset Satu-Satu | Remove |

Duplicate Asset update

Figure 46: Adding Child Assets to Current Asset via Relationship Tab

The **Current Asset** will appear as **Parent asset** whenever you open any of the **children Asset**. After adding the **children assets**, you can check that the children are added to the current asset as follows:

1. On the Current Asset screen, click Work Child History tab.
2. Select **Child Asset Number** from drop-down list.
This forces the screen to update and you should see details of the **Work Order history** for the child.
Thus, confirming that this child is in current asset.
3. Finish.

This short section gives a brief overview on the subject of Parent, child and sibling relationships. Some assets may be part of assets hierarchy, in that it is a child of an asset and a sibling of another. This relationship information is particularly important for some reasons and there are many reasons why an organization wants to have and maintain such relationship.

Following is an example of a Relationship tree.

EXAMPLE:

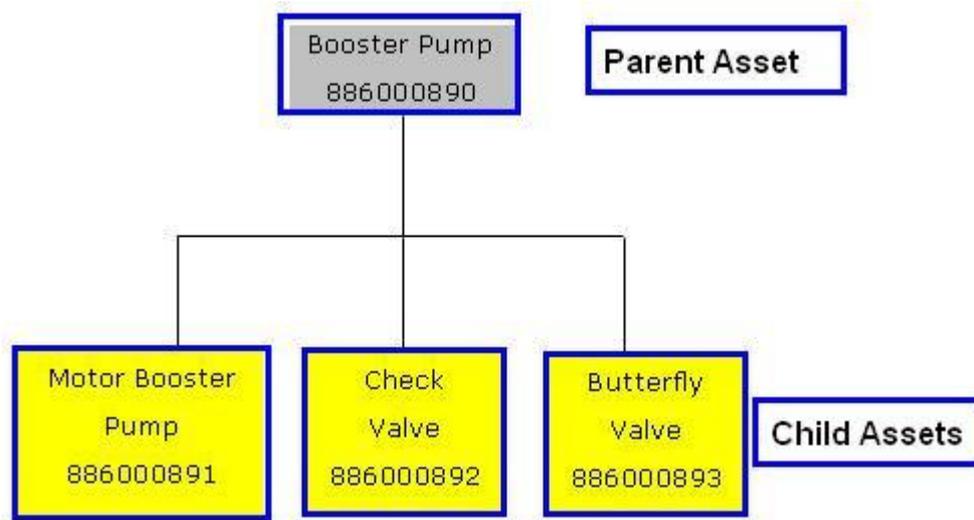


Figure 47: Example of Asset Relationships

Screen Representation: Assets 886000891, 886000892 & 886000893 are children assets of the parent asset 886000890.

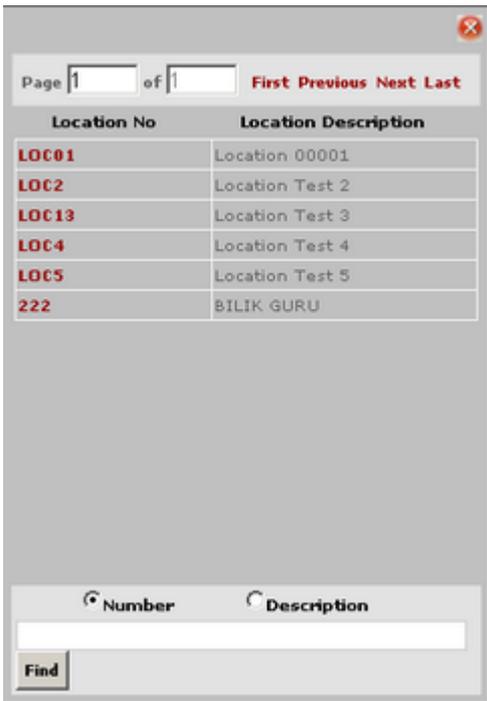
4.3.5 How to Use Transfer Tab

The **Transfer tab** is for transferring **Current Asset** (the asset you are looking at now) from the present **site** to another **destination site or location**. In addition, not only can we transfer this current asset but also place it under a **new parent at the destination**. The CMMS will record this transfer and you can view the detail of the transfer in the **transfer history listing** at the bottom of the transfer form, after the transfer.

To transfer the **current asset** to another **site or location** the steps are as follows:

1. Referring to **Figure 48**, select the destination **site** as shown here.

2. Select a **new location** using . You will see a dialog as shown below from which you can click on the location number to make the selection.



| Location No | Location Description |
|-------------|----------------------|
| LOC01 | Location 00001 |
| LOC2 | Location Test 2 |
| LOC13 | Location Test 3 |
| LOC4 | Location Test 4 |
| LOC5 | Location Test 5 |
| 222 | BILIK GURU |

3. Select a **new Parent asset** using . You will see a dialog as shown below from which you can click on the asset number to make the selection.



| Asset No | Asset Description |
|----------|-------------------|
| AST001 | asset 0001 |
| T0001 | Test 0001 |
| T0002 | test asset 0002 |
| T3 | test asset 3 |
| HUA0021 | Asset H 2 |
| HUA003 | Asset H 3 |
| HUA004 | Asset H 4 |
| A001 | Air Conditioning |
| B001 | B001 |
| AS11 | Asset Satu-Satu |

4. Finally, you click the transfer button as shown below to activate the transfer.

Note: If an asset is child or parent asset for other assets, then it will detach the parent and carry the child's to new location.

Transfer ▼

5. Finish.

CURRENT ASSET Open Requests : 6 Welcome Admin
Seconds before redirect: 903
[Change Level](#)

List Asset
 New Assets
 Import New Assets from MS Excel
 Print Barcode

Site : ENGINEERING

Current Asset Additional Info Work Order History Work Child History Relationship **Transfer** BOM Attachment PM Details

Duplicate Asset update

Asset Number: HUA0021
Current Location: LOC2

Transfer To A New Location

New Site: ENGINEERING

New Location: ... Clear

New Parent Asset: ... Clear

Remarks:

Note: If an asset is child or parent asset for other assets, then it will detach the parent and carry the child's to new location.

Transfer ▼

Transfer History

| Transfer Date | From Site | From Location | From Parent | Remarks |
|---------------------|-----------|---------------|-------------|---------|
| 2010-08-12 00:00:00 | ENG | LOC13 | | |

Duplicate Asset update

Figure 48: Transferring An Asset to a different Site and/or Location

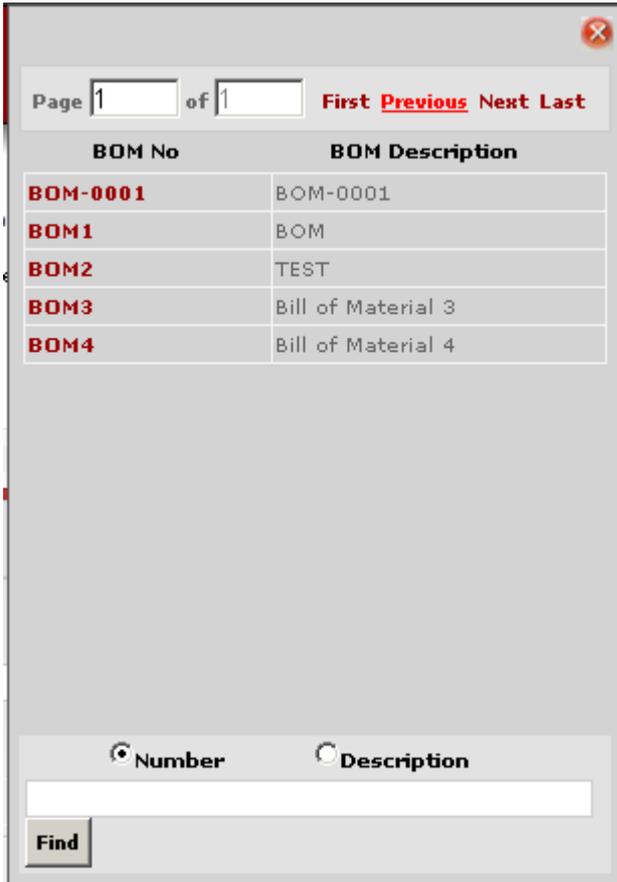
4.3.6 How to Use BOM Tab

The **BOM tab** is for selecting a single **BOM** from the list of prepared **Bill of Materials (BoM)** and assigning it to the **current asset**. Using the form below, you can select one BoM from drop-down list of BOMs and assign it to this asset.

*Note: You can only add one BoM to **current asset**. If you select another BOM, it will replace the old one.*

To select a BoM from a list of BoM to assign to **current asset** the steps are:

1. Referring to **Figure 49**, select a **BoM Number** to assign to current asset by clicking the ellipsis button . Subsequently, this will open **selection dialog pane** as shown below.



Click on the **BOM Number** to make the selection. After the selection, the **Current BoM List** will display the materials for this asset as shown below.

| BoM Description | | Bill of Material 3 | |
|------------------|------------------|----------------------------|---------------|
| Current BoM List | | | |
| # | Part Number | Part Description | Part Quantity |
| 1 | ECP-QP-080041-WO | HEATER ELEMENT 10KW-WO | 2 |
| 2 | ECP-QP-080064-WO | 40IH GASKET 1.5 5540325-WO | 5 |

- Click to update **current asset**.

Note: You can select only one BoM for current asset. Selecting another BOM, will replace the old one.

- Finish.

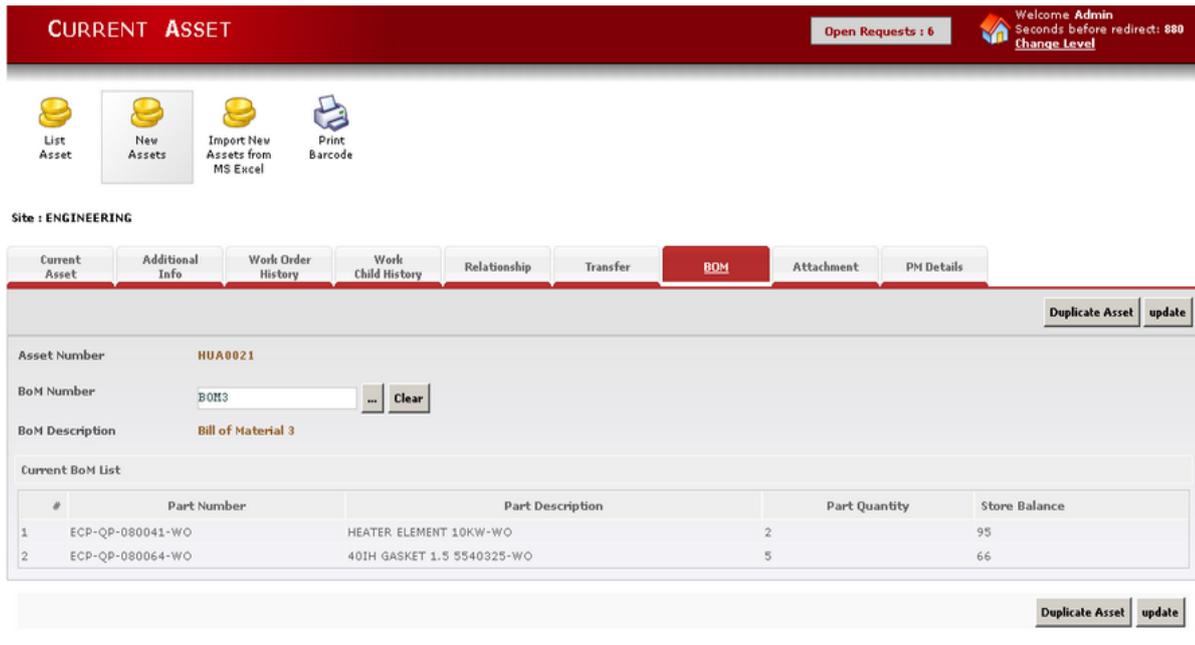


Figure 49: Selecting a BoM to assign to Current Asset

4.3.7 How to Use Attachments Tab

The **Attachments tab** is for uploading and attaching one or more files to this asset.

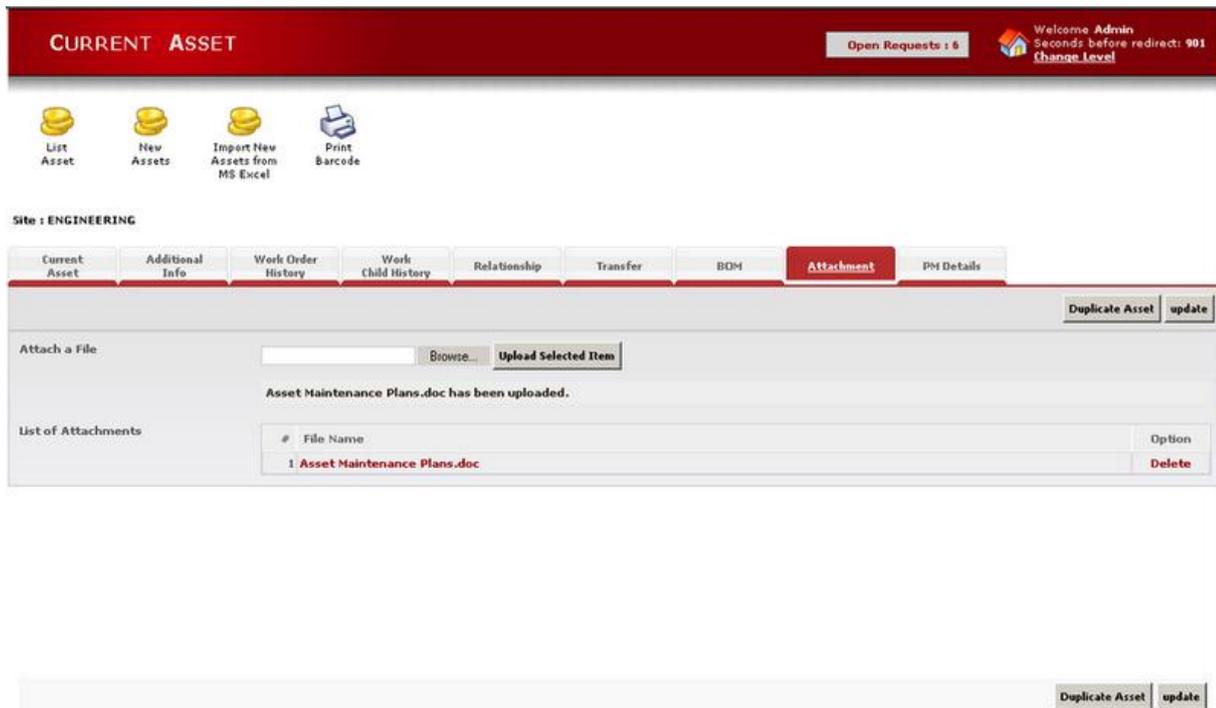
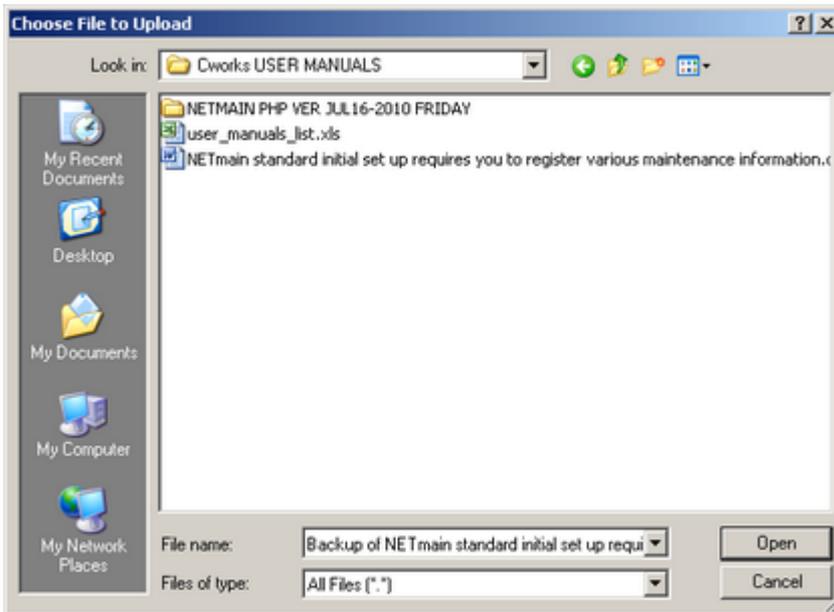


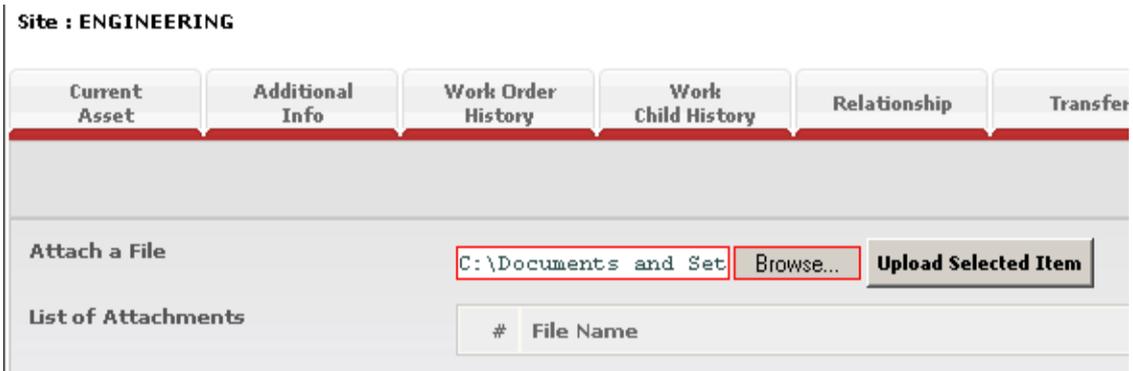
Figure 50: Attaching Files to Current Asset

Here are the steps are to attach one or more files to this asset:

1. Referring to **Figure 50**, click **Browse...** to open the dialog pane as shown below.

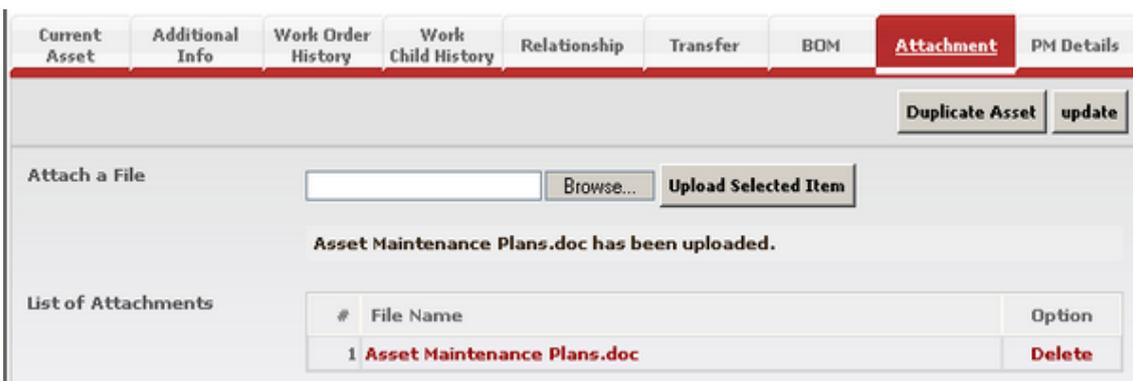


Next, browse and select the target file. This will load filename into the field as shown below.

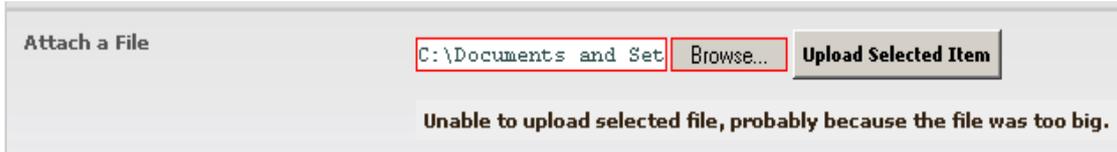


2. Begin the upload by clicking the **Upload Selected Item** button.

After the upload is complete, the filename name will appear in the listing as shown below.



However, if the file is too big to upload as attachment, you will get the message below.



3. Repeat the above process until all your files are uploaded.
4. Finish.

4.3.8 How to Use PM Details Tab

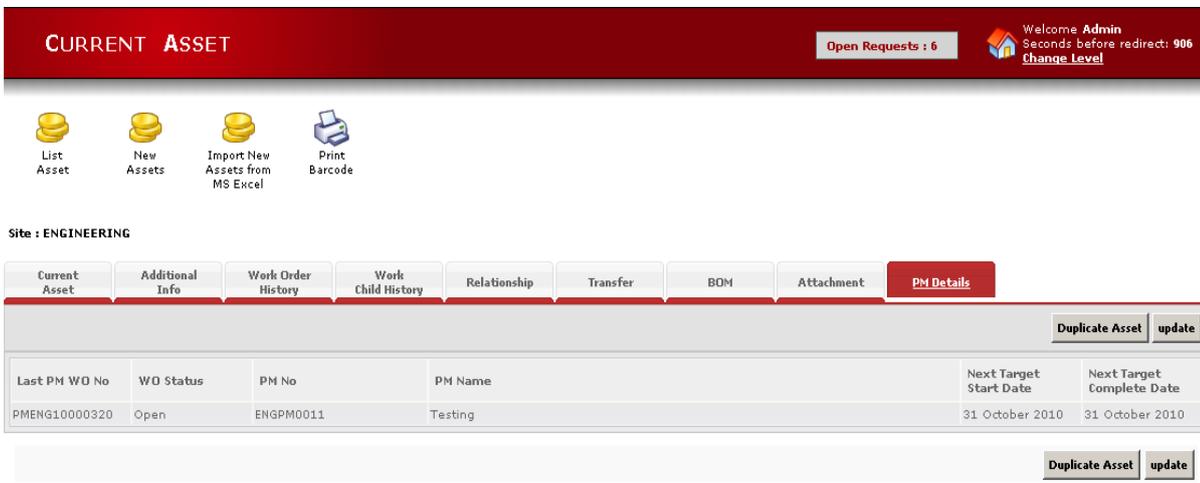
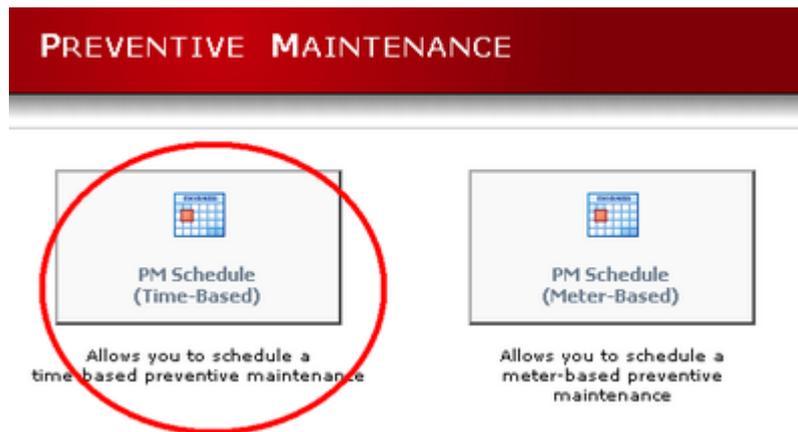


Figure 51: PM Details

Notes

- This description strictly applies to **time-based PM** (Preventive Maintenance) that is set up using the circled time-based PM menu icon below. This is marked by the absence of

the 'Meter Reading Tab' to the right of the 'PM Details Tab'.



When you click **PM Details Tab**, the CMMS will display the detail of the **last Work Order** generated in connection with the PM of this asset. This detail will include the serial number of the Work Order, its status (opened, closed, cancelled, etc), the name of PM that generates it, and the next PM start and completion dates.

4.3.9 How to Use Meter Reading Tab

Meter Reading Tab is for viewing and/or recording readings of meters connected to this asset.

Note

A **meter-based PM** (Preventive Maintenance) is distinguished by the presence of '**Meter Reading Tab**' to the right of '**PM Detail Tab**' as shown below. This tab can be seen immediately after opening an asset for editing or viewing.



A **meter-based PM** (Preventive Maintenance) is set up using the circled menu icon below.

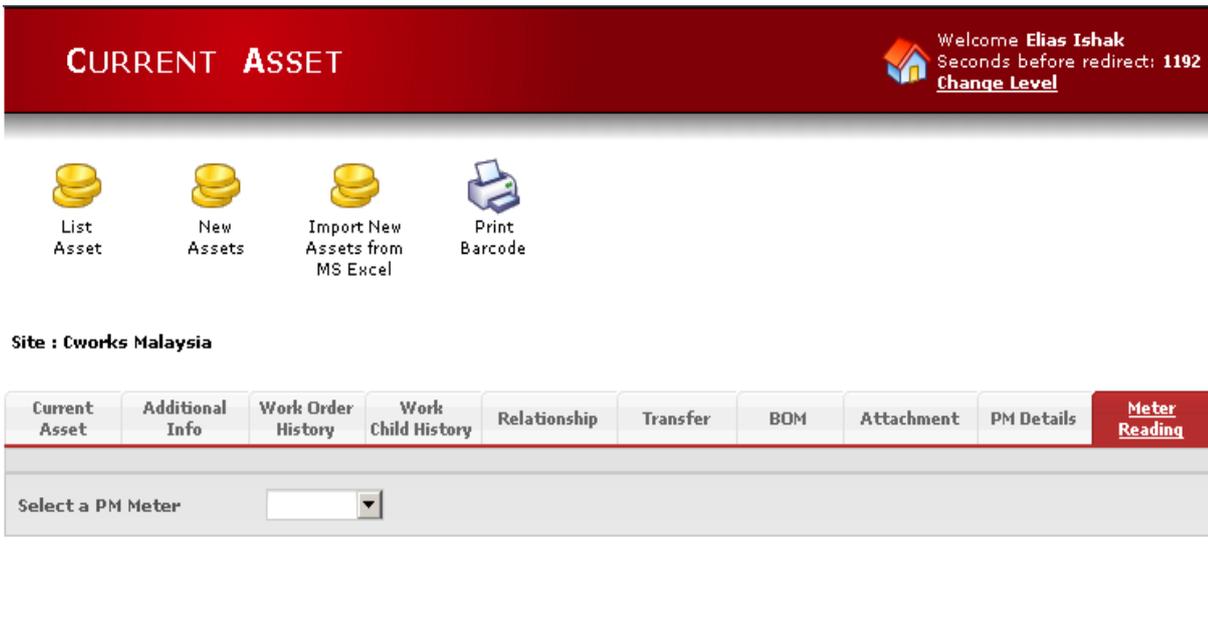
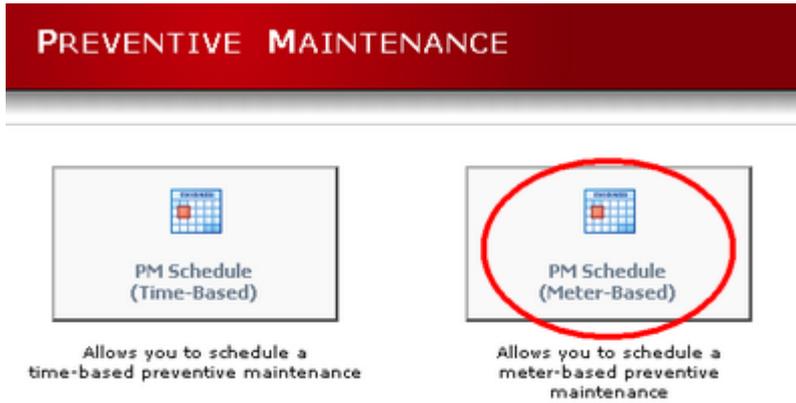


Figure 52: Meter Reading Tab

When you click the **Meter Reading Tab**, the CMMS will display the form shown above in **Figure 52**.

Site : Cworks Malaysia

| Current Asset | Additional Info | Work Order History | Work Child History | Relationship | Transfer | BOM | Attachment | PM Details | Meter Reading |
|-------------------------------------------------------------------------------------------------------------------------|-----------------|--------------------|--------------------|-----------------|-----------------|-----------|------------|------------|---------------|
| Select a PM Meter <input type="text" value="Meter 1"/> | | | | | | | | | |
| Current Reading <input type="text" value=""/> Hours | | | | | | | | | |
| Reading Date <input type="text" value=""/> <input type="button" value="Calendar"/> <input type="button" value="Clear"/> | | | | | | | | | |
| <input type="button" value="Save"/> | | | | | | | | | |
| PM Meter Details | | | | | | | | | |
| Work Trade | TM - Electrical | | | Asset No. | A117 Asset A117 | | | | |
| Meter Type | Incremental | | | Location No. | L001 Location 1 | | | | |
| Last Work Order | | | | PM Type | Schedule | | | | |
| Reading | | | | | | | | | |
| Frequency | Start Reading | Last Reading | | Expected PM Due | | | | | |
| 30 Hours | 1 Hours | 1 Hours | | 31 Hours | | | | | |
| Meter History | | | | | | | | | |
| # | Reading Date | Meter No. | Curr. Reading | Gen. Status | Active Status | Gen. Date | | | |

Figure 53: Meter Details

Here are the steps to record a specific meter reading:

1. (Refer to **Figure 52** above)
 To select the meter connected with the meter reading, click '**Select a PM Meter**' drop-down list. From the list, select the meter. This will result in the display of the meter details as shown in **Figure 53** above.
2. Input the meter reading into **Current Reading** field.
3. Select the date using the calendar icon, . After inputting the date, you will get something similar to that shown below.

| | |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Select a PM Meter | <input type="text" value="Meter 1"/> |
| Current Reading | <input type="text" value="8"/> Hours |
| Reading Date | <input type="text" value="10 March 2011 16:11"/> <input type="button" value="Calendar"/> <input type="button" value="Clear"/> |
| <input type="button" value="Save"/> | |

- Click the **Save** button, , and you should see the new meter reading listed as shown below, at the bottom of the figure.

Site : Cworks Malaysia

| Current Asset | Additional Info | Work Order History | Work Child History | Relationship | Transfer | BOM | Attachment | PM Details | Meter Reading |
|---------------------------------------------------------------------------------|---------------------|--------------------|--------------------|--------------|---------------|-----------------|------------|------------|---------------|
| Successfully added record | | | | | | | | | |
| Select a PM Meter <input type="text" value="Meter 1"/> | | | | | | | | | |
| Current Reading <input type="text" value=""/> Hours | | | | | | | | | |
| Reading Date <input type="text" value=""/> <input type="button" value="Clear"/> | | | | | | | | | |
| <input type="button" value="Save"/> | | | | | | | | | |
| PM Meter Details | | | | | | | | | |
| Work Trade | | TM - Electrical | | Asset No. | | A117 Asset A117 | | | |
| Meter Type | | Incremental | | Location No. | | L001 Location 1 | | | |
| Last Work Order | | | | PM Type | | Schedule | | | |
| Reading | | | | | | | | | |
| Frequency | | Start Reading | | Last Reading | | Expected PM Due | | | |
| 30 Hours | | 1 Hours | | 8 Hours | | 31 Hours | | | |
| Meter History | | | | | | | | | |
| # | Reading Date | Meter No. | Curr. Reading | Gen. Status | Active Status | Gen. Date | | | |
| 1 | 2011-03-10 16:11:00 | amtr117 | 8 | No | Yes | | | | |
| 2 | 2011-03-10 16:10:00 | amtr117 | 5 | No | Yes | | | | |

Note: As the meter reading has not yet reach or exceed 31 hours – for the next pm, the **Gen. Status** read 'No'.

- Repeat the above process, if there are more readings to record.
- Finish.

4.3.10 How to Duplicate Existing Asset Details to New Assets

This feature is part of **Current Asset** and its usefulness will become obvious when you want to create several Asset records that are almost similar but not exactly. What it allows you to do is **duplicate existing asset details** to new asset form, from which you can make minor

modification accordingly, and finish up with a new asset that you want. It definitely speeds up creating almost similar assets and saves you precious time.

Here are the steps to duplicate the details in existing asset to new asset:

1. On **Assets opening screen** of **Figure 38**, select the **asset** you want to duplicate from **asset listing** by clicking the **asset number**. Consequently, this will open and load the **asset details** into **current asset editing form**.
2. Click  button to duplicates the asset details to **new asset form**.
3. Edit asset details as required and click  to save it.
4. Subsequently, the CMMS will save the asset and load it into **asset editing form** ready for further editing.
5. Finish.

4.3.11 How to Print Bar Codes



This utility is pending implementation.

Here is how to print asset details:

1. On the **Assets opening screen** of **Figure 38**, select the site where the asset is, using **current site selector**. This will refresh the asset listing.
2. Select asset from asset listing by clicking on asset number.



3. Click
4. Finish.

4.4 How to Import Assets Using MS Excel Template-File Based Format



The **Import New Assets from MS Excel icon** above allows users to import assets directly into CMMS database using **MS Excel file** that conforms to a **template-file import format**. This template file is available to all customers. Figure 54 below shows the form for importing via the MS Excel file.



Figure 54: Importing Assets via the MS Excel Template-File based Format

Here are the steps to import assets into CMMS database using the MS Excel:

1. Go to **Assets opening screen** shown in **Figure 38**. Click  to open the import form as shown in **Figure 54** above.
2. Click the browse button, , and browse to the **MS Excel file** containing the assets, and select it. After the selection, the **filename** will appear in the input field shown below.



Make sure to select CSV file type. Otherwise, the CMMS will display the message shown

below.

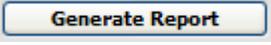


- 3. Click import to begin importing the assets.
- 4. Finish.

4.5 How to Use Asset Maintenance History

A screenshot of the "Asset History Report Generator Form". It includes several options: a checked checkbox for "All Asset", an unchecked checkbox for "By Asset", and an unchecked checkbox for "By Date". There is an "Asset No" input field with a search icon and a "Clear" button. Below that, there are "From" and "To" date input fields, each with a calendar icon and a "Clear" button. A "Generate Report" button is located at the bottom right.

Figure 55: Asset History Report Generator Form

| Generate Asset History Options | |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>Generate asset history.</p> <p>These generate options are available:</p> <ol style="list-style-type: none">1. By asset (select an asset with the ellipsis button )2. All assets (default)3. By date range (default all dates) |

Here are the steps for using **Asset Maintenance History**:

1. On **Assets** opening screen, use **current site selector** to select the correct site. This will refresh assets listing automatically.



2. Click  to open the asset history report generator form as shown in **Figure 55**.
3. Select the options accordingly.
4. Click .
5. You should see the output in a pop-up window.
6. You could view or print it out.
7. Close the window.
8. Finish.

4.5.1 By Asset Option

When the ellipsis button is click, you select an asset from a pop-up window as shown below:

Search contains

Sort by order

3 records found
 [First | < Previous | Next > | Last] Page 1 of 1

ASSET-00002 AIR COOLING REGULATOR UNIT

ASSET-00003 Air Handling Unit #1

ASSET-00004 Building Hot & Cold Water Supply System

When you click the generate button, you will get a pop-up window as shown below. In this case, the asset has no history yet, hence, the empty history report window.

Asset Maintenance History Report By Asset

There are no records.

4.5.2 All Assets Option

If the option is set to **All Assets**, the generate button will produce a pop-up of the output as shown below. You can print it and then close the window.

Asset Maintenance History All

(This report displays only Closed WO(s))

| Asset No. : | ASSET-00003 | Asset Desc. : | Air Handling Unit #1 | Asset Location No. : | LOCN-0003 | Asset Location Desc. : | Workshop, Third Floor, Air Ventilation Unit | | | |
|---------------------------------|---------------------------------------|---------------|-----------------------|-----------------------|------------|------------------------|---------------------------------------------|---------------|---------|-------------|
| Work Order No. | Problem Description | Action Taken | Date Start | Date End | Work Type | Work Status | Labour Cost | Material Cost | DI Cost | Total Cost |
| PMsc000109000117 | Preventive - PM attach1 - PM with att | | 1 April 2009 00:00 | 8 April 2009 00:00 | Preventive | Closed | 0.00 | 0.00 | 0.00 | 0.00 |
| Total Maintenance Cost : | | | | | | | | | | 0.00 |
| Grand Total Cost : | | | | | | | | | | 0.00 |

4.6 How to Use Asset Tree



This feature allows you to view all your assets visually for **any site**. It displays the organization or distribution of your Assets at the site in the form of **asset tree**. Click the Asset menu item on the left any time you want to use this feature to view all your assets at a particular site visually.

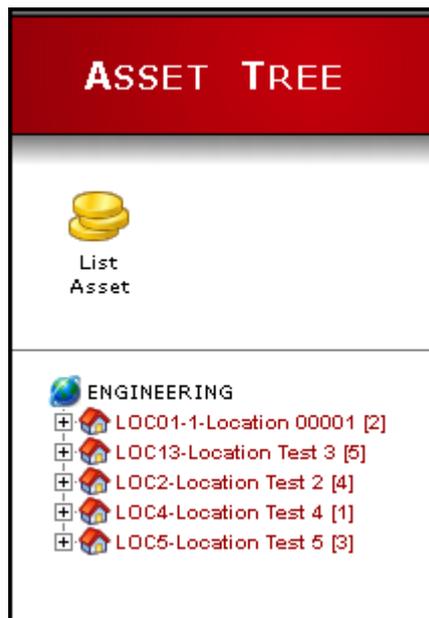


Figure 56: Unexpanded Asset Tree for current Site

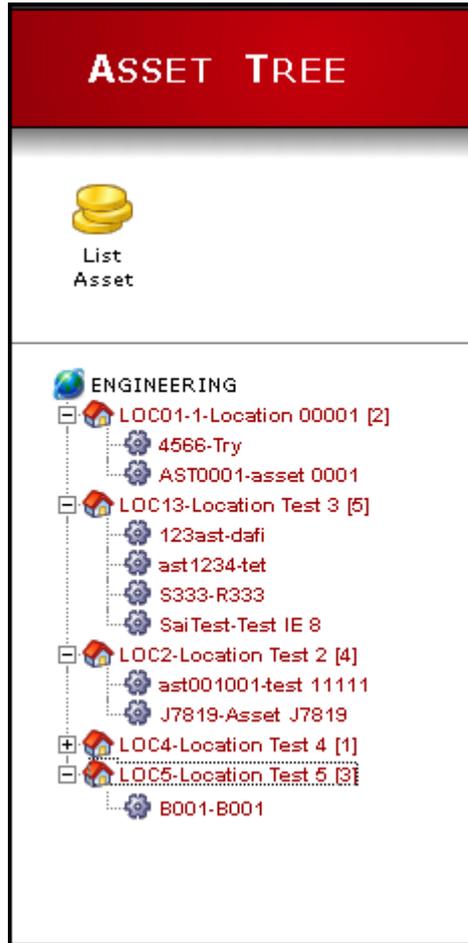


Figure 57: Expanded Asset Tree for the Current Site



Figure 56 and Figure 57 above show how the asset tree visually displays your assets at a site.

5. LOCATIONS

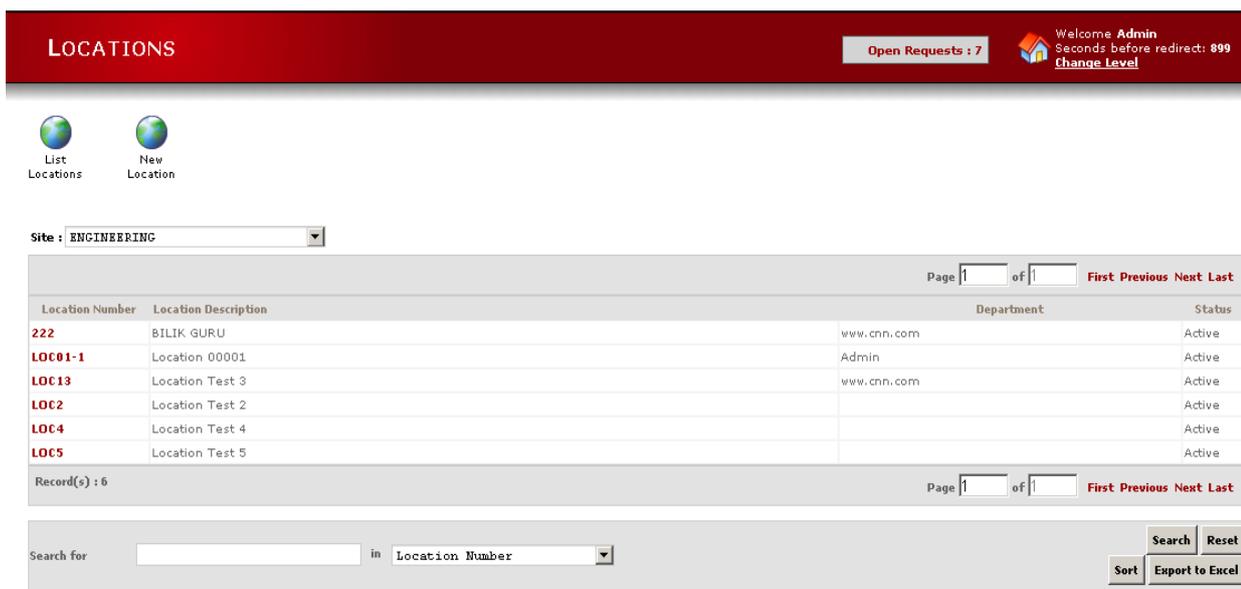


ACCESSING LOCATION

You can access **Location** on **CWorks EASY opening screen** by clicking the **icon** on the left, which will open the **Location Opening Screen**.

Location module allows users to register and manage **physical locations**. These locations are stored in the CMMS database since they are important to the maintenance operation. This is where users can create and add new locations to the CMMS database; edit and update existing locations, etc.

5.1 Location Opening Screen



LOCATIONS Open Requests : 7 Welcome Admin
Seconds before redirect: 899
[Change Level](#)

List Locations New Location

Site :

| Location Number | Location Description | Department | Status |
|-----------------|----------------------|-------------|--------|
| 222 | BILIK GURU | www.cnn.com | Active |
| LOC01-1 | Location 00001 | Admin | Active |
| LOC13 | Location Test 3 | www.cnn.com | Active |
| LOC2 | Location Test 2 | | Active |
| LOC4 | Location Test 4 | | Active |
| LOC5 | Location Test 5 | | Active |

Record(s) : 6

Search for in

Figure 58: Location Opening Screen

Figure 58 above shows the **Location opening screen**. Every time users visit this screen, it will automatically output the location listing as shown above. As always, make sure that the display

shows the **correct site**. Otherwise, use the **current site selector** shown below to change the site accordingly.



Apart from location listing, there are also two menu icons on this screen. These icons are described in the table below.

| No. | Menu Icon | Location Menu on the Opening Screen |
|-----|------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| 1. |  List Locations | Click this icon to go to the Location Opening Screen and automatically display the Location listing. |
| 2. |  New Location | Click this icon to open new Location registration form |

5.2 How to Add New Location



This feature allows you to add new locations to CMMS. To do so, you click on the above icon and you will see a new location form as shown in **Figure 59** below.

The screenshot shows the 'NEW LOCATION' form in the CMMS interface. The header is dark red with the text 'NEW LOCATION' on the left. On the right, it displays 'Open Requests : 7' and a user welcome message: 'Welcome Admin', 'Seconds before redirect: 905', and a 'Change Level' link. Below the header, there are two globe icons labeled 'List Locations' and 'New Location'. The site is set to 'ENGINEERING' and a 'General' tab is selected. The form contains several fields: 'Location No.' (text input), 'Description' (text input), 'Department' (dropdown menu), 'Note to Technician' (text area), 'Criticality' (dropdown menu with 'Critical' selected), and 'Cleaning Classification' (dropdown menu). There are 'Save' buttons at the top right and bottom right of the form area.

Figure 59: New Location form

To add a **New Location** the steps are:

1. On **Location opening screen** of **Figure 58** above, use **current site selector** to select the **site** of the new location. The CMMS will refresh the location listing when the site changes.



2. Click **New Location** and the CMMS will open the **New Location form** as in **Figure 59**.

3. Fill in location details into the form fields as shown below.

The screenshot displays a web-based form with a 'General' tab selected. The form contains the following fields and values:

| | |
|-------------------------|-------------------------------------------|
| Location No. | Locn-135 |
| Description | Engineering Block A5 |
| Department | Quality Department |
| Note to Technician | Safety Procedure SAFEXXT-500 is in force. |
| Criticality | Normal |
| Cleaning Classification | Public |

There are 'Save' buttons located at the top right and bottom right of the form area.

4. Click **Save** to save changes. After saving the CMMS will change the form to Location Editing form as shown below. At this point, users can continue to add further details or quit.

For full description on editing existing locations, see the next section.

CURRENT LOCATIONWelcome **Elias Ishak**
Seconds before redirect: **1180**
[Change Level](#)


List
Locations


New
Location

Site : Cworks Malaysia

General Inventory History Assets Attachment

Duplicate Location Deactivate Location Update

| | |
|--------------------------------|------------------------------------------------------------------------|
| Location No. | Locn-135 |
| Description | <input type="text" value="Engineering Block A5"/> |
| Department | <input type="text" value="Quality Department"/> |
| Note to Technician | <input type="text" value="Safety Procedure SAFEKXT-500 is in force."/> |
| Criticality | <input type="text" value="Normal"/> |
| Cleaning Classification | <input type="text" value="Public"/> |

Duplicate Location Deactivate Location Update

5. Finish.

5.3 How to View and Modify Existing Location

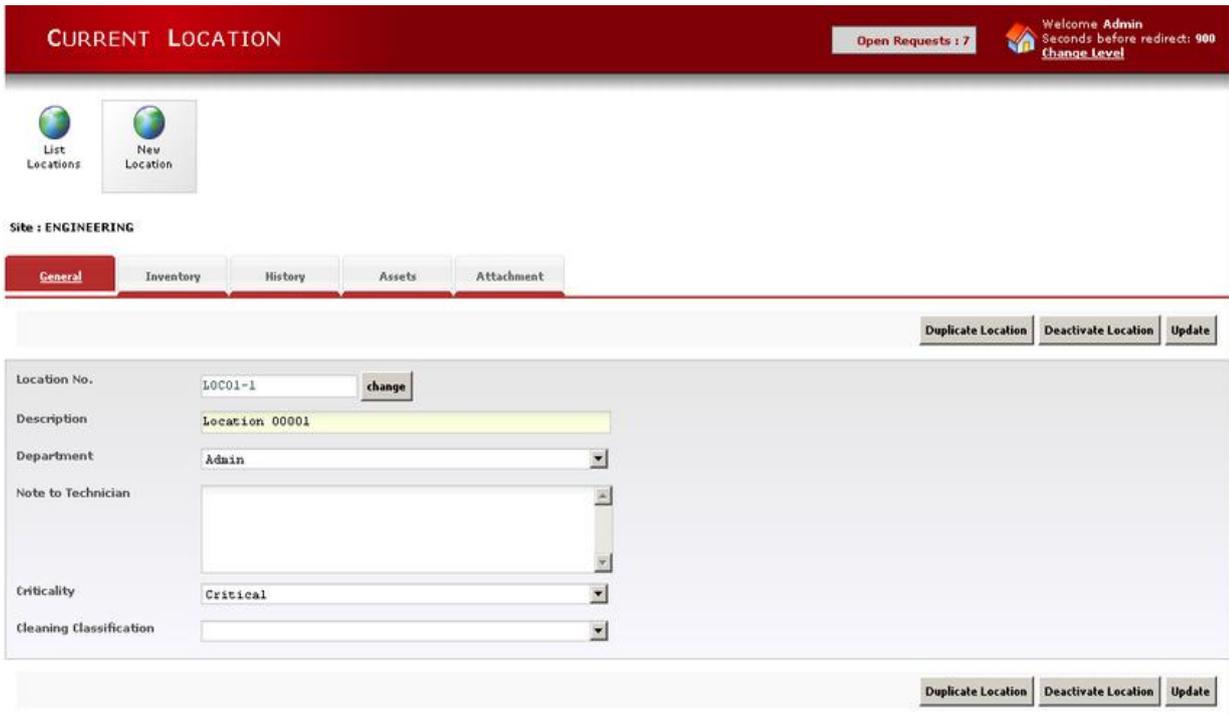
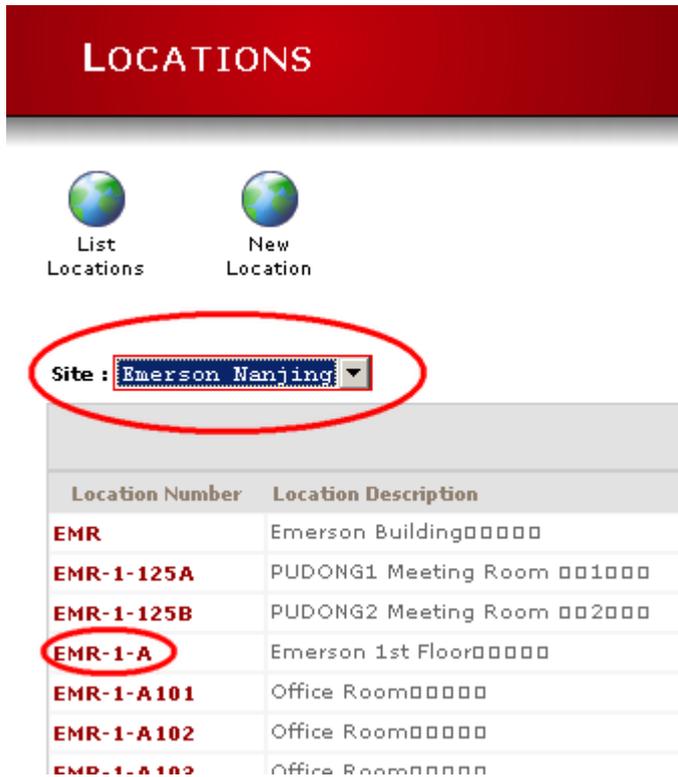


Figure 60: Current Location Screen – Edit Existing Location details

To edit details of an existing **location**, the steps are as follows:

1. On **Location Opening Screen** of **Figure 58**, first select the site using the **current site selector** shown below. This will refresh the location listing accordingly.



| Location Number | Location Description |
|-------------------|-----------------------------|
| EMR | Emerson Building□□□□□ |
| EMR-1-125A | PUDONG1 Meeting Room □□1□□□ |
| EMR-1-125B | PUDONG2 Meeting Room □□2□□□ |
| EMR-1-A | Emerson 1st Floor□□□□□ |
| EMR-1-A101 | Office Room□□□□□ |
| EMR-1-A102 | Office Room□□□□□ |
| EMR-1-A103 | Office Room□□□□□ |

2. Next, from the location listing, select the location to open for editing by clicking on its **location number**. The CMMS will load the location details into **edit Location form** as shown in **Figure 60** below. By default, the **General Tab** will be active.

CURRENT LOCATION


List
Locations


New
Location

Site : ENGINEERING

General

Inventory

History

Assets

Attachment

| | | |
|---------------------|----------------------------------------------|---------------------------------------|
| Location No. | <input type="text" value="LOC5"/> | <input type="button" value="change"/> |
| Description | <input type="text" value="Location Test 5"/> | |
| Department | <input type="text"/> | |

3. Edit the location details on one or more tabs as required. See editing description of each tab in the following sections.
4. When you finish editing, click the button to save the changes.
5. Finish.

5.3.1 How to use Inventory Tab

This tab records all items you add to this location. To **add items**, first you would pick a **category** from the **category list**. After selecting a category, items corresponding to the category automatically appear in the element list, from which you will be able to select items and add them to the current location.

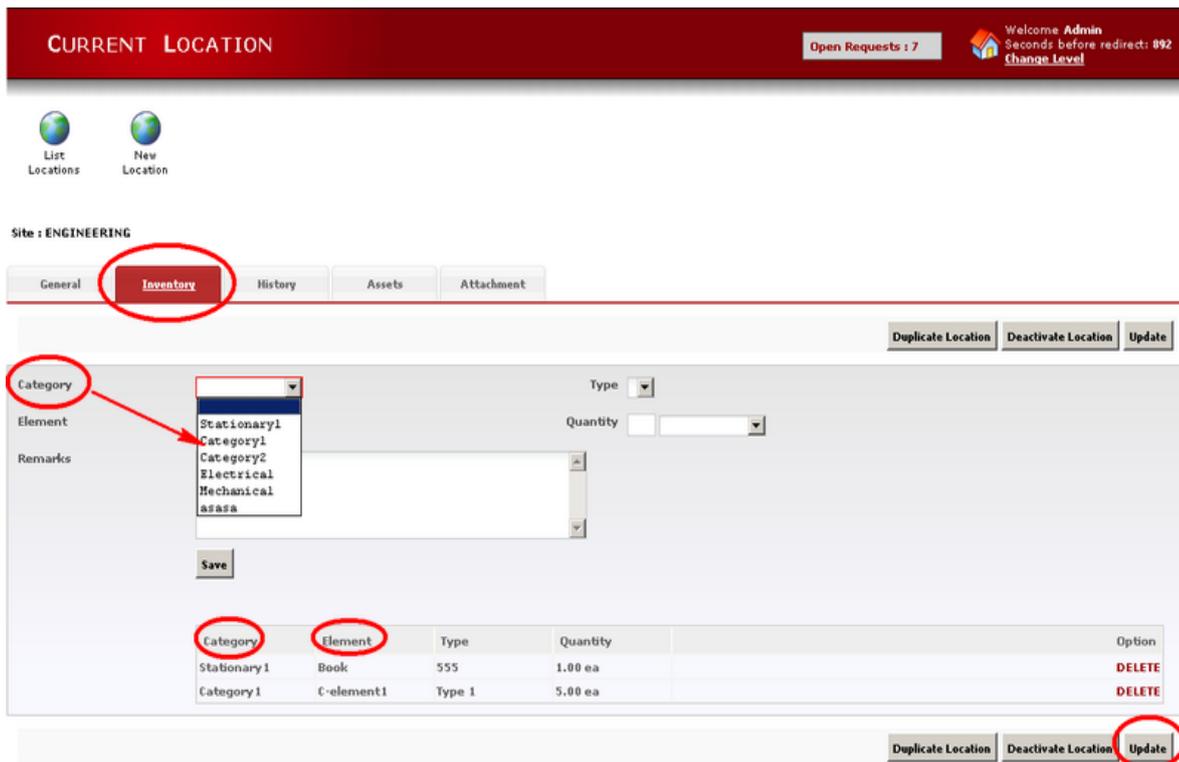


Figure 61: Inventory Tab Displaying the Form for Adding Items to Current Location

Here are the steps for adding items to Inventory of current location:

1. On **Location Opening Screen** in **Figure 58**, select the site of your location. This will refresh the location listing accordingly.
2. Next, to select a location for editing, click on its **location number** on the list. This will open and load the location details into **edit Location form** as in **Figure 60**. **General tab** will be the **active tab** by **default** as shown below.
3. Next, click **Inventory tab** to select it as the active tab.

- Next, select the **category**. This will populate the **element list** according to the **category** selected as shown below.

Site : ENGINEERING

General **Inventory** History Assets Attachment

Category: Stationary1

Element: Book

Remarks:
BOOKS
aaaa
asasas
sasa

Save

Type:
Quantity:
Quantity:
Quantity:

| Category | Element | Type | Quantity |
|-------------|------------|--------|----------|
| Stationary1 | Book | 555 | 1.00 ea |
| Category1 | C-element1 | Type 1 | 5.00 ea |

- Referring to the figure shown below. From the **element list** mentioned in step-4 above, select an element for the **Element** field.

In the **Type** field, from the drop-down list of types, select the element type. For instance, a book type can be 'Fiction', 'non-fiction', 'biography', 'technical', etc.

In the **Quantity** fields, specify the quantity. Finally, add any remarks if any.

Site : ENGINEERING

General **Inventory** History Assets Attachment

Category: Category2

Element: Cabinet

Remarks:
Sq Meters
Meters

Save

Type:
Quantity:
Quantity:
Quantity:

| Category | Element | Type | Quantity |
|-------------|------------|--------|----------|
| Stationary1 | Book | 555 | 1.00 ea |
| Category1 | C-element1 | Type 1 | 5.00 ea |

- Click Save to save the changes. This will add the items into the item listing as shown below.

Remarks

| Category | Element | Type | Quantity | Action |
|-------------|------------|--------|----------|---------------------------------------|
| Stationary1 | Book | 555 | 1.00 ea | <input type="button" value="DELETE"/> |
| Category1 | C-element1 | Type 1 | 5.00 ea | <input type="button" value="DELETE"/> |

Notice that there are **delete links** to the right hand side of the added items in the list. These **delete links** allow you to **delete the items** you add before, if necessary. Finally, if you do delete any of the items, you can always click to make sure your changes are recorded..

7. Finish.

5.3.2 How to use History Tab

The History tab allows you to view all the Work Orders ever issued to the current location. Every aspects of each work order is available for your viewing as shown in **Figure 62** below.

CURRENT LOCATION
Open Requests : 7
Welcome Admin
Seconds before redirect: 901
[Change Level](#)

 List Locations

 New Location

Site : ENGINEERING

General

Inventory

History

Assets

Attachment

Duplicate Location
Deactivate Location
Update

Export to Excel

| Work Order Number | Status | Received Date | Problem Description | Action Taken | Start Date | End Date | Labor Cost | D/I Cost | Part Cost | Total Cost |
|------------------------|-----------|------------------------|--------------------------------------------------------------------------------------------------------------|--------------|----------------------|----------------------|------------|----------|-----------|------------|
| 1 ENG1000003 | Assigned | 6 August 2010 09:16 | system test | | | | 0.00 | 0.00 | 98.35 | 98.35 |
| 2 ENG1000004 | Assigned | 10 August 2010 19:43 | c | | | | 0.00 | 0.00 | 16.00 | 16.00 |
| 3 PMENG1000016 | Cancelled | 11 August 2010 09:47 | TRY PM GROUP | | | | 0.00 | 0.00 | 0.00 | 0.00 |
| 4 ENG1000005 | Closed | 10 August 2010 19:43 | a | | 26 August 2010 19:47 | 26 August 2010 21:47 | 0.00 | 0.00 | 0.00 | 0.00 |
| 5 ENG1000006 | Open | 13 August 2010 11:53 | system checking for dashboard | | | | 0.00 | 0.00 | 0.00 | 0.00 |
| 6 ENG1000007 | Closed | 13 August 2010 12:07 | system jff | | 4 August 2010 12:07 | 20 August 2010 12:07 | 0.00 | 0.00 | 0.00 | 0.00 |
| 7 ENG1000014 | Cancelled | 26 August 2010 09:53 | test the service | | | | 0.00 | 0.00 | 0.00 | 0.00 |
| 8 ENG1000018 | Open | 17 August 2010 12:53 | Cold water tap is leaking in the male staff toilet. At present, the tap has been turned off at the stopcock. | | | | 0.00 | 0.00 | 0.00 | 0.00 |
| 9 PMENG10000153 | Open | 1 September 2010 12:34 | TRY PM GROUP | | | | 0.00 | 0.00 | 0.00 | 0.00 |

Figure 62: The History Tab listing all the Work Orders issued to this Location

5.3.3 How to use Assets Tab

The Asset Tab displays all the assets at the current location.

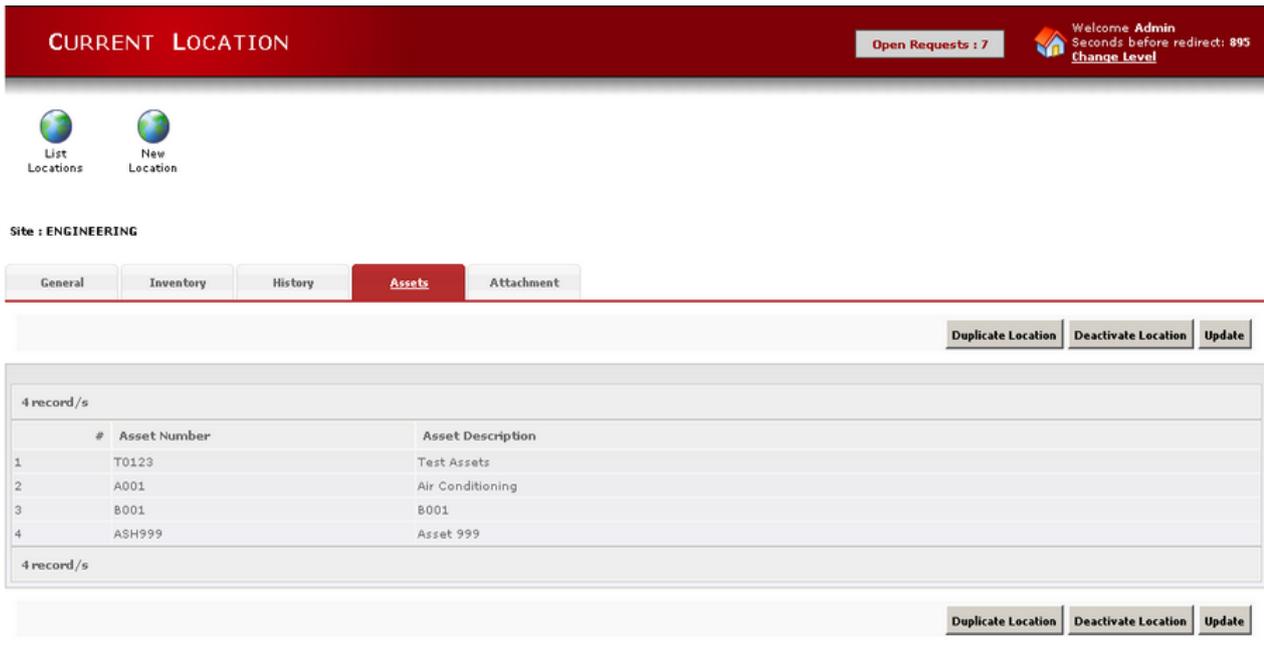


Figure 63: Asset

5.3.4 How to use Attachment Tab

The Attachment Tab allows you to attach files to current location.

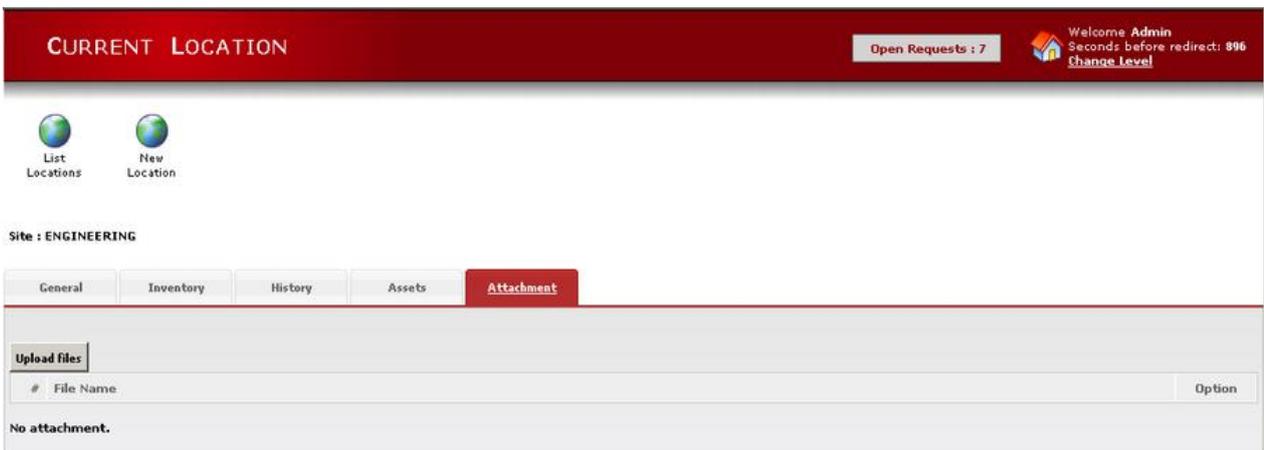


Figure 64: Attachment Tab for attaching files to Current Location

Here are the steps for attaching files to the current location:

1. On the **Current Location screen**, click the **Attachment Tab** to make it **active** and display the attachment panel as shown in **Figure 64** above.

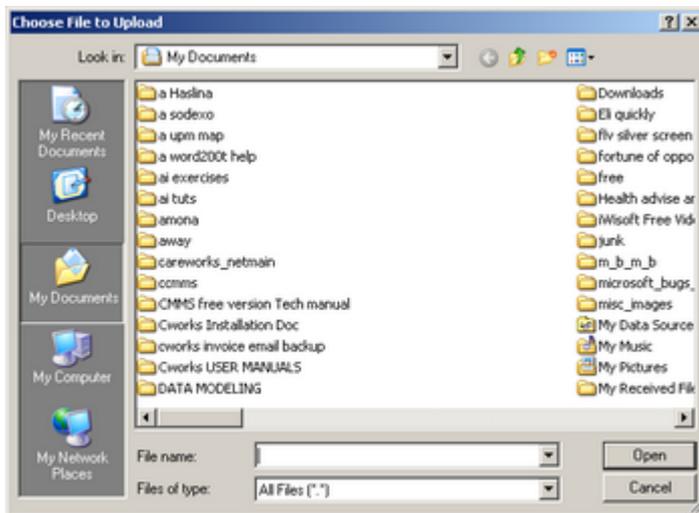
- To attach a file, click **Upload files**.

This marks the start of the file uploading process, and you will immediately see the **Upload File dialog** below.

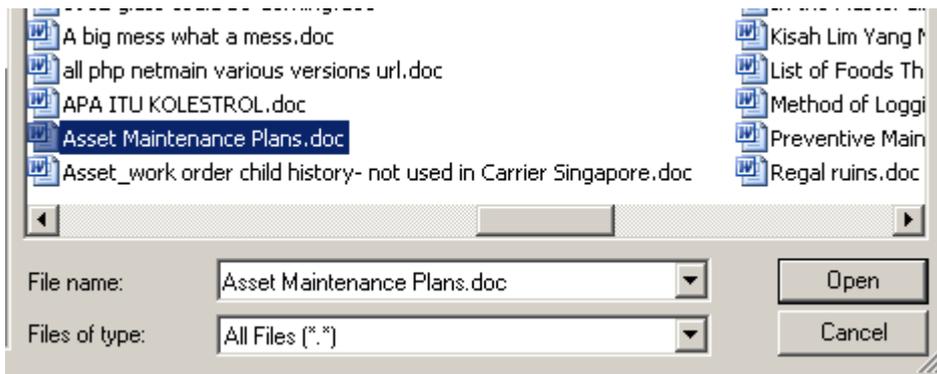


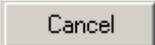
Through this dialog, you will browse the folders on your computer where you can only select a single file for uploading. Ultimately, this file will become your attachment file.

- Next, click **Browse...** to open folder browser as shown below.



- Browse and select the file as shown below.

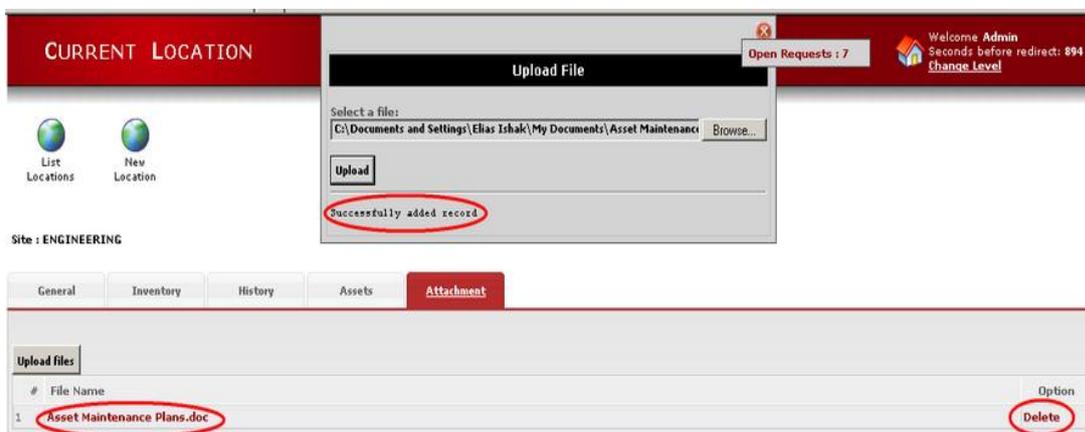


At this point, if you want to abort making file selection, click . Otherwise, continue with the next step.

- Continuing with the file selection, after highlighting a filename, click . This will copy the filename to the upload dialog field as shown below.



- Finally, click  to execute the upload sequence.
- If the file upload is successful, you receive the message as shown below. In addition, you will also see the filename listed as shown.



In case you no longer need to attach this file to the current location, there is a delete link to the extreme right of the filename for removing the file.

- Repeat the previous steps if you have more files to attach to the current location.
- Finally, click the close dialog  to get rid of the **Upload File dialog**.
- Finish.

5.4 How to Duplicate Existing Location Details to New Locations

This feature is part of **Current Location** and its usefulness will become obvious when you want to create several location records that are almost similar but not exactly. What it allows you to do is **duplicate existing location details** to new location form, from which you can make minor modification accordingly, and finish up with a new location that you want. It definitely speeds up creating almost similar locations and saves you precious time.

General Inventory History Assets Attachment

Duplicate Location Deactivate Location Update

Location No.

Description

Department

Note to Technician

Criticality

Cleaning Classification

Duplicate Location Deactivate Location Update

Duplicate Location

Here are the steps to duplicate the details in existing location to new location:

1. On **Location Opening Screen** in **Figure 58**, select the site containing the source location you want to duplicate using **current site selector**. This will refresh the location list automatically.
2. Select location whose details you want to duplicate by clicking its **location number** in the listing. This will open the location as **Current Location** for editing as shown below.

3. To duplicate this location details click **Duplicate Location**.
4. This will open new **location** form complete with the duplicated details if any as shown below.

5. Edit the new location to suit your requirements and give it a new location number. Below is only an example.

NEW LOCATION

List Locations New Location

Site : ENGINEERING

General

Location No. AbrahamW600

Description Abraham Wing 600

Department Yuyu

Note to Technician All regulations must be strictly observed. Any queries please direct them to your immediate supervisor who will escalate them through proper channel.

Criticality Critical

Cleaning Classification Room

6. Click  to save the new location.
7. You will be notified with the message below if the save is successful.



8. You can run a check by going to the location listing on the **Location opening screen.**
9. Finish.

5.5 How to Use Deactivate Location to Delete Location

This feature is part of the current location and it is useful when you want to delete the location.

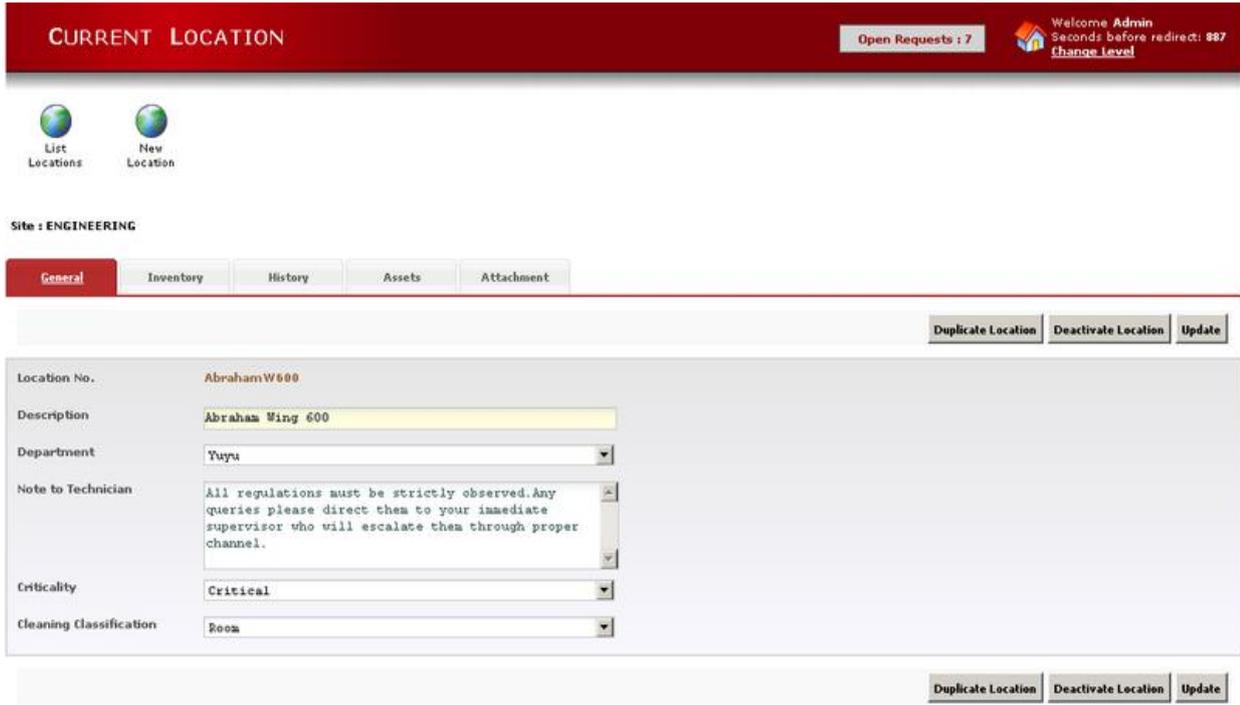
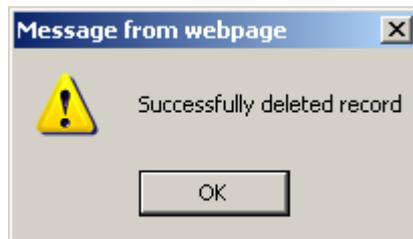


Figure 65: Deleting the Current Location

Referring to the **Figure 65** above, when you click **Deactivate Location** on the **Current Location**, the CMMS will delete that location record, and you will see the message below when deletion is successfully.



6. PREVENTIVE MAINTENANCE



ACCESSING PREVENTIVE MAINTENANCE

You can access **Preventive Maintenance** by clicking the **icon** on the left, which will open the **Preventive Maintenance Opening Screen**.

Scheduling of Preventive Maintenance activities are set up using the following two methods:

1. Time Based Scheduling Method
2. Meters or Condition Monitoring Scheduling Method

For health and safety reasons, only qualified personnel should carry out *Maintenance tasks*.

6.1 Preventive Maintenance (PM) Opening Screen

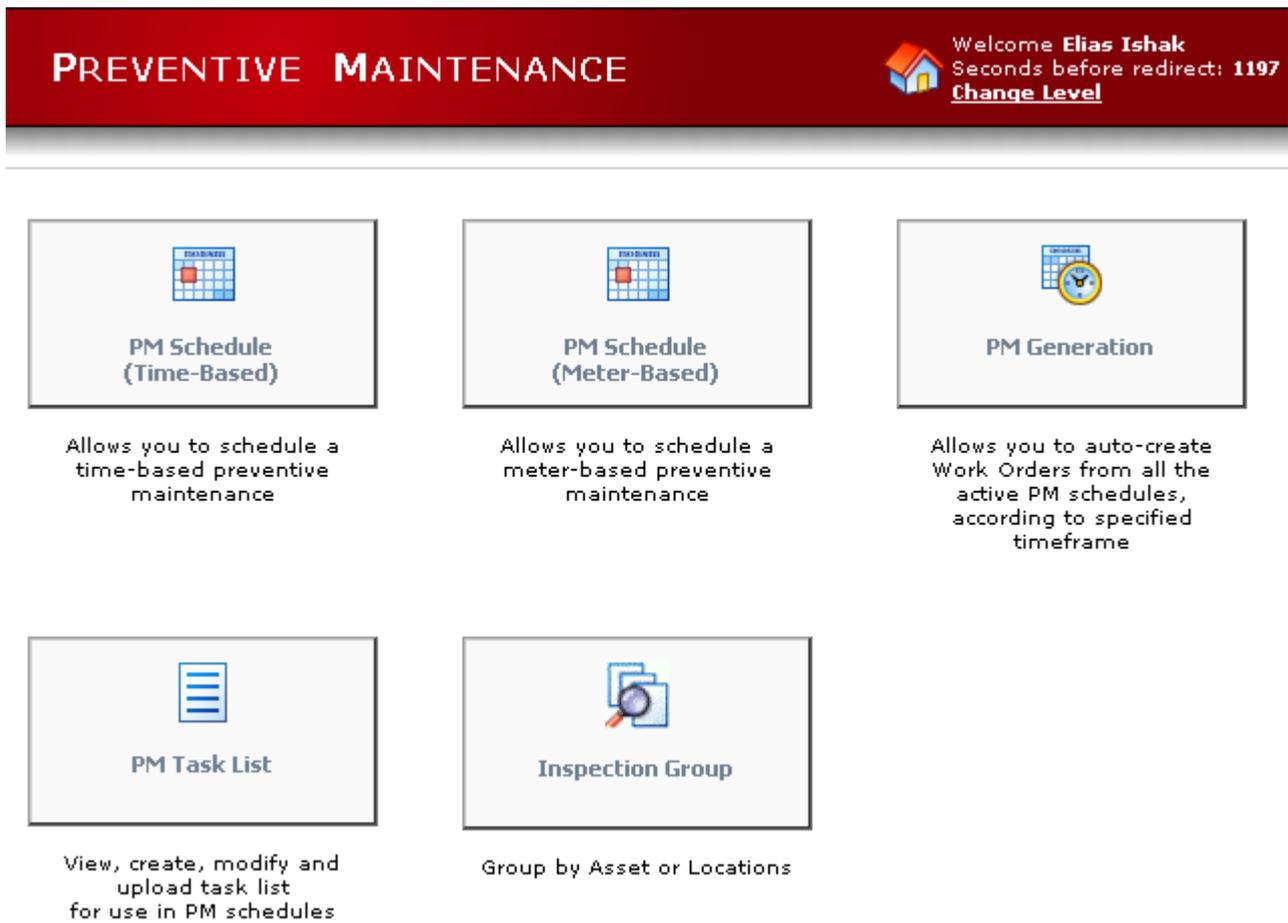


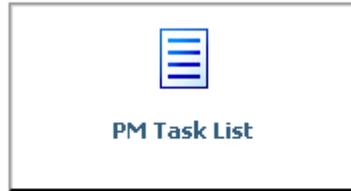
Figure 66: Preventive Maintenance (PM) Opening Screen

The following sections will deal with each of the above menu icons in turn.

6.2 PM Task List – How to use it

This section describes how to access **PM Task List screen**, where you can:

1. Create new tasks
2. Modify old tasks
3. Upload task list for use in PM schedules



View, create, modify and upload task list for use in PM schedules

You can access **PM Task List screen** shown in **Figure 67** below by clicking the menu icon above.

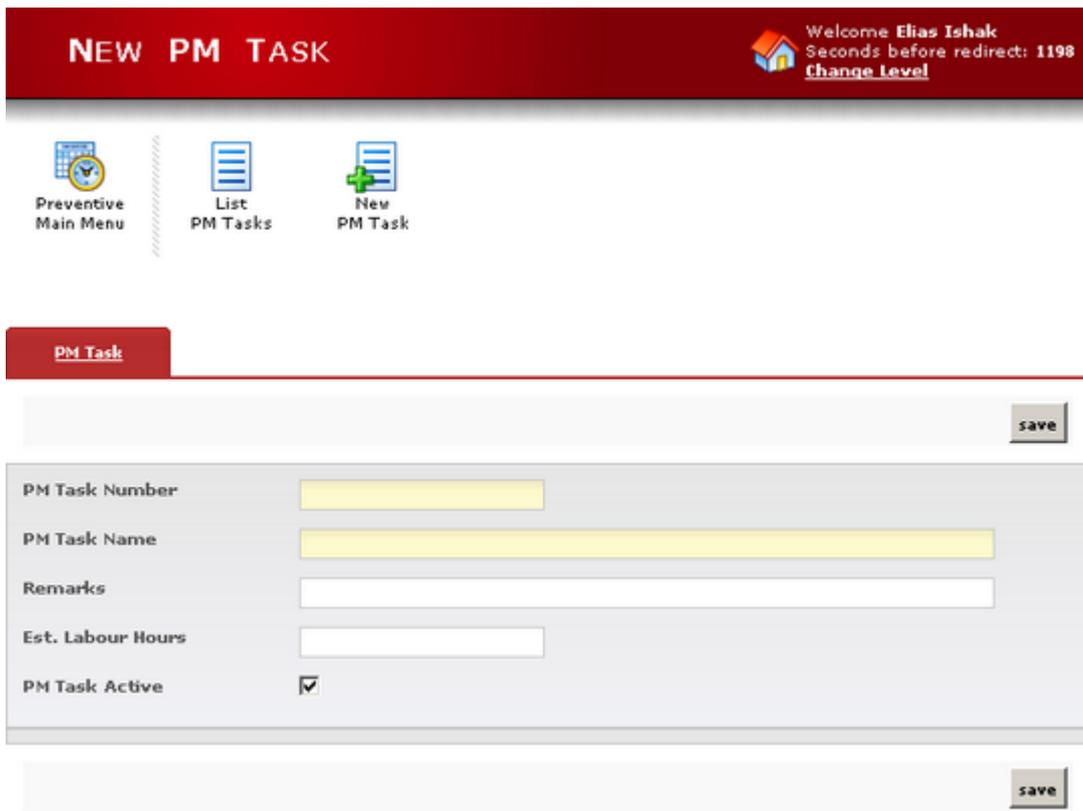
The screenshot shows the PM Task List interface. At the top right, a red banner contains a home icon, the text "Welcome Elias Ishak", "Seconds before redirect: 1193", and a "Change Level" link. Below the banner are three menu icons: "Preventive Main Menu" (calendar and clock), "List PM Tasks" (document icon), and "New PM Task" (document icon with a green plus sign). A "Site" dropdown menu is set to "Cworks Malaysia". The main content area features a table with columns for "PM Task Number", "PM Task Name", "Est. Labour Hrs.", and "Status". The table lists three tasks: "F01" (test pm, 0 hrs, Active), "Task2" (syetne, 0 hrs, Active), and "task3" (ets, 0 hrs, Active). Below the table is a "Record(s) : 3" label and a second set of pagination controls. At the bottom, there is a search bar with a dropdown set to "PM Task Number" and buttons for "Search", "Sort", and "Reset". A "Display" dropdown is set to "Active Records".

| PM Task Number | PM Task Name | Est. Labour Hrs. | Status |
|----------------|--------------|------------------|--------|
| F01 | test pm | 0 | Active |
| Task2 | syetne | 0 | Active |
| task3 | ets | 0 | Active |

Figure 67: PM Task List Screen – it lists all PM tasks

| PM TASK LIST MENU | | |
|-------------------|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| No. | Menu Icon | Description |
| 1. |  Preventive Main Menu | Exit to PM main menu |
| 2. |  List PM Tasks | You can use this (click it) to abort any editing that you do not want to save to a PM task. And it is used for accessing the PM task listing. |
| 3. |  New PM Task | Create a new PM task |

6.2.1 How to Open New Blank PM Task Form



NEW PM TASK Welcome **Elias Ishak**
Seconds before redirect: 1198
[Change Level](#)

 Preventive Main Menu
  List PM Tasks
  New PM Task

PM Task save

PM Task Number
 PM Task Name
 Remarks
 Est. Labour Hours
 PM Task Active

save

Figure 68: New PM Task Blank Form

To create a **new PM task**, follow the steps below:

1. Go to PM task listing on **PM Task List screen** shown in **Figure 67** above. Click **New PM Task icon** (right) in order to open a **blank new form** shown in **Figure 68** above.
2. Enter a unique new **PM Task Number** (mandatory).
3. Enter a new **PM Task Name** (mandatory).
4. Enter any note or comment in the **Remark** field (non-mandatory).
5. Enter the estimated number of hours the task will take into the **Est. Labour Hours** (non-mandatory).
6. If this **PM Task is not yet active**, click the checkbox '**PM Task Active**' to remove the checkmark. Otherwise, leave the checkmark on.
7. Click **Save** to save your new record.



When the CMMS successfully saved your record, it will open the task in the editing form so that you can continue to edit further. You can see this form in **section 6.2.2– How to Open Existing PM Tasks for Viewing or Editing**.

8. Finish.

Note The **PM Task Number** is **unique** and cannot be changed after you create it. Now that you have created a basic PM Task, you can reopen it and fill in other information accordingly.

Note To **exit without saving** the new PM task, click the “**List PM Tasks**” icon



on the screen.

6.2.2 How to Open Existing PM Tasks for Viewing or Editing

This section describes how to open and edit an existing PM Task.



PM Task
Materials
Safety Instruction
Additional Attachment
Tools
Craft
PPE

Copy
update

PM Task Number: change

PM Task Name:

Remarks:

Attach Document: Upload files

Est. Labour Hours:

PM Task Active:

Checklist

| Sequence | Subtask Description (English) | Subtask Description (Other) | Option |
|--------------------------|----------------------------------------------------------------|-----------------------------|-------------|
| <input type="checkbox"/> | English: <input style="width: 95%;" type="text"/> | | Save |
| | Other Translation: <input style="width: 95%;" type="text"/> | | |

Copy
update

Figure 69: Opening Existing PM Task for Modifying

Here are the steps to open existing PM task for modifying/editing:

1. Go to **PM task listing** on **PM Task List screen** shown in **Figure 67** above.
Click on the **PM Task number** in the listing in order to select and open it for editing

as shown in **Figure 69** above. **PM Task tab** PM Task will be the active tab by default.

2. Edit each field as appropriate.
3. Add any **new Sequence Numbers** and their respective **Subtask Descriptions** as required, by going directly to these fields and entering them. Click **Save** to save your entries into the list of tasks.

| Sequence | Subtask Description (English) | Subtask Description (Other) | Option |
|----------|-----------------------------------------------------------------------|-----------------------------|--------|
| 1 | English: Add new piece of anti static mat at the base of the unit. | | Save |
| | Other Translation: | | |

After you click **Save**, your entry will be saved as shown below into the list.

| Checklist | | | |
|-----------|-----------------------------------------------------------|-----------------------------|-----------------|
| Sequence | Subtask Description (English) | Subtask Description (Other) | Option |
| 1 | Add new piece of anti static mat at the base of the unit. | | Modify Remove |
| | English: [Empty text box] | | Save |
| | Other Translation: [Empty text box] | | |

Notice that you can edit your saved entry if you need to.

4. Repeat the above steps until you have added all your **Sequence Number** and **Subtask Description pairs**. This constitutes a complete **checklist** for this PM task.

Note It is recommended that you keep the **Sequence Number** sequential. That way you can spot any mistakes more easily.

5. Finally, click **update** to save your changes.
6. Finish.

6.2.3 How to Fill in the Materials Tab

| PM Task | Materials | Safety Instruction | Additional Attachment | Tools | Craft | PPE |
|----------------------|----------------------|--------------------|-----------------------|----------------------|-------|-------------|
| | | | | | | Copy update |
| <input type="text"/> | <input type="text"/> | ... | Clear | <input type="text"/> | Save | |
| Part No | Part Desc | Qty | Option | | | |
| | | | | | | Copy update |

To fill in the material form above, you simply click the ellipsis button  to pop up a listing of parts as shown below, select the material by clicking on the **part number** you are selecting and the CMMS will load the fields above with the part data. Repeat as adding parts as required. Finally, remember to click  to save.

Page of [First](#) [Previous](#) [Next](#) [Last](#)

| Parts No | Parts Name |
|----------------|-------------------------|
| AG01 | SEAL FI |
| BG-0001 | Hammer |
| BR-999 | Screw jumpo |
| d | d |
| JP001 | Crock-1 |
| JYT09 | SPANER |
| M199558 | Mechanical Shock Damper |
| P001 | Hardened Steel Bearings |
| P002 | Part 002 |
| P003 | Oil Seal |

Number Description

6.2.4 How to Fill in Safety Instruction Tab

PM Task Materials **Safety Instruction** Additional Attachment Tools Craft PPE

Copy update

Safety Instruction No. SI001 ... Clear

Safety Instruction **Safety Ins 001**

1. Try safety

Copy update

To fill in the safety instruction form above, you simply click the ellipsis button  to pop up a listing of **safety instructions** as shown below, select the instructions by clicking on the **safety number** you are selecting and the CMMS will load the fields above with the appropriate data.

Repeat as adding parts as required. Finally, remember to click  to save.

Page 1 of 1 First Previous Next Last

| Safety No | Safety Name |
|-----------|----------------|
| SI001 | Safety Ins 001 |

Number Description

Find

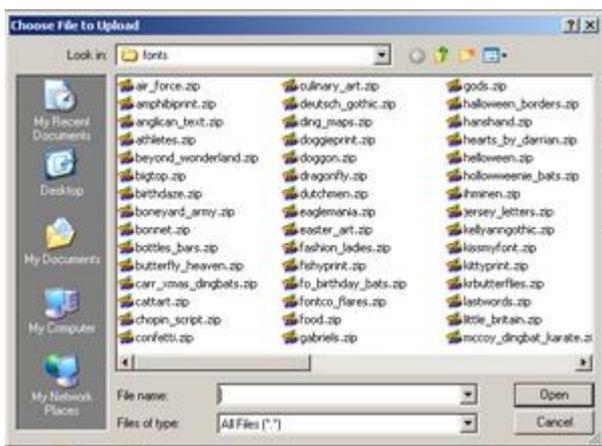
6.2.5 How to Use Additional Attachment Tab



To upload files, you simply click **Upload files** to pop up up-load file dialog window shown below.



In the window, you will find a browser button that allows you to browse through folders and select a file to upload as shown below.



After selecting a file, you should click the **Upload** to transmit the file.

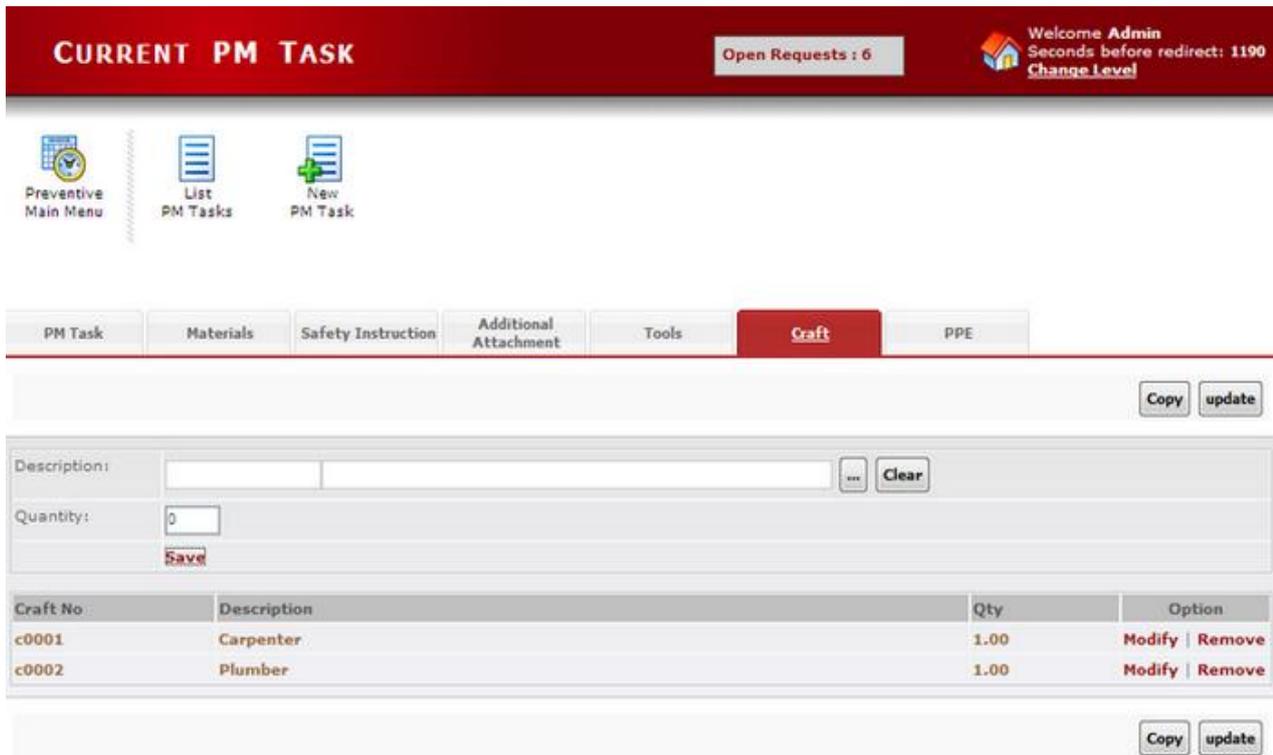
6.2.6 How to Use Tool Tab

| PM Task | Materials | Safety Instruction | Additional Attachment | Tools | Craft | PPE |
|--------------|----------------------|--------------------|-----------------------|--------------|-------|--------|
| | | | | | Copy | update |
| Description: | <input type="text"/> | | | | | |
| Quantity: | <input type="text"/> | | | | | |
| Save | | | | | | |
| # | Tool Description | Qty | Option | | | |
| | | | | | Copy | update |

Here are the steps to add Tools:

1. Type in tool description in the **Description** field, and set quantity in the **Quantity** field.
2. Click **Save** button and the tool will added to the list at the bottom of the Tools form above.
3. To add more tools, repeat the above steps as many times as required.

6.2.7 How to Use Craft Tab



Here are the steps to add crafts:

1. Fill in the **Description** field by selecting a craft as follows:
Click the **ellipsis** tool to display a pop-up **listing of crafts**, from which one can be selected with a click.
2. After selecting the craft, set the quantity in the **Quantity** field.
3. Click **Save** button.
4. To add more crafts to the list, repeat the above steps as many times as required.
5. Finish.

Notes



Each entry in the list of Crafts can be edited or removed using **Modify** and **Remove** buttons as shown respectively.

6.2.8 How to Use PPE Tab

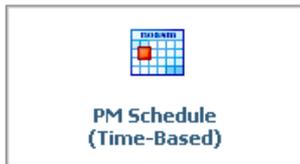
| | | | | | | |
|-------------------------------------|-------------|--------------------|-----------------------|-------|-------|---------------------------------------------------------------------------|
| PM Task | Materials | Safety Instruction | Additional Attachment | Tools | Craft | PPE |
| | | | | | | <input type="button" value="Copy"/> <input type="button" value="update"/> |
| Description: <input type="text"/> | | | | | | |
| <input type="button" value="Save"/> | | | | | | |
| # | Description | | | | | Option |
| | | | | | | <input type="button" value="Copy"/> <input type="button" value="update"/> |

To add PPE, type in PPE's description, and click **Save** button. Repeat as required.

6.3 PM Schedule (Time-Based)

This section describes how to create *maintenance schedules* based on *fixed time intervals* for assets and physical locations.

6.3.1 Opening Screen



Allows you to schedule a time-based preventive maintenance

You can access **PM Schedule (Time-based) screen** shown in **Figure 70** below by clicking the icon above which you can find on the **Preventive Maintenance (PM) opening screen**.

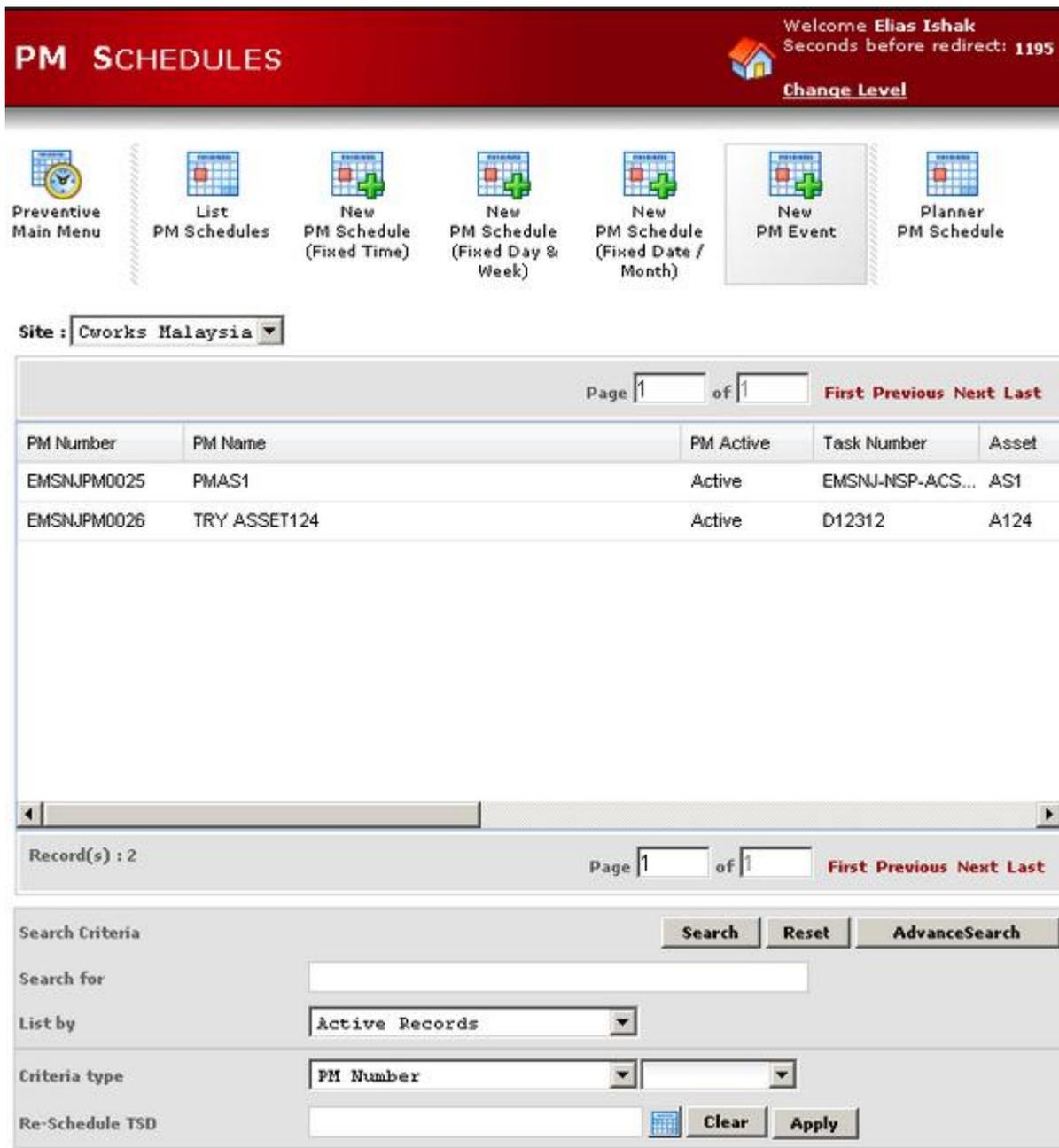


Figure 70: PM Schedule (Time-based) Opening Screen

On the screen of **Figure 70**, you will find a line of **seven menu icons**. The table below gives a brief description of each of these icons. Next, underneath these menu icons, you will find a drop-down list **site selector**. This selector allows you to set your **current working site**. Next, underneath this **site selector**, you will find the current full **PM time-based schedules listing**. Finally, below this listing you will find the PM schedule **search facility** for locating a particular schedule, or a group of schedules.

| PM SCHEDULE (TIME-BASED) SCREEN | | |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| No. | Menu Icon | Description |
| 1. |  Preventive Main Menu | Exit PM Schedule (Time-based) and return to PM Opening Screen . |
| 2. |  List PM Schedules | A click on this icon will take you to PM Schedule (Time-based) Opening Screen where you will find all PM Schedule Listing |
| 3. |  New PM Schedule (Fixed Time) | Create New PM Schedule (Fixed Time) |
| 4. |  New PM Schedule (Fixed Day & Week) | Create New PM Schedule (Fixed Day & Week) |
| 5. |  New PM Schedule (Fixed Date / Month) | Create New PM Schedule (Fixed Day & Month) |
| 6. |  New PM Event | Create New PM Event |
| 7. |  Planner PM Schedule | Open Planner PM Schedule |

Notice that each **schedule** in the main listing has a *unique PM Number* (not editable) and a *PM Name* (editable) for identification purposes.

6.3.2 How to Create – New PM Schedule (Fixed Time-Based)

PM Schedule save

PM Number auto-generate

PM Name

Work Type

Work Trade

PM By

Asset

Asset No. - Desc. ... Clear

Asset Location

Asset Status

Location

Location No. - Desc. ... Clear

Inspection Group

Group No. - Desc. ... Clear

Task Number ... Clear

PM Generation Type

Frequency Unit

Frequency Target Start Date ... Clear

Days Target Complete Date

Work Period Day(s) Next Start Date

save

Figure 71: New PM Schedule (Fixed Time-Based)

This is where you create the New **Fixed interval time-based PM Schedules** for assets or physical locations.

Here are the steps to create new **PM Schedule**(fixed Time-based):

1. On **PM Schedule (fixed time-based) opening screen** of **Figure 70**, using the drop-down list **site selector** set your current working site.

- Click on the icon below to display a blank **new PM Schedule form** as shown in **Figure 71** above.



- Enter **PM Number** if you do not have it on auto-generate. Otherwise, you can leave it to the CMMS to generate a number for you. (Compulsory field)
- Enter **PM Name**. (Compulsory field)
- Enter **Work Type**. (Compulsory field)
- Enter **Work Trade**. (Compulsory field)
- Next, you select your '**PM By**' section accordingly.
You can set it to **Asset**, **Location** or **Inspection Group** and enter an appropriate description via the **ellipsis button**  (pop-up a listing of descriptions) for it in the allocated field.
- Enter **Task Number** via the ellipsis button  (pop-up a listing of task numbers).
- Select '**PM Generation Type**' via the drop-down list. You can select either '**Schedule**' or '**Actual**'.
- Select '**Frequency Unit**' via the drop-down list.
- Set **Frequency**, **Days**, **Work Period Day(s)**, **Target start Date**, **Target Complete Date** and **Next Start Date**.
- Click **Save**.
Note: After CMMS saved your PM schedule, the form will change to modify/edit PM schedule form so that you can continue to fill in the rest of the schedule. See next section.
- Finish.

The table below gives the description of the fields in **Figure 71**.

| NEW PM SCHEDULE FORM | |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fields | Description |
| PM Number | Identifier of the PM Schedule master record. By default this number is automatically generated and the checkbox is ticked as shown below.  auto-generate Un-tick the checkbox if you prefer to enter each PM |

| NEW PM SCHEDULE FORM | |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fields | Description |
| | Number manually |
| PM Name | Description of the PM Schedule master record or a name. You must enter a name in this field. Compulsory field |
| Work Type | Classification of type of work order. Defaults to Preventive. <i>Read only field.</i> |
| Work Trade | The trade or section that is primarily responsible for the work (obtained from the Work Trade Master) You must select one from the drop down menu. Compulsory field |
| PM by | Select one from: Asset or Location or inspection Group. Select whether PM Schedule is by one of the above. |
| Asset No., Description | Defines asset on which the preventive maintenance is to be done. Select the Asset from the drop down list. The asset must have been registered in the Asset Master for preventive maintenance scheduling. The Asset Location & Asset Status are retrieved from the Asset masters . |
| Location No., Description | Defines the physical location where the preventive maintenance is to be done. The physical location must have been registered in the Location master for preventive maintenance scheduling. Select the Location from the drop down list. |
| Group No., Description | Defines the Inspection group to associate with this PM Schedule. |
| Task Number | Defines the preventive maintenance task to assign to this schedule. You can select from the drop down list, which displays all registered tasks in PM Task master. |
| Supplier Number | Set supplier associated with this schedule |
| Employee | Select one or more employees associated with this schedule. The employees will be listed here if more than one employee is selected for this schedule. |
| PM Generation Type | Select either Schedule or Actual. |

| NEW PM SCHEDULE FORM | |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fields | Description |
| Frequency Unit | Defines frequency unit of this PM. Available units are Day (1 day), Week (7 days) and Month (28 days). |
| Frequency | Defines the factor for which the Frequency Unit is multiplied to provide the number of days that should elapse between generations of PM work orders. |
| Days | <p>The number of days that should elapse between generations of PM work orders. This is a read only field and is automatically calculated.</p> <p>Formula:</p> <p>Days = Frequency Unit (in Days) x Frequency</p> |
| Work Period Day(s) | Defines the number of days, which shall be taken to complete the PM Task. Defaults to 1 day. |
| Target Start Date | <p>This is a read only field, which is automatically calculated. It displays the date that the next PM work order is scheduled to be generated. The calculation is as follows;</p> <p>For first generation</p> <p>Target Start Date = Initiate Date + Days</p> <p>For subsequent generation (in the Current PM Schedule Form)</p> <p>Target Start Date = Last Generated PM Work Order Target Start Date + Days</p> |
| Target Complete Date | <p>This is a read only field, which is automatically calculated. It displays the target completion date of the PM work order.</p> <p>Target Complete Date = Target Start Date + (Work Period Days - 1 day)</p> |
| Next Start Date | <p>This is a read only field, which is automatically calculated. It displays the next target start date for the PM schedule.</p> <p>For first generation</p> <p>Next Start Date = Target Start Date + Days</p> <p>For subsequent generation (in the Current PM Schedule Form)</p> <p>for Next Generation by Scheduled Date;</p> |

| NEW PM SCHEDULE FORM | |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fields | Description |
| | <p>Next Start Date = Target Start Date + Days for Next Generation by Actual Date;</p> <p>Next Start Date = Last PM WO Complete Date + Days</p> <p>(Note: No Next Start Date will be displayed until the concerned PM work order is closed)</p> |
| <input type="button" value="Save"/> | Click to save data on the form. |

6.3.3 How to Modify – Old PM Schedule (Fixed Time-Based)

PM Schedule
Multiple Task

Update
Forecast

PM Number **P78**

PM Name

Work Type

Work Trade

PM By

Asset

Asset No. - Desc. ... Clear

Asset Location **L001-Location 1**

Asset Status **Active**

Location

Location No. - Desc. ... Clear

Inspection Group

Group No. - Desc. ... Clear

Task Number ... Clear

Supplier Number ... Clear

Employee ... Clear

Add into list ▼

| # | Employee Number | Employee Name | Option |
|---|-----------------|---------------|--------|
| | | | |

PM Generation Type

Frequency Unit

Frequency Target Start Date Clear

Days Target Complete Date

Work Period Day(s) Next Start Date

PM Active

Update
Forecast

Figure 72: Edit Existing PM Schedule (Fixed Time-Based)

This section describes how to open an existing **Fixed time-based PM Schedules** for modification/editing.

Here are the steps to modify **existing PM Schedule (Fixed Time-Based)**:

1. On **PM Schedule** (fixed time-based) **opening screen** of **Figure 70**, using the drop-down list **site selector** set your current working **site**. This will refresh the pm schedule listing.
2. Select **pm schedule** to open for modification by clicking on the **pm schedule number** on the **pm schedule listing**. This will open the schedule in the editing form shown in **Figure 72** above. By default, **PM Schedule Tab** will be the active tab.
3. Edit the fields on this tab accordingly and when you finished this tab, click **Update button** to save your changes, before moving to the second tab.
4. Click **Multiple Task Tab** to make it active. See the next section on how to edit this tab's fields.
5. Finish.

6.3.3.1 How to Edit Multiple Task Tab (Fixed Time-Based)

Note

1. **Multiple Task Tab** never appear on a **new PM Schedule form**.
2. **Multiple Task Tab** only appear on PM Schedule form after you saved and create the new PM Schedule.

Multiple PM Tasks feature gives you the ability to schedule more than one **PM Task** per asset, or per physical location. It allows you to create PM Tasks of a higher frequency to take precedence when PM work order generation is due. By assigning multiple PMs to each PM Schedule, you tell the system which pm task has priority over other pm tasks, and that it should generate the work order for it.

Site : Cworks Malaysia

PM Schedule **Multiple Task**

Update Forecast

PM Number P78

PM Name Service Workshop

Task Number PMT29-Active ... Clear

Task Sequence Start at Date / Seq. Number 2011-02-15 1

Remarks

Save Into List ▼

Multiple Task List

| # | Task Number | Task Seq. | Start Date / Sequence | Remarks |
|--------------|-------------|-----------|-----------------------|---------|
| Delete All ▲ | | | | |

Update Forecast

Figure 73: Multiple Task Form (Fixed Time-Based)

Here are the steps to create **multiple tasks (Fixed Time-Based)**:

1. On **PM Schedule** (fixed time-based) **opening screen** of **Figure 70**, using the drop-down list **site selector** set your current working **site**. This will refresh the pm schedule listing.
2. Select **pm schedule** to open for modification by clicking on the **pm schedule number** on the **pm schedule listing**. This will open the schedule in the editing form shown in **Figure 72** above. By default, **PM Schedule Tab** will be the active tab.
3. Click **Multiple Task Tab**.
4. Enter **Task Number** via the ellipsis () button.
5. Enter **Task Sequence** e.g. 100.
6. Select **Start at Date** via drop-down selection.
7. Select **Seq. Number** via drop-down selection.
8. Enter Description detail in **Remarks** field.
9. Click  . This record will be added to the **Multiple Task List** and saved as one of the multiple tasks for this **PM Number**.
10. Repeat step (4) to (9) to add more tasks.
11. Click  to update the whole record.
12. Finish.

To delete all the pm tasks under **Multiple Task List** simultaneously, click . The CMMS will ask you to confirm your action before deletion will take place.

| Multiple Task Tab Description of Fields on this form | |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| FIELDS | DESCRIPTION |
| PM Number | Identifier of the PM Schedule master record. |
| PM Name | Description of the PM Schedule master record or a name. |
| PM No. & Name | Identifier of the PM Schedule record carried over from the PM Schedule tab. |
| Task Number | Defines the multiple PM tasks. The Task No is selected from the drop down list. |
| Task Sequence | Defines the PM count at which the defined task will be used. Example, 2 means that the Task will be generated 2 times the PM is generated, 12 means every 12 times etc. |
| Start at Date / Seq. Number | Defines the start date / PM count no of the PM Task. The date field is read only. The start PM count can be amended by either changing the Seq. No or by clicking on the View/Change button to activate the PM Plan Forecast screen and double clicking on the required PM count. |
| Remarks | A remarks field. |

6.3.3.2 How to Disable an Existing PM Schedule

The screenshot shows a form with three fields: 'Days' with a value of 7, 'Work Period Day(s)' with a value of 1, and 'PM Active' with a checked checkbox.

Figure 74: PM Active Checkbox – Users can enable or disable a PM Schedule

In order to use this feature, first, you must open a PM schedule to disable in **modification/editing** screen (see **How to Modify – Old PM Schedule (Fixed Time-Based)**) as shown in **Figure 72**. At the bottom of this screen, you will find **PM Active checkbox** as in **Figure 74** above.

To **disable** this PM schedule, click **PM Active checkbox** to remove the **tick mark**. This will stop all the **work order generation** for this PM schedule.

6.3.3.3 How to Amend PM Schedule & Task

| Scheduling | | |
|--------------------|------------|----------------------|
| PM Generation Type | Schedule | |
| Task Number | Schedule | Tasks - Quarterly |
| Frequency Unit | Day(s) - 1 | |
| Frequency | 1 | Target Start Date |
| Day(s) | 1 | Target Complete Date |
| Work Period Day(s) | 1 | Next Start Date |
| | | 24 March 2009 |
| | | 24 March 2009 |
| | | 25 March 2009 |

Figure 75 PM Generation Type – Schedule or Actual

The instruction below assumed an existing PM Schedule.

Here are the steps to amend PM Schedule and Tasks:

1. On **PM Schedule** (fixed time-based) **opening screen** of **Figure 70**, using the drop-down list **site selector** set your current working **site**. This will refresh the pm schedule listing.
2. Select **PM schedule** to open for modification by clicking on the **PM schedule number** on the **PM schedule listing**. This will open the schedule in the editing form shown in **Figure 72** above. By default, **PM Schedule Tab** will be the active tab.
3. Amend "**PM By**" accordingly.
4. Amend Asset, Location No or Inspection group accordingly.
5. Amend Task Number, Frequency fields and the work period.
6. Amend **next PM work order generation date** accordingly.

For Scheduled Completion Date (PM Generation):

- Change the **Target Start Date**.
Note that the amended **Target Start Date** determines when is the next generation of **PM work order**.

7. For Actual Completion Date (PM Generation):

- Change the **Next Start Date**.
Note that the amended **Next Start Date** determines when is the next generation of **PM work order**. Make sure you close the last PM work order of the PM Schedule before you amend the **Next Start Date**.

8. Finally, click  button to save the changes.
9. Finish.

Notes

1. The **amended dates** must be larger than the last PM Generation "To" date.
2. An existing PM Schedule next PM generation type (scheduled or actual completion dates) cannot be amended in the Current PM Screen. To change the generation type, the existing PM schedule must be disabled and a new PM schedule created.

6.3.4 How to Create – New PM Schedule (Fixed Day & Week)

This section describes *Fixed Day and Week Method of Scheduling*.

Figure 76: New PM Schedule (Fixed Day & Week)

Here are the steps to create new **PM Schedule (Fixed Day & Week)**:

1. On **PM Schedule (fixed time-based)** opening screen of **Figure 70**, using the drop-down list **site selector** set your current working site.
2. Click on the icon below to display a blank **new PM Schedule (Fixed Day & Week)** form as shown in **Figure 76** above.



3. Enter **PM Number** if you do not have it on auto-generate. Otherwise, you can leave it to the CMMS to generate a number for you. (Compulsory field)
4. Enter **PM Name**. (Compulsory field)
5. Enter **Work Type**. (Compulsory field)
6. Enter **Work Trade**. (Compulsory field)
7. Next, you select your '**PM By**' section accordingly.
You can set it to **Asset**, **Location** or **Inspection Group** and enter an appropriate description via the **ellipsis button**  (pop-up a listing of descriptions) for it in the allocated field.
8. Enter **Task Number** via the ellipsis button  (pop-up a listing of task numbers).
9. Enter **Frequency(Months)**, **Work Periods Days**, **Day of Week**, **Week of Month**, **Year** and **Start of Month**.
10. Enter **Target start Date**, **Target Complete Date** and **Next Date**.
11. Click **Save**.

*Note: After CMMS saved your PM schedule, the form will change to **modify/edit** PM schedule form so that you can continue to fill in the rest of the schedule. See next section.*

12. Finish.

Referring to figure above, the table below lists only the functions of the modified fields. Notice that the **Multiple Tasks Tab** is initially **not visible** in the form above. Similar to the fixed **time-based schedule** form, the **Multiple Tasks Tab** become visible only after you have saved the form.

The other fields are exactly as described before in the fixed interval **time-based schedule** form.

| DESCRIPTION OF SOME OF THE FIELDS | |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fields | Description |
| PM Number | <p>Identifier of the PM Schedule master record. By default this number is automatically generated and the checkbox is ticked as shown below.</p> <p><input checked="" type="checkbox"/> auto-generate</p> <p>Un-tick the checkbox if you prefer to enter each PM Number manually</p> |
| PM Name | <p>Description of the PM Schedule master record or a name. You must enter a name in this field.</p> <p>Compulsory field</p> |
| Work Type | <p>Classification of type of work order. Defaults to Preventive. <i>Read only field.</i></p> |
| Work Trade | <p>The trade or section that is primarily responsible for the work (obtained from the Work Trade Master)</p> <p>You must select one from the drop down menu.</p> <p>Compulsory field</p> |
| PM by | <p>Select one from: Asset or Location or inspection Group.</p> <p>Select whether PM Schedule is by one of the above.</p> |
| Asset No., Description | <p>Defines asset on which the preventive maintenance is to be done. Select the Asset from the drop down list. The asset must have been registered in the Asset Master for preventive maintenance scheduling. The Asset Location & Asset Status are retrieved from the Asset masters.</p> |
| Location No., Description | <p>Defines the physical location where the preventive maintenance is to be done. The physical location must have been registered in the Location master for preventive maintenance scheduling. Select the Location from the drop down list.</p> |
| Group No., Description | <p>Defines the Inspection group to associate with this PM Schedule.</p> |
| Task Number | <p>Defines the preventive maintenance task to assign to this schedule. You can select from the drop down list, which displays all registered tasks in PM Task master.</p> |

| | |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Frequency (Months) | Defines frequency of PM work order generation in number of months |
| Work Periods Days | Defines number of days required to complete PM Task. Default is 1 day |
| Day of Week | Select specific day of the week (Monday – Sunday) when you want to generate PM work order. Default is Sunday |
| Week of Month | Select specific week of the month (first, second, third, fourth or last week) when you want to generate PM work |
| Year | Specify starting year of the PM schedule |
| Start Month | Specify starting month of PM schedule. <i>Note:</i> The combination of Start Month, Week of Month and Day of Week must be larger than the current date and the last PM Generation date. |
| Target Start Date | (READ ONLY FIELD) Automatically calculated field. It displays target start date of PM work order, based on the specified week, day and start month and year. |
| Target Complete Date | Target Complete Date = Target Start Date + (Work Period Days - 1). |
| Next Date | This is a read only field which is automatically calculated. It displays the next target start date for the PM schedule based on the scheduling criteria. |

6.3.5 How to Modify – Old PM Schedule (Fixed Day & Week)

CURRENT PM SCHEDULE

 Welcome Elias Ishak
 Seconds before redirect: 1190
[Change Level](#)

Preventive Main Menu

List PM Schedules

New PM Schedule (Fixed Time)

New PM Schedule (Fixed Day & Week)

New PM Schedule (Fixed Date / Month)

New PM Event

Planner PM Schedule

Site : Cworks Malaysia

PM Schedule
Multiple Task

Update
Forecast

PM Number S001PM0027

PM Name Fixed Day & Week Schedule1

Work Type Preventive

Work Trade TM - Mechanical

PM By

Asset

Asset No. - Desc. A122-Asset 122 ... Clear

Asset Location L002-Store room

Asset Status Active

Location

Location No. - Desc. ... Clear

Inspection Group

Group No. - Desc. ... Clear

Task Number P01 - test pm ... Clear

Supplier Number - ... Clear

Employee ... Clear

Add into list ▼

| # | Employee Number | Employee Name | Option |
|---|-----------------|---------------|--------|
| | | | |

Frequency (Months) 1 Year 2011

Work Periods Days 1 Start Month March

Day of Week Tuesday Target Start Date 8 March 2011

Week of Month Second Week Target Complete Date 8 March 2011

Next Date 5 April 2011

PM Active

Update
Forecast

Figure 77: Modify/Edit – Old PM Schedule (Fixed Day & Week)

This section describes how to open an existing **PM Schedules (Fixed Day & Week)** for modification/editing.

Here are the steps to modify **existing PM Schedule (Fixed Day & Week)**:

1. On **PM Schedule** (fixed time-based) **opening screen** of **Figure 70**, using the drop-down list **site selector** set your current working **site**. This will refresh the pm schedule listing.
2. Select **pm schedule** to open for modification by clicking on the **pm schedule number** on the **pm schedule listing**. This will open the schedule in the editing form shown in **Figure 77** above. By default, **PM Schedule Tab** will be the active tab.
3. Edit the fields on this tab accordingly and when you finished this tab, click **Update button** to save your changes, before moving to the second tab.
4. Click **Multiple Task Tab** to make it active. See the next section on how to edit this tab's fields.
5. Finish.

6.3.5.1 How to Edit Multiple Task Tab (Fixed Day & Week)

CURRENT PM SCHEDULE Welcome **Elias Ishak**
Seconds before redirect: **1187**
[Change Level](#)

Preventive Main Menu | List PM Schedules | New PM Schedule (Fixed Time) | **New PM Schedule (Fixed Day & Week)** | New PM Schedule (Fixed Date / Month) | New PM Event | Planner PM Schedule

Site : Cworks Malaysia

PM Schedule | **Multiple Task**

Update Forecast

PM Number: **5001PM0027**
 PM Name: **Fixed Day & Week Schedule 1**
 Task Number: ... Clear
 Task Sequence: 2011-03-08 1
 Remarks:
 Save Into List ▼

| # | Task Number | Task Seq. | Start Date / Sequence | Remarks |
|--------------|-------------|-----------|-----------------------|---------|
| Delete All ▲ | | | | |

Update Forecast

Figure 78: Editing or Setting UP Multiple Task (Fixed Day & Week)

Here are the steps to create **multiple tasks (Fixed Day & Week)**:

1. On **PM Schedule** (fixed time-based) opening screen of **Figure 70**, using the drop-down list **site selector** set your current working **site**. This will refresh the pm schedule listing.
2. Select **pm schedule** to open for modification by clicking on the **pm schedule number** on the **pm schedule listing**. This will open the schedule in the editing form shown in **Figure 77** above. By default, **PM Schedule Tab** will be the active tab.
3. Click **Multiple Task Tab**.

4. Enter **Task Number** via the ellipsis () button.
5. Enter **Task Sequence** e.g. 100.
6. Select **Start at Date** via drop-down selection.
7. Select **Seq. Number** via drop-down selection.
8. Enter Description detail in **Remarks** field.
9. Click . This record will be added to the **Multiple Task List** and saved as one of the multiple tasks for this **PM Number**.
10. Repeat step (4) to (9) to add more tasks.
11. Click  to update the whole record.
12. Finish.

To delete all the pm tasks under **Multiple Task List** simultaneously, click . The CMMS will ask you to confirm your action before deletion will take place.

6.3.6 New PM Schedule (Fixed Date/Month)

This section describes **Fixed Date/Month Method of Scheduling**.

NEW PM SCHEDULE

 Welcome Elias Ishak
 Seconds before redirect: 1186
[Change Level](#)

Preventive Main Menu

List PM Schedules

New PM Schedule (Fixed Time)

New PM Schedule (Fixed Day & Week)

New PM Schedule (Fixed Date / Month)

New PM Event

Planner PM Schedule

Site : Cworks Malaysia

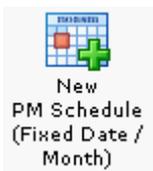
PM Schedule

| | | | |
|----------------------------------------|----------------------------------------------|-------------------------------------|-------------------------------------------------------------------------|
| PM Number | <input type="text"/> | <input checked="" type="checkbox"/> | auto-generate |
| PM Name | <input type="text"/> | | |
| Work Type | <input type="text" value="Preventive"/> | | |
| Work Trade | <input type="text" value="TM - Mechanical"/> | | |
| PM By | | | |
| <input checked="" type="radio"/> Asset | | | |
| Asset No. - Desc. | <input type="text"/> | | <input type="button" value="..."/> <input type="button" value="Clear"/> |
| Asset Location | <input type="text"/> | | |
| Asset Status | <input type="text"/> | | |
| <input type="radio"/> Location | | | |
| Location No. - Desc. | <input type="text"/> | | <input type="button" value="..."/> <input type="button" value="Clear"/> |
| <input type="radio"/> Inspection Group | | | |
| Group No. - Desc. | <input type="text"/> | | <input type="button" value="..."/> <input type="button" value="Clear"/> |
| Task Number | <input type="text"/> | | <input type="button" value="..."/> <input type="button" value="Clear"/> |
| Frequency (Monthly) | <input type="text" value="1"/> | Target Start Date | <input type="text"/> |
| | | | <input type="button" value="Clear"/> |
| Work Period Day(s) | <input type="text" value="1"/> | Target Complete Date | <input type="text"/> |
| | <input type="checkbox"/> Monthly | Next Start Date | <input type="text"/> |

Figure 79: Fixed Day/Month Scheduling Form

Here are the steps to create new **PM Schedule (Fixed Day & Week)**:

1. On **PM Schedule (fixed time-based) opening screen of Figure 70**, using the drop-down list **site selector** set your current working site.
2. Click on the icon below to display a blank **new PM Schedule (Fixed Date/Month) form** as shown in **Figure 79** above.



3. Enter **PM Number** if you do not have it on auto-generate. Otherwise, you can leave it to the CMMS to generate a number for you. (Compulsory field)
4. Enter **PM Name**. (Compulsory field)
5. Enter **Work Type**. (Compulsory field)
6. Enter **Work Trade**. (Compulsory field)
7. Next, you select your '**PM By**' section accordingly.
 You can set it to **Asset**, **Location** or **Inspection Group** and enter an appropriate description via the **ellipsis button**  (pop-up a listing of descriptions) for it in the allocated field.
8. Enter **Task Number** via the ellipsis button  (pop-up a listing of task numbers).
9. Enter **Frequency(Monthly)**, **Work Period Day(s)** and the checkbox **Monthly**.
10. Enter **Target Start Date**, **Target Complete Date** and **Next Start Date**.
11. Click **Save**.

*Note: After CMMS saved your PM schedule, the form will change to **modify/edit** PM schedule form so that you can continue to fill in the rest of the schedule. See next section.*

12. Finish.

The table below described the fields the new form shown in the **Figure 79** above.

The other fields are exactly as described in the fixed interval **time-based schedule** form.

| Field | Description |
|---------------------------|-----------------------------------------------------------------------------------------------------|
| Frequency(Monthly) | Defines the frequency of the Preventive Maintenance (PM) work order generation in number of months. |
| Work Period Day(s) | Defines the number of days, which shall be taken to complete the PM Task. Defaults to 1 day. |

| | |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Target Start Date | Click on the command button and select a target start date from the calendar. Note: The selected target start date must be larger than the current date and the last PM Generation date. The PM work orders will be generated on the selected date of each month in accordance to the preset frequency. |
| Target Complete Date | Target Complete Date = Target Start Date + (Work Period Days - 1). |
| Next Start Date | This is a read only field which is automatically calculated. It displays the next target start date for the PM schedule based on the scheduling criteria. |

Note: Fixed Day/Week and Fixed Date type Preventive Maintenance work orders are generated simultaneously with the Fixed Time Interval type PM work orders in the PM Generation form.

6.3.7 How to Modify – Old PM Schedule (Fixed Date/Month)

CURRENT PM SCHEDULE

 Welcome Elias Ishak
 Seconds before redirect: 1191
 Change Level

Preventive Main Menu

List PM Schedules

New PM Schedule (Fixed Time)

New PM Schedule (Fixed Day & Week)

New PM Schedule (Fixed Date / Month)

New PM Event

Planner PM Schedule

Site : Cworks Malaysia

PM Schedule
Multiple Task

Update
Forecast

PM Number: S001PM0028

PM Name: Fixed Date Month Sched 0

Work Type: Preventive

Work Trade: TM - Mechanical

PM By:

Asset

Asset No. - Desc. ... Clear

Asset Location

Asset Status

Location

Location No. - Desc. L002-Store room ... Clear

Inspection Group

Group No. - Desc. ... Clear

Task Number: F01 - test pm ... Clear

Supplier Number: - ... Clear

Employee: ... Clear

Add into list ▼

| # | Employee Number | Employee Name | Option |
|---|-----------------|---------------|--------|
| | | | |

Frequency (Monthly): 1 Target Start Date: 23 February 2011 Clear

Work Period Day(s): 1 Target Complete Date: 23 February 2011

Monthly Next Start Date: 23 March 2011

PM Active:

Update
Forecast

Figure 80: Modify/Edit – Old PM Schedule (Fixed Date/Month)

This section describes how to open an existing **PM Schedules (Fixed Date/Month)** for modification/editing.

Here are the steps to modify **existing PM Schedule (Fixed Date/Month)**:

1. On **PM Schedule** (fixed time-based) **opening screen** of **Figure 70**, using the drop-down list **site selector** set your current working **site**. This will refresh the pm schedule listing.
2. Select **pm schedule** to open for modification by clicking on the **pm schedule number** on the **pm schedule listing**. This will open the schedule in the editing form shown in **Figure 80** above. By default, **PM Schedule Tab** will be the active tab.
3. Edit the fields on this tab accordingly and when you finished this tab, click **Update button** to save your changes, before moving to the second tab.
4. Click **Multiple Task Tab** to make it active. See the next section on how to edit this tab's fields.
5. Finish.

6.3.7.1 How to Edit Multiple Task Tab (Fixed Date/Month)

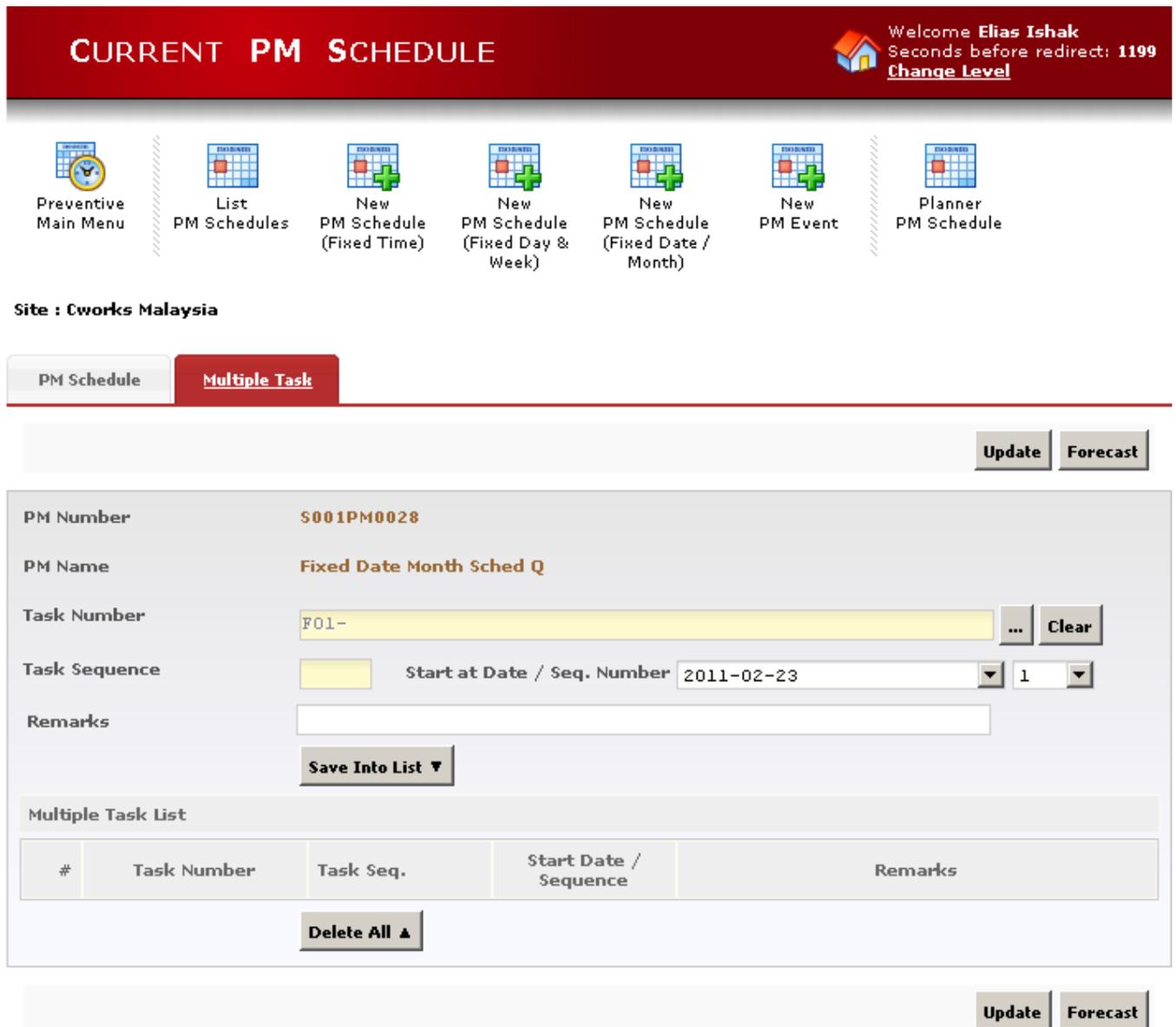


Figure 81: Editing or Setting UP Multiple Task (Fixed Date/Month)

Here are the steps to create **multiple tasks (Fixed Date/Month)**:

1. On **PM Schedule** (fixed time-based) **opening screen** of **Figure 70**, using the drop-down list **site selector** set your current working **site**. This will refresh the pm schedule listing.
2. Select **pm schedule** to open for modification by clicking on the **pm schedule number** on the **pm schedule listing**. This will open the schedule in the editing form shown in **Figure 81** above. By default, **PM Schedule Tab** will be the active tab.

3. Click **Multiple Task Tab**.
4. Enter **Task Number** via the ellipsis () button.
5. Enter **Task Sequence** e.g. 200.
6. Enter Description detail in **Remarks** field.
7. Click . This record will be added to the **Multiple Task List** and saved as one of the multiple tasks for this **PM Number**.
8. Repeat step (3) to (7) to add more tasks.
9. Click  to update the whole record.
10. Finish.

To delete all the pm tasks under **Multiple Task List** simultaneously, click . The CMMS will ask you to confirm your action before deletion will take place.

6.3.8 New PM Event

NEW PM SCHEDULEWelcome **Elias Ishak**
Seconds before redirect: **1200**
[Change Level](#)

Preventive Main Menu

List PM Schedules

New PM Schedule (Fixed Time)

New PM Schedule (Fixed Day & Week)

New PM Schedule (Fixed Date / Month)

New PM Event

Planner PM Schedule

Site : Cworks Malaysia

PM Schedule

PM Number auto-generate

PM Name

Work Type

Work Trade

PM By

Asset

Asset No. - Desc.

Asset Location

Asset Status

Location

Location No. - Desc.

Inspection Group

Group No. - Desc.

Figure 82: New PM Event

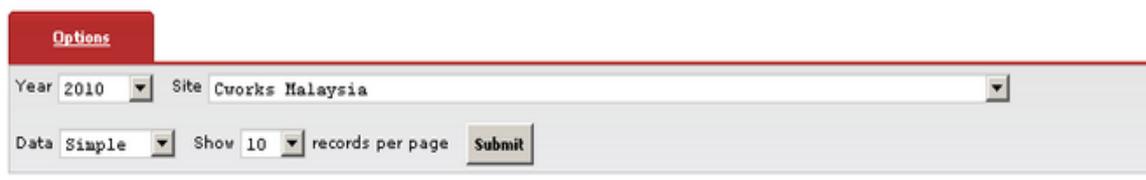
Creating a new PM Event is straight forward as shown by **Figure 82** above. Just fill in the form and click save and the CMMS will create it for you. It is just a basic PM schedule.

6.3.9 How to use – Planner PM Schedule

Here are the steps to use PM Schedule Planner:

1. On the opening screen of **Figure 70**, click  bring up **PM Schedule Planner** dialogue as shown below.

PM Forecast



The screenshot shows a web form titled "PM Forecast" with a red "Options" header. The form contains the following fields and controls:

- Year:** A dropdown menu with "2010" selected.
- Site:** A text input field containing "Cworks Malaysia" and a dropdown arrow on the right.
- Data:** A dropdown menu with "Simple" selected.
- Show:** A dropdown menu with "10" selected.
- records per page:** A label text.
- Submit:** A button.

2. Enter the target year, site.
3. Select **Data** mode (select **Simple** or **Details**).
4. Select **Show records per page**.
5. Click **Submit button**.

You will get a typical forecast of PM schedule as shown in **Figure 83** for **Simple** Data mode and **Figure 84** for **Details** Data mode below.

6. Finish.

PM Forecast

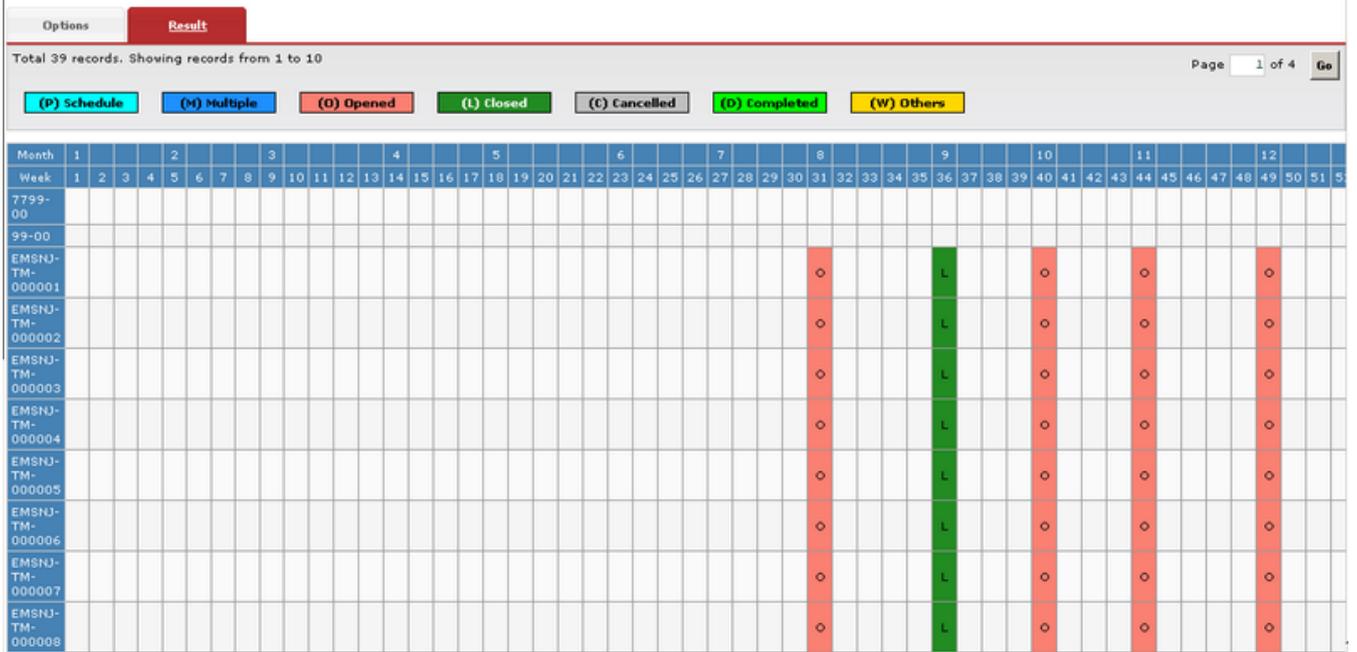


Figure 83: PM Schedule Planner (Data mode: Simple)

PM Forecast

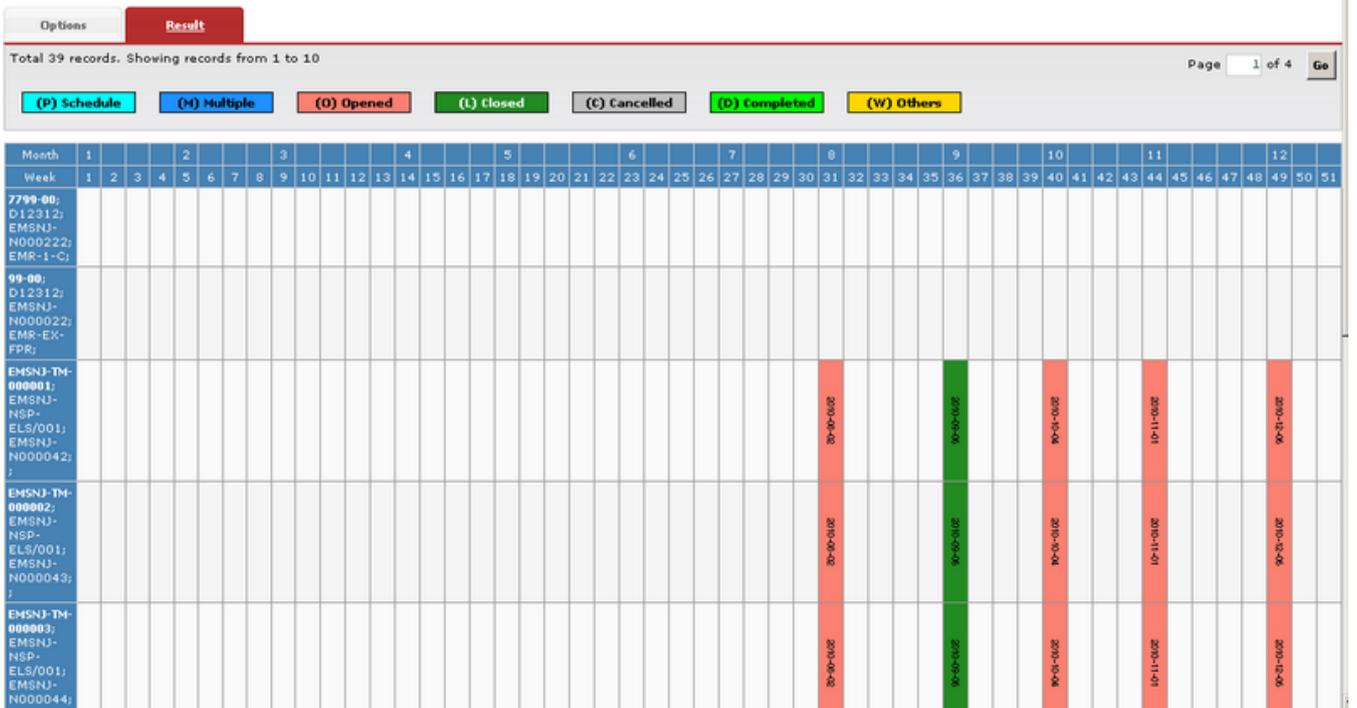


Figure 84: PM Schedule Planner (Data mode: Details)

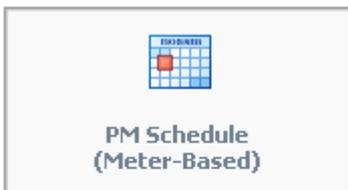
6.4 PM Schedule (Meter-Based)

PM schedule can be:

1. Based on a regular intervals of **meter readings** e.g. every 3000 miles or 5000 kM.
2. Based on **elapsed period of time** e.g. service once every 6 months etc.
3. Based on a combination of (1) and (2) such that a service is due based on whichever condition comes first.

These Metered PM Schedules are created in this module. At regular intervals of time, meter readings are taken and input into CWorks EASY for each meter. After all readings has been input, we run the generation of **Metered PM work orders**, for all metered schedules that show services are now due.

6.4.1 Opening Screen



Allows you to schedule a
meter-based preventive
maintenance

You can access **PM Schedule (Meter-based)** screen shown in **Figure 85** below by clicking the icon above which you can find on the **Preventive Maintenance (PM)** opening screen.

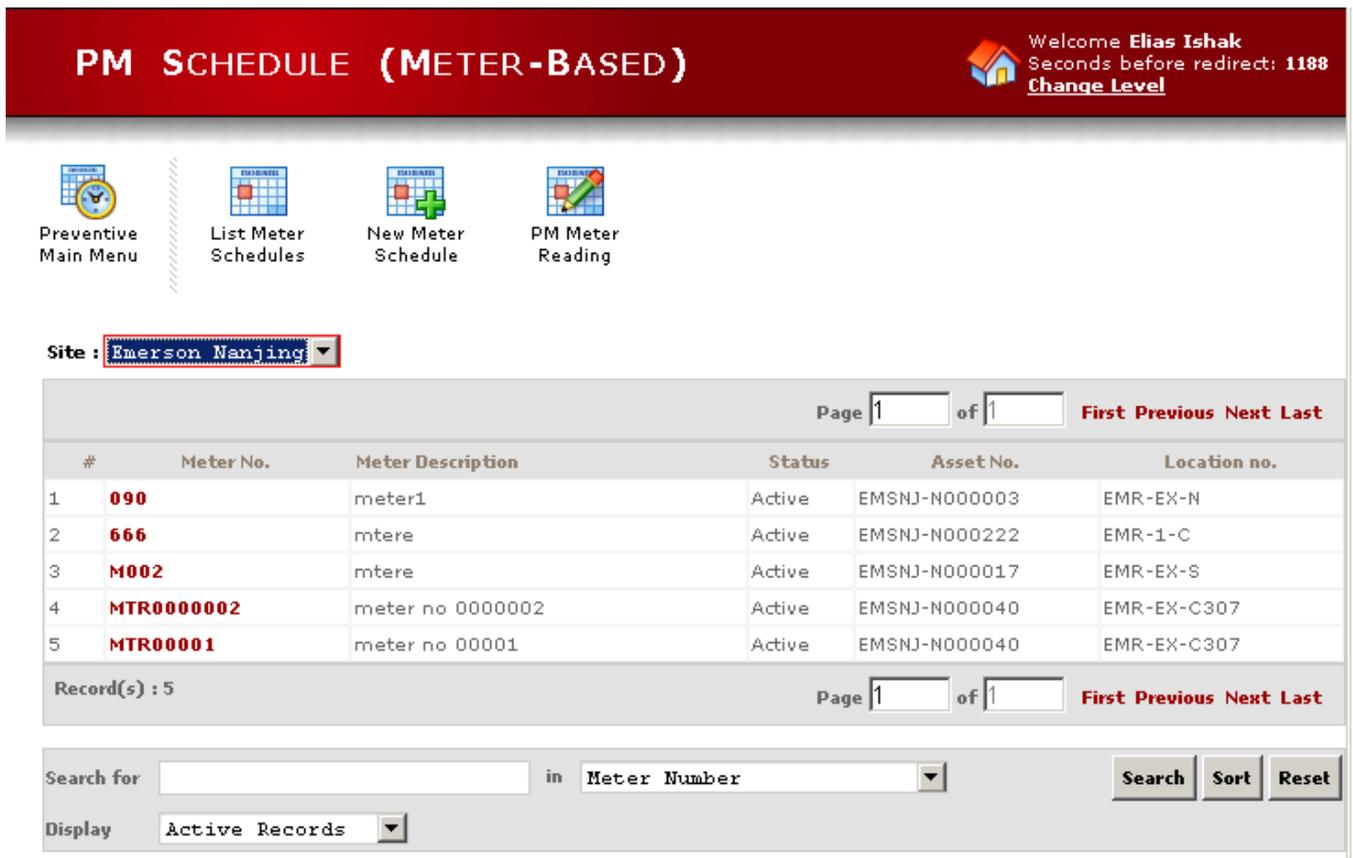


Figure 85: PM Schedule (Meter-based) Opening Screen

On the screen of **Figure 85**, you will find a line of **four menu icons**. The table below gives a brief description of each of these icons. Next, underneath these menu icons, you will find a drop-down list **site selector**. This selector allows you to set your **current working site**. Next, underneath this **site selector**, you will find the current full **PM meter-based schedule listing**. Finally, below this listing you will find the PM meter-based schedule **search facility**.

| PM SCHEDULE (METER-BASED) MAIN MENU DESCRIPTION | | |
|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| No. | Menu Icon | Description |
| 1. |  Preventive Main Menu | Go to Preventive Maintenance Main Screen |
| 2. |  List Meter Schedules | Go to PM Schedule (Meter-based) Opening Screen |

| | | |
|----|------------------------------------------------------------------------------------------------------------|-----------------------------------------|
| 3. |  New Meter Schedule | Create New Meter Schedule |
| 4. |  PM Meter Reading | Display Past Meter reading of any meter |

Metered PM Schedule can be one of the following three types:

1. **Threshold meters** (only the upper and lower limits are important as the triggers for a Service Due on an Asset or facility).
2. **Incremental meters** (the fixed meter intervals are important as the **criteria** for a **Service Due** on an asset or a facility)
3. **The incremental meter intervals and the elapsed time** (both are considered important and each can meet the **asset** or **facility Service Due criteria** independently. Whichever comes first, the maintenance service will be carried out on the asset or facility).

6.4.2 How to Create – New Metered PM Schedule

PM SCHEDULE (METER-BASED)

 Welcome **Elias Ishak**
 Seconds before redirect: **1188**
[Change Level](#)



Preventive
Main Menu



List Meter
Schedules



New Meter
Schedule



PM Meter
Reading

Site : Emerson Nanjing

PM Meter

PM Meter Information

Meter No.

Meter Name

Work Trade

Status

Asset Information

Asset No. - Description

Asset Location

Type of Meter

Unit of Measurement

Meter Type

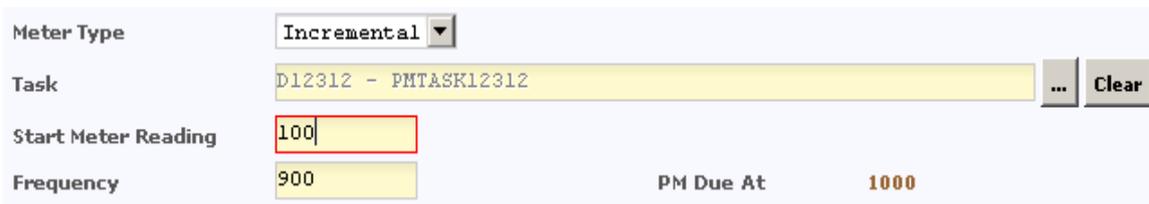
Figure 86: PM Schedule (Metered) – New PM Schedule (Meter-Based) Form

Here are the steps to create new **Metered PM** schedules:

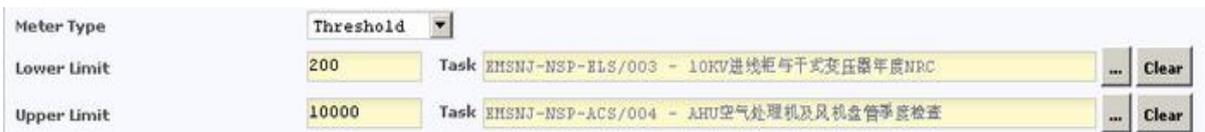


1. On the screen of **Figure 85**, click . This will open the new **Meter-based PM Schedule form** shown in **Figure 86**.
2. Fill in the **Meter No.** and the **Meter Name** fields.
3. Select **Work Trade** using the drop-down list.
4. Select **Status** as 'Active'.

5. Select **Asset No. Description** using the ellipsis button, . Immediately, following the selection, the CMMS will fill the **Asset Location** detail. (Provided this information has been input in the first place as a part of the set up details for the asset.)
6. Enter **Unit of Measurement**, for example: hours, units, liters, meters, etc.
7. Select **meter type (Threshold or Incremental)** using the drop-down list. The choice of meter type selection at this point will trigger an appropriate addition to the form display. Whichever type of selection you made, fill in the appropriate additional form accordingly. Shown below are the additional forms for both meter types (see the table below for field descriptions).



Above is the additional form for Incremental Meter Type.



Above is the additional form for Threshold Meter Type.

8. After filling in the appropriate form above, click  to save the changes. Note: After saving the changes, the form will switch to the editing form (see next section on how to edit existing form).
9. Finish.

| Description of PM Metered schedule Form | | |
|-----------------------------------------|-------------------|-----------------------------------------------------------------------------------|
| No. | Field | Description |
| 1. | Meter No | A unique number for identifying the meter. Duplicate meter number is not allowed. |
| 2. | Meter Name | A name for the meter. |
| 3. | Work Trade | The trade or section that is primarily responsible for the |

Description of PM Metered schedule Form

| No. | Field | Description |
|-----|--------------------------------|----------------------------------------------------------------------------------------------------------------------|
| | | work (obtained from the Work Trade Master) |
| 4. | Status | Active or Inactive. Default is Active for new schedule. (Drop-down list selection) |
| 5. | Asset No. – Description | Select the asset number to be associated with this meter and the PM Task to be generated. (Drop-down list selection) |
| 6. | Asset Location | Displays the location of the asset. Default data based on the selected asset |
| 7. | Unit of Measurement | Enter the meter units. Alphanumeric field up to 50 characters. |
| 8. | Meter Type | Incremental or Threshold . Default is Blank. |

Description of Threshold Meter Type Fields

| No. | Field | Description |
|-----|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Meter Type | By default , this is not set on the new form. You must select Threshold to select this option. Threshold type metered PMs are typically used in condition monitoring. PM Tasks are generated when the meter value exceeds or falls below the upper and lower limits defined in this record. |
| 2. | Lower Limit | Specify the lower limit of the meter. Any logged meter reading below the lower limit will flag for a PM work order to be generated. |
| 3. | Upper Limit | Specify the upper limit of the meter. Any logged meter reading above the upper limit will flag for a PM work order to be generated. |
| 4. | PM Task No (Lower Limit) | Specifies the PM Task to be generated when the logged meter reading is below the Lower Limit defined in this record. |
| 5. | PM Task No (Higher Limit) | Specifies the PM Task to be generated when the logged meter reading is above the Higher Limit defined in this record. |

Description of Incremental Meter Type Fields

| No. | Field | Description |
|-----|-------------------|--------------------------------------------------------------------------------------------------|
| 1. | Meter Type | INCREMENTAL. By default , this field is not set on the new form. You |

| | | |
|----|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | <p>must select Incremental yourself.</p> <p>Incremental type PMs are generated based on meter readings reaching a preset value based on the last meter reading and the increment value.</p> |
| 2. | Task | Select PM Task from a drop-down list. |
| 3. | Start Meter Reading | Enter the last PM meter reading. The next PM Due is based on this reading. |
| 4. | Frequency | Enter meter increment for which PM work order is flagged as ready for generation. |
| 5. | PM Due at | <p>Calculated field. (Start Meter Reading + Frequency).</p> <p>It indicates when to flag (trigger) PM work order as ready for generation.</p> |

6.4.3 How to Edit Existing Metered PM Schedule

PM SCHEDULE (METER-BASED)

 Welcome **Elias Ishak**
 Seconds before redirect: **1181**
[Change Level](#)



Preventive Main Menu



List Meter Schedules



New Meter Schedule



PM Meter Reading

Site : Emerson Nanjing

PM Meter
Multiple Task

update

PM Meter Information

Meter No. **MA10**

Meter Name

Work Trade

Status

Asset Information

Asset No. - Description ... Clear

Asset Location **EMR-EX-N-External North Area** 外国北区

Type of Meter

Unit of Measurement

Meter Type

Task ... Clear

Start Meter Reading **100** Last Meter Reading **100**

Frequency PM Due At **1000**

update

Figure 87: Editing Existing Metered PM Schedule (Incremental)

Here are the steps to edit existing metered PM Schedule:

1. On the screen of **Figure 85**, from the listing of **Meter-based PM Schedules** click on the schedule number to select and open it for editing as shown in **Figure 87** above.
2. Modify any editable fields on the PM Tab accordingly.

3. Click **update** to save the changes on this tab.
4. Click **Multiple Task Tab** to make it active so that you can add multiple tasks.
5. Select **Task Number** via the ellipsis button.
6. Enter a **number** into **Task Sequence** field.
7. Enter a remark in the **Remarks** field.
8. Click **Save Into List** to save the sequence above into Multiple Task list.
9. Add multiple tasks are required and you should see something similar to the figure below.

The screenshot shows the 'PM SCHEDULE (METER-BASED)' interface. At the top, there is a navigation bar with a home icon, the user name 'Welcome Elias Ishak', and a countdown timer 'Seconds before redirect: 1186' with a 'Change Level' link. Below the navigation bar are four icons: 'Preventive Main Menu', 'List Meter Schedules', 'New Meter Schedule', and 'PM Meter Reading'. The site name 'Site : Emerson Nanjing' is displayed. The 'Multiple Task' tab is selected. The main form contains the following fields:

- PM Number:** MA10
- PM Name:** Operational Hours
- Task Number:** EMSNJ-WB-Varnishing - 木质/竹质地板上对地剂/木地板蜡 (Sanding & Var... [Dropdown] [Clear]
- Task Sequence:** 3
- Remarks:** Task GF500

Below the form is a 'Multiple Task List' table:

| # | Task Number | Task Seq. | Remarks |
|---|---------------------|-----------|------------|
| 1 | EMSNJ-SSP | 2 | Task KM189 |
| 2 | EMSNJ-WB-Varnishing | 3 | Task GF500 |

Buttons for 'update', 'Save Into List', and 'Delete All' are visible.

10. Click Update to save your changes.
11. Finish.

6.4.4 How to Add new reading, Generate Work Orders using PM Meter Reading



PM Meter Reading

You can access **PM Meter Reading screen** as shown in **Figure 88** below by clicking the icon above.

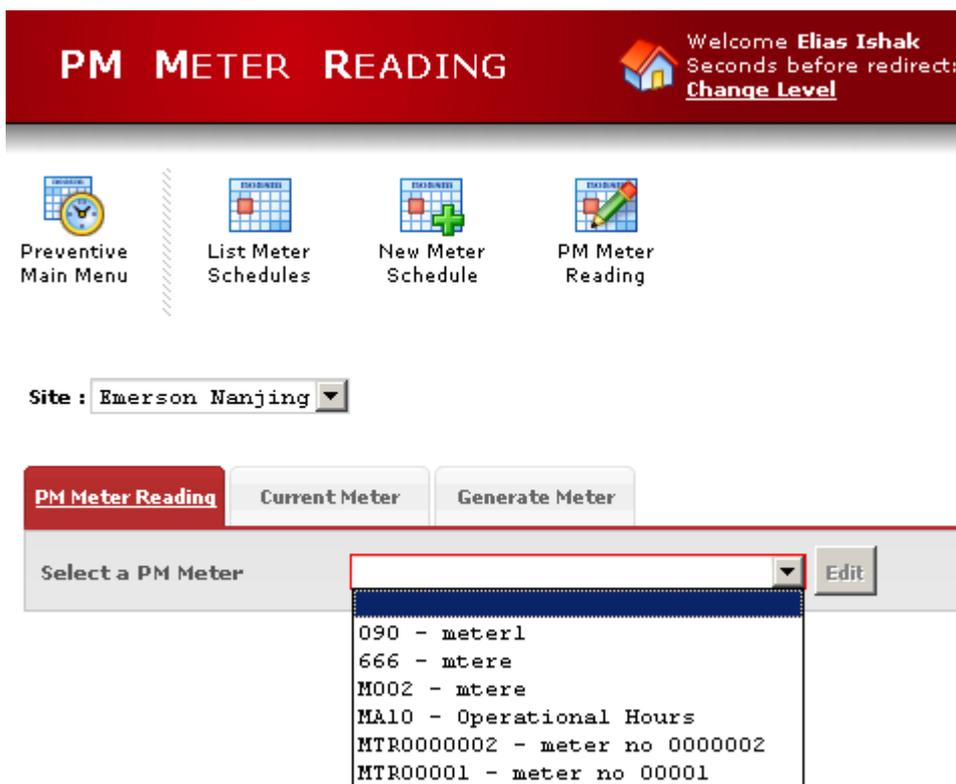


Figure 88: PM Meter Reading



PM Meter Reading

1. On the screen of **Figure 85**, go to PM Meter reading by clicking
2. Select a **PM meter** you want to add a new meter reading or view, via the drop-down list provided. The display should give something similar to that shown below.

Site : Emerson Nanjing

PM Meter Reading

Current Meter

Generate Meter

Select a PM Meter 090 - meter1

Current Reading pcs

Reading Date

PM Meter Details

| | | | |
|-----------------|-----------------|--------------|------------------------------|
| Work Trade | TM - Mechanical | Asset No. | EMSNJ-N000003 1#000000 |
| Meter Type | Incremental | Location No. | EMR-EX-N External North Area |
| Last Work Order | | PM Type | Schedule |

Reading

| | | | |
|-----------|---------------|--------------|-----------------|
| Frequency | Start Reading | Last Reading | Expected PM Due |
| 20 pcs | 0 pcs | 20 pcs | 40 pcs |

Meter History

| # | Reading Date | Meter No. | Curr. Reading | Gen. Status | Active Status | Gen. Date |
|---|---------------------|-----------|---------------|-------------|---------------|-----------|
| 1 | 2011-02-01 11:18:00 | 090 | 20 | No | Yes | |
| 2 | 2011-01-14 14:29:00 | 090 | 20 | Yes | Yes | |
| 3 | 2011-01-13 17:02:00 | 090 | 11 | No | Yes | |

- If you have a new meter reading to log, enter the reading into the **Current Reading** field. Then click **save**.

The CMMS will enter this latest value at the top of the listing on this tab as shown below.

Site : Emerson Nanjing

PM Meter Reading
Current Meter
Generate Meter

Select a PM Meter 090 - meter1 Edit

Current Reading pcs

Reading Date Clear

Save

PM Meter Details

| | | | |
|-----------------|-----------------|--------------|------------------------------|
| Work Trade | TM - Mechanical | Asset No. | EMSNJ-N000003 1#000000 |
| Meter Type | Incremental | Location No. | EMR-EX-N External North Area |
| Last Work Order | | PM Type | Schedule |

Reading

| | | | |
|-----------|---------------|--------------|-----------------|
| Frequency | Start Reading | Last Reading | Expected PM Due |
| 20 pcs | 0 pcs | 40 pcs | 60 pcs |

Meter History

| # | Reading Date | Meter No. | Curr. Reading | Gen. Status | Active Status | Gen. Date |
|---|---------------------|-----------|---------------|-------------|---------------|-----------|
| 1 | 2011-02-03 14:52:00 | 090 | 40 | Yes | Yes | |
| 2 | 2011-02-01 11:18:00 | 090 | 20 | No | Yes | |
| 3 | 2011-01-14 14:29:00 | 090 | 20 | No | Yes | |
| 4 | 2011-01-13 17:02:00 | 090 | 11 | No | Yes | |

4. From above the **Gen. Status column** ("Yes") in the Meter History indicates that PM is due. The CMMS needs to generate the work order this meter.

- Click **Generate Meter Tab** to make it active as shown below. To generate the work order for this PM, you need to click the **Generate**.

Site : Emerson Nanjing

The screenshot shows a software interface with three tabs: 'PM Meter Reading', 'Current Meter', and 'Generate Meter' (which is highlighted in red). Below the tabs are two buttons: 'Generate' and 'Print PM WD'. The main content area is divided into two sections:

Incremental Meter

| # | Workorder No. | Meter No. | Meter Desc. | Asset No. | Task No. | Current Reading | PM Due |
|---|---------------|-----------|-------------|---------------|-------------------|-----------------|--------|
| 1 | | 090 | meter1 | EMSNJ-N000003 | EMSNJ-NSP-ACS/004 | 20 | 40 |
| 2 | | 090 | meter1 | EMSNJ-N000003 | EMSNJ-NSP-ACS/004 | 40 | 60 |

Threshold

| # | Workorder No. | Meter No. | Meter Desc. | Asset No. | Low Limit | Low Task No. | Reading. | Upper Limit. | Upp Task No. |
|------------|---------------|-----------|-------------|-----------|-----------|--------------|----------|--------------|--------------|
| No Record. | | | | | | | | | |

- When you click **Generate**, the CMMS will generate the Work Orders for the services due above.

Note: This tab display will be empty after the work orders have been generated.

- Finish.

6.5 PM Generation

This section described how to access the **Automatic** generation of **PM Work Orders** for *time-based* scheduled. It is use for automatic generation of PM Work Orders for time-based PM schedules

6.5.1 Opening Screen



PM Generation

Allows you to auto-create Work Orders from all the active PM schedules, according to specified timeframe

You can access **PM Generation screen** shown in **Figure 89** below by clicking the icon above which you can find on the **Preventive Maintenance (PM) opening screen**. As it is, there are no work orders yet.

PM GENERATION
Welcome Admin
Seconds before redirect: 894
[Change Level](#)

Preventive Main Menu

Site: Emerson Nanjing

PM Generation

| | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Last PM Generated Date | 21 January 2011 |
| Last Date Range of PM WO Generated | 5 July 2013 |
| Date for PM to be Generated | <input style="width: 100%;" type="text"/> <input type="button" value="Clear"/> |
| <input type="button" value="View PM"/> <input type="button" value="Open PM WO"/> <input type="button" value="Export PM Forecast"/> <input type="button" value="Print"/> | |

Schedule PM

| # | PM Number | PM Name | PM WO No | PM WO Raise | Task Number | Asset No. | Location No. | Group No. | Target Start | Target Complete | Next PM Date |
|---|-----------|---------|----------|-------------|-------------|-----------|--------------|-----------|--------------|-----------------|--------------|
| | | | | | | | | | | | |

Actual Complete Date PM

| # | PM Number | PM Name | PM WO No | PM WO Raise | Task Number | Asset No. | Location No. | Target Start | Target Complete | Next PM Date |
|---|-----------|---------|----------|-------------|-------------|-----------|--------------|--------------|-----------------|--------------|
| | | | | | | | | | | |

Figure 89: PM Generation Screen

| PM GENERATION FORM – Entry Fields | | |
|-----------------------------------|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| No. | Fields | Description |
| 1. | Last PM Generated Date | Displays the <i>last generated date</i> of the <i>last PM work order</i> generated (read only field). |
| 2. | Last Date Range of PM WO Generated | Displays the <i>date range</i> of the last generated PM work order (read only field) |
| 3. | Date for PM to be generated | Input Fields for the <i>next date range</i> of Target Start Dates. Any PM records whose <i>next PM Target Start Date</i> falls within this <i>date range</i> will be included for generation |
| 4. |  | This button will generate a listing of <i>PM Work Orders</i> for specified input <i>date range</i> . This is for viewing. |
| 5. |  | This button will generate the final version of the preliminary listing of PM Work Orders. |
| 6. |  | <i>Export to Excel Option</i> This button gives you the Option to export the <i>Preview output</i> and the <i>Finalized output listing</i> to Excel spreadsheet. |
| 7. |  | Click this button to print. |
| 8. |  | Sent this report to BiRT for external report processing. |
| 9. |  | Click this icon, to exit and return to Preventive Maintenance Opening screen. |

6.5.2 How to Generate Time-Based PM Work Orders

Here are the steps to generate **PM Work Orders** (for previewing, final listing, exporting to Excel and printing):

1. To generate output listing of **PM Work Orders**, enter date range into [**Date for PM to be generated**] field via the calendar icon, .



2. Click .
3. The CMMS will output the list all PM Work Orders within your specified date range as shown below. Note this is for viewing and is not the final output listing.



| # | PM Number | PM Name | PM WO No | PM WO Raise | Task Number | Asset No. | Location No. | Group No. | Target Start | Target Complete | Next PM Date |
|---|-----------------|--------------|----------|-------------|-------------------|---------------|--------------|-----------|--------------|-----------------|----------------|
| 1 | EMSNU-TM-000033 | 00000 000 | | | EMSNU-NSP-ELS/001 | EMSNU-N000113 | | | 15 July 2013 | 21 July 2013 | 12 August 2013 |
| 2 | EMSNU-TM-000034 | 00000 000 | | | EMSNU-NSP-ELS/001 | EMSNU-N000114 | | | 15 July 2013 | 21 July 2013 | 12 August 2013 |
| 3 | EMSNU-TM-000035 | 00000 000 | | | EMSNU-NSP-ELS/001 | EMSNU-N000115 | | | 15 July 2013 | 21 July 2013 | 12 August 2013 |
| 4 | EMSNU-TM-000036 | 00000 000 | | | EMSNU-NSP-ELS/001 | EMSNU-N000116 | | | 15 July 2013 | 21 July 2013 | 12 August 2013 |

4. You can stop here if you were only viewing this listing.
5. On the other hand, if you want to finalize and printing the work orders, then continue to the next steps.
6. Click on  to generate the finalized PM Work Orders. The PM list will be updated with the work order number displayed for reference.
7. click  to print the generated PM work order.
8. Finish.

6.6 Inspection Groups



Group by Asset or Locations

You can access **Inspection Groups screen** shown in **Figure 90** below by clicking the icon above on the **Preventive Maintenance (PM) opening screen**.

The Inspection group allows assets or locations to be organized as a group. For example, it makes good economic sense and practice to schedule a service for a group of assets or locations together. Each inspection group can be set to either one of two distinct types: '**Asset Group**' or '**Location Group**'. Each type will have its own data entry form that allows assets or locations, depending on the type, to be added to the group and saved into a list.

6.6.1 Opening Screen

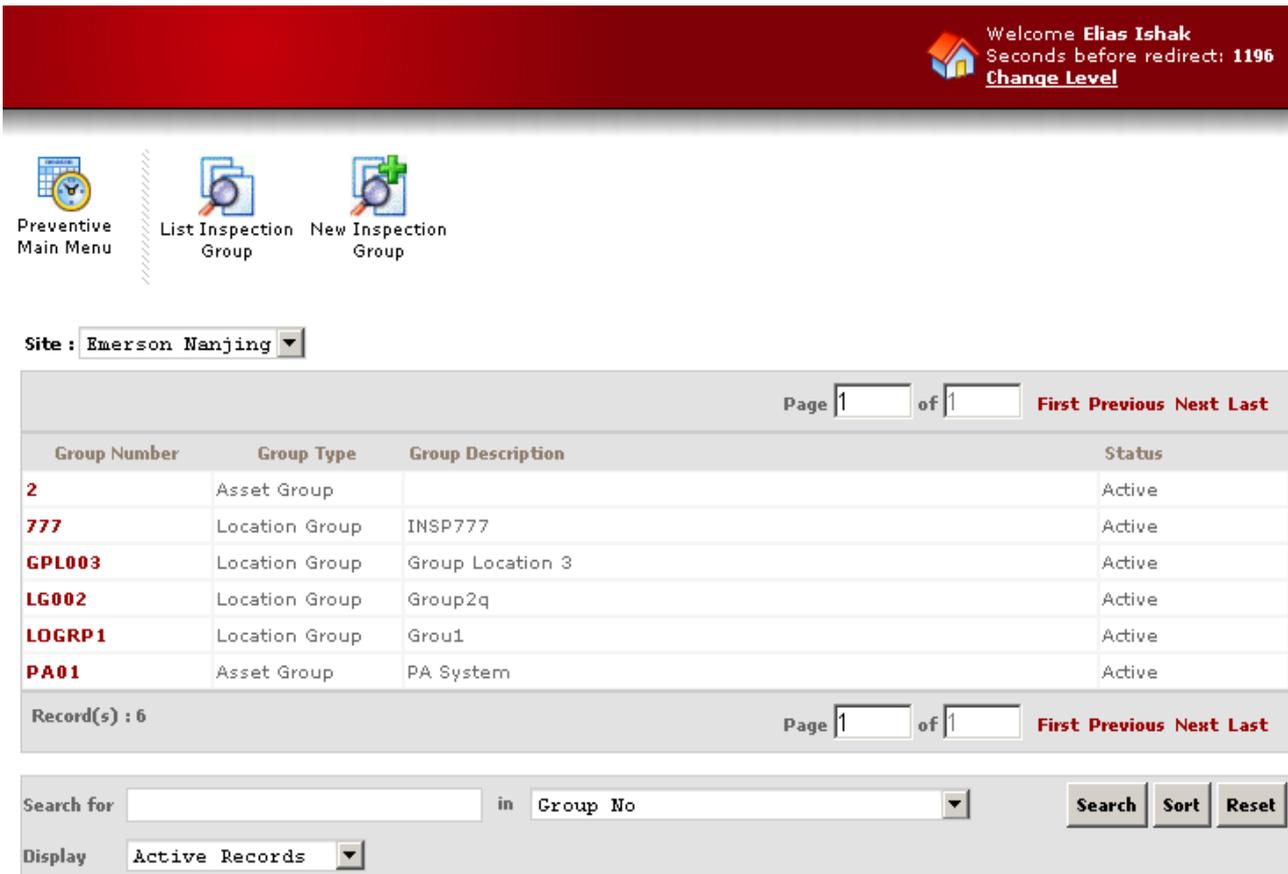


Figure 90: Inspection Groups Opening Screen

The opening screen automatically list all the inspection groups if any. Any group record can be opened for editing by clicking on the group number.

| Inspection Group Opening Screen Menu Icons | | |
|--------------------------------------------|--------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| No. | Menu Icon | Description |
| 1. |  Preventive Main Menu | Click this icon, to exit and return to Preventive Maintenance Opening screen. |
| 2. |  List Inspection Group | Return to you to the output listing of all groups |
| 3. |  New Inspection Group | Create a new group |

The table above shows the menu icons found on the opening screen of the inspection group.

6.6.2 How to Create a New Inspection Group

Figure 91: A Blank Inspection Group Data Entry Form

Here are the steps to create a **new inspection group**:



1. On the screen of **Figure 90**, click **New Inspection Group** to open new **inspection group form** shown in **Figure 91**.
2. Enter **Group Number**.
3. Enter **Group Description**.
4. Select **Type** via drop-down list.



Note: For Type, please select one of the two types (shown as drop-down options above). Type '**Asset Group**' allows only assets to be added as members of the group while Type '**Location**

Group allows only locations to be added as members of the group. Consequently, the Type determines the editing form that will be displayed after the user click the Save button.

5. Enter **total area**.
6. Click **Save** to save the details and complete this data entry.

It will also create this **Inspection Group record**.

Note: After saving the details in a new Inspection Group record, the CMMS will load these details into the editing form shown in **Figure 92** in the next section. Also, see the next section on how to modify/edit/change any existing Inspection Group records.

7. Finish.

6.6.3 How to Open Existing Inspection Group Record for Modification



Group Details

| | |
|-------------------|-------------------------------------|
| Group Number | GAC001 |
| Group Description | Group Aircond 1 |
| Type | Asset Group |
| Total Area | 4000 sq m |
| Status | <input checked="" type="checkbox"/> |

| | |
|-----------------|-------------------------------------------------------------------------|
| Sequence Number | <input type="text"/> |
| Asset Number | <input type="text"/> |
| | <input type="button" value="..."/> <input type="button" value="Clear"/> |
| | <input type="button" value="Save"/> |

| Seq.No. | Asset Number | Location Number | Description | Option |
|---------|--------------|-----------------|--------------|--------|
| 1 | AC001 | R-001 | Air Cond 001 | DELETE |
| 2 | AC002 | R-002 | Air Cond 002 | DELETE |
| 3 | AC003 | R-003 | Air Cond 003 | DELETE |

Figure 92: Inspection Group (Type 'Asset Group') that has been opened for Editing/Modification in the Editing Form unique to this Type



Group Details

Group Number CI-001

Group Description Cleaning 1

Type Location Group

Total Area 3500 sq.m

Status

Sequence Number

Location Number

| Seq.No. | Asset Number | Location Number | Description | Option |
|---------|--------------|-----------------|------------------------|--------|
| 1 | | R-001 | Operation Manager Room | DELETE |
| 2 | | R-002 | Finance Manager Room | DELETE |

Figure 93: Inspection Group (Type 'Location Group') that has been opened for Editing/Modification in the Editing Form unique to this Type

Here are the steps to open and modify any **inspection group** record:

1. From the **inspection group listing** of **Figure 90**, select the inspection group record by clicking on its **group number**. The form into which it will be loaded, will depend on the **Type** attribute of this record. The Type for this record can be viewed from the Type field as shown below.



If the **Type** attribute is '**Asset Group**', then the record will be opened into the editing form

of **Figure 92** above. Otherwise, it will be opened into the editing form shown in **Figure 93**.

2. Enter **Sequence Number**.

3. If Type is '**Asset Group**', select an **Asset Number** by clicking on the ellipsis button 



| Seq.No. | Asset Number | Location Number | Description | Option |
|---------|--------------|-----------------|--------------|--------|
| 1 | AC001 | R-001 | Air Cond 001 | DELETE |
| 2 | AC002 | R-002 | Air Cond 002 | DELETE |
| 3 | AC003 | R-003 | Air Cond 003 | DELETE |

shown above to pop-up a listing of assets from which one can be selected.

Otherwise, the Type is '**Location Group**' then select a **Location Number** by clicking on the ellipsis button shown below to pop-up a listing of locations from which one can be selected.



| Seq.No. | Asset Number | Location Number | Description | Option |
|---------|--------------|-----------------|------------------------|--------|
| 1 | | R-001 | Operation Manager Room | DELETE |
| 2 | | R-002 | Finance Manager Room | DELETE |

4. Click  to save the above entries into the listing below the save button.

5. Repeat steps (2) to (4) as needed.

Note: You can delete any inputted entry (asset or location) by clicking the **DELETE** link corresponding to the entry.

6. Click  to update the record and save the changes.

7. Finish.

7. EMPLOYEES



ACCESSING EMPLOYEE

You can access **Employee** on **CWorks EASY opening screen** by clicking the **icon** on the left, which will open the **Employee Opening Screen**.

The Employee module allows you

to register and manage your **Employees**. Through this module, you can register and record **Employees** relevant information such as personal details, skill set, qualifications that are important to maintenance operation and efficiency.

7.1 Employees Opening Screen

Figure 94 shows the **Employees Opening Screen**. When you open this **screen**, the CMMS will automatically list all the employees. In addition, you will also find employee search facility.



As always, make sure you are at the **correct site** as shown above. If not, use the **current site selector** to change it accordingly.

EMPLOYEES
Open Requests : 1
Welcome Admin
Seconds before redirect: 902
[Change Level](#)


List Employees


New Employee


Admin Group

Site : Emerson Nanjing

| Emp. / Req. Number | Name | Designation | Department | Category | Status |
|--------------------|--------------|----------------------|-------------------|----------|--------|
| EMSJN-A001 | Admin | Cworks Administrator | FM - Sodexho Team | Employee | Active |
| EMSJN-015 | □□□ | | FM - Sodexho Team | | Active |
| EMSJN-8666 | □□□ | □□□□ | FM - Sodexho Team | Employee | Active |
| EMSJN-A0003 | □□□ | □□□□□ | FM - Sodexho Team | Employee | Active |
| EMSJN-A002 | William Shi | UM | FM - Sodexho Team | | Active |
| EMSJN-A003 | □□-Henlen Hu | □□ | FM - Sodexho Team | Employee | Active |
| EMSJN-A004 | □□-Clara Liu | □□□□ | FM - Sodexho Team | Employee | Active |
| EMSJN-A005 | □□-Zoe Fang | Receptionist | FM - Sodexho Team | Employee | Active |
| EMSJN-A006 | □□□ | Clean supervisor | FM - Sodexho Team | Employee | Active |
| EMSJN-A007 | □□□ | Cleaner | FM - Sodexho Team | Employee | Active |

Record(s) : 193

Page 1 of 20
[First](#) [Previous](#) [Next](#) [Last](#)

Search

[Export to Excel](#)
[Reset](#)
[Search](#)

Emp No
 Emp Name
 Designation
 Department
 Category

Display Active Records

Figure 94: Employees Opening Screen

7.2 How to Add New Employee

NEW EMPLOYEE
Open Requests : 1
Welcome Admin
Seconds before redirect: 901
[Change Level](#)


List Employees


New Employee

save

| | | | |
|-----------------|-----------------------------------------------------------------------------------------|-------------|----------------------------------------------------------------------------|
| Employee No. | <input style="width: 90%;" type="text"/> | Site Code | Emerson Nanjing |
| Full Name | <input style="width: 90%;" type="text"/> | Department | |
| Category | <input checked="" type="radio"/> Employee <input type="radio"/> Customer | Status | <input checked="" type="radio"/> Active <input type="radio"/> Inactive |
| Designation | <input style="width: 95%;" type="text"/> | | |
| Address | <div style="border: 1px solid gray; height: 30px; width: 95%;"></div> | | |
| Office Location | <input style="width: 95%;" type="text"/> | | |
| Email | <input style="width: 95%;" type="text"/> | | |
| Work Phone | <input style="width: 80%;" type="text"/> Ext. <input style="width: 40px;" type="text"/> | Fax | <input style="width: 80%;" type="text"/> |
| Mobile Phone | <input style="width: 80%;" type="text"/> | House Phone | <input style="width: 80%;" type="text"/> |
| Hourly Salary | <input style="width: 80%;" type="text"/> | Over Time 1 | <input style="width: 80%;" type="text"/> |
| Over Time 2 | <input style="width: 80%;" type="text"/> | Over Time 3 | <input style="width: 80%;" type="text"/> |

save

Figure 95: New Employee Blank Form

Note: Once you register an employee, you cannot change the employee number

Figure 95 above shows the **New Employee** form.

To add a **new employee** follow the steps below:

1. On the **Employees opening screen** of **Figure 94**, set the **current site selector** to the correct **site** where you will place the new employee. The CMMS will refresh the employee listing automatically when the site changes.



2. Click **New Employee** to open a blank **New** employee form as shown in **Figure 95**.
3. Fill in employee details into the form fields as shown below.

4. Click **Save** to save the new employee record.

You will get the message below after the record is successfully saved.



Click OK to get rid of the message and the screen will change to that shown below.

| | | | |
|-----------------|--------------------------------------------------------------------------|-------------|------------------------------------------------------------------------|
| update | | | |
| Employee No. | 002 | Site Code | Cworks Malaysia |
| Full Name | John Baker | Department | Order Management |
| Category | <input checked="" type="radio"/> Employee <input type="radio"/> Customer | Status | <input checked="" type="radio"/> Active <input type="radio"/> Inactive |
| Designation | Junior Assistance Service Manager | | |
| Address | 88 Bakersfield, Memphis, Tennessee. USA | | |
| Office Location | Memphis, Tennessee | | |
| Email | | | |
| Work Phone | 10427781245 | Ext. | 8 |
| Mobile Phone | | Fax | |
| Hourly Salary | 30.00 | House Phone | |
| Over Time 2 | 60.00 | Over Time 1 | 45.00 |
| | | Over Time 3 | |
| update | | | |

Notice how the **Save** button has now changed to **Update** button.

5. Finish.

7.3 How to View and Modify Employee/ Requester Details

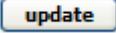
The screenshot displays the 'CURRENT EMPLOYEE' interface. At the top, there is a navigation bar with 'CURRENT EMPLOYEE' on the left, 'Open Requests : 1' in the center, and a user welcome message 'Welcome Admin' with a 'Change Level' link on the right. Below the navigation bar are two icons: 'List Employees' and 'New Employee'. The main content area is a form for editing an employee record. The form includes the following fields and values:

| | | | | |
|-----------------|--------------------------------------------------------------------------|--------|------------|------------------------------------------------------------------------|
| Employee No. | EMSNJ-A019 | change | Site Code | Emerson Nanjing |
| Full Name | Jason Walls | | Department | FM - Sodexo Team |
| Category | <input checked="" type="radio"/> Employee <input type="radio"/> Customer | | Status | <input checked="" type="radio"/> Active <input type="radio"/> Inactive |
| Designation | Mechanical Technician | | | |
| Address | 1020 Palm Beach Drive, California, USA | | | |
| Office Location | San Diego, California | | | |
| Email | jasonwalls@ccsupport.com | | | |
| Work Phone | 019345789 | Ext. | | Fax |
| Mobile Phone | | | | House Phone |
| Hourly Salary | | | | Over Time 1 |
| Over Time 2 | | | | Over Time 3 |

There are 'update' buttons located at the top right and bottom right of the form area.

Figure 96: Current Employee Screen showing existing Employee record opened for Viewing or Editing

To open existing employee record for editing the steps are as follows:

1. On the **Employees opening screen**, set the **site** where the employee is located, using **current site selector**. This will refresh the employee list automatically.
2. Scroll through the employee listing, or use employee search to locate the employee you want to open for editing.
3. Click the **employee Number** to open it as shown in **Figure 96** above.
4. Edit the **employee** details as appropriate.
5. Click . This will output the message below if the update is successful.



6. Finish.

8. MATERIAL



Material

ACCESSING MATERIAL

*You can access **Material** on **CWorks EASY** opening screen by clicking the **icon** on the left, which will open the **Material Opening Screen**.*

The **Material** module provides precise **inventory control** essential to the operations of a successful and well-organized maintenance team. The inventory control also provides timely and accurate information on all goods receipts, the movement of parts (transfers) within or between sites, allocation of parts to maintenance work orders, removal or other disposition of goods, and the precise valuation and status of goods remaining in inventory at any point in time down to the sub-store and bin status. In another words, this module ensures that you have the tools to manage and control your inventory in the most cost-effective manner possible.

Notes on the Process of Assigning Parts to Sub-Stores and Bins

Before you begin assigning parts to sub-stores and bins, you must create these parts or components. The good news is they are under the Material menu and as shown below.



You can create new **sub-stores** using the Material menu above.



Similarly, you can create new **bins** using the Material menu above.

8.1 Material Opening Screen

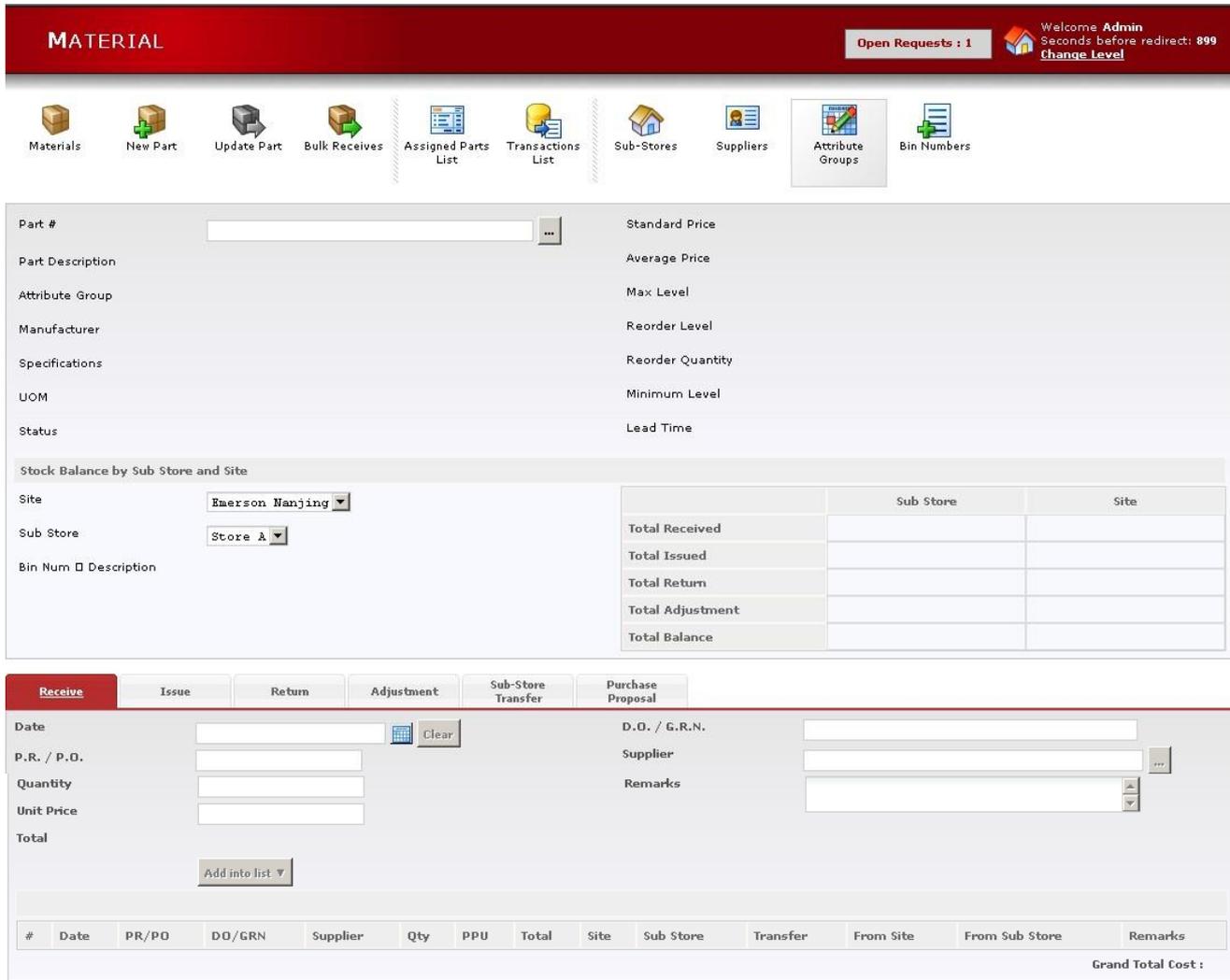


Figure 97: Material Opening Screen

Figure 97 shows the **Material opening screen**. The notable feature on this screen is the main menu shown below that offers ten selections of functions for material handling and processing.



The table below describes each function briefly.

MATERIAL OPENING SCREEN MENU

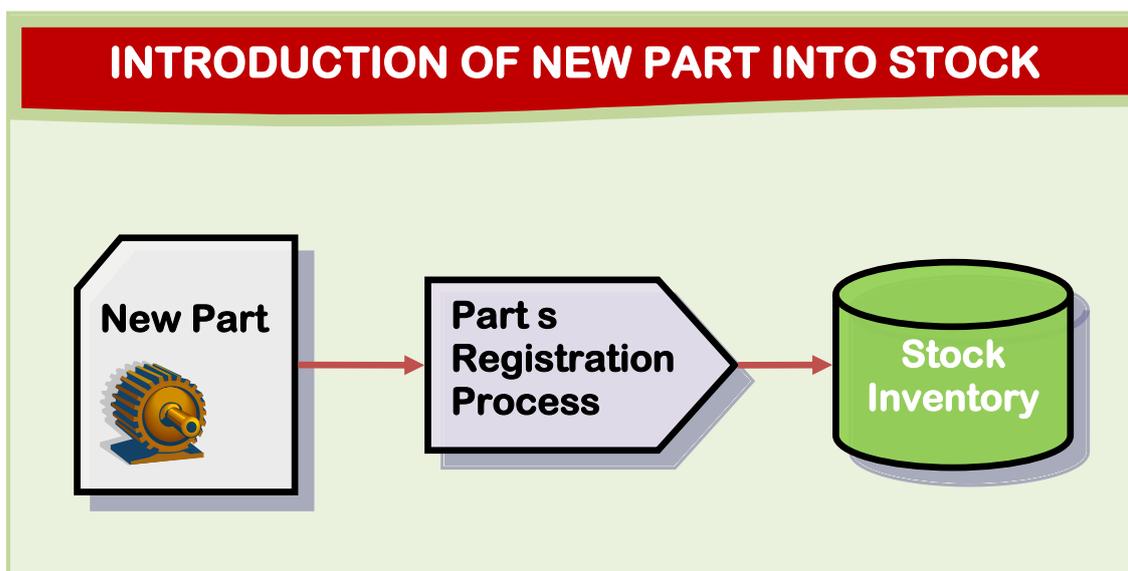
| | MENU ITEM | DESCRIPTION |
|----|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| 1 |  Materials | Go or return to Material Opening Screen |
| 2 |  New Part | Register new parts to add to your stock parts or items. You need to supply the detail of the following information |
| 3 |  Update Part | Update or modify the detail of an existing stock item. The detail for the following information can be updated accordingly |
| 4 |  Bulk Receives | Process Bulk delivery of parts from suppliers into stock |
| 5 |  Assigned Parts List | List all parts assigned to a site and/or a sub-store according to optional criteria. Search function is also provided |
| 6 |  Transactions List | List all stock transactions |
| 7 |  Sub-Stores | POP-UP FUNCTION Add new sub-store or edit an existing sub-store |
| 8 |  Suppliers | Add <i>new supplier</i> to <i>supplier list</i> or edit an existing supplier |
| 9 |  Attribute Groups | POP-UP FUNCTION Add new <i>attribute</i> or edit existing attribute |
| 10 |  Bin Numbers | POP-UP FUNCTION Add <i>new bin number</i> or edit existing bin |

8.2 How to Register New Parts into Stock Inventory



When maintenance store orders parts, the supplier normally delivers the parts to the store, which then put them through **Part (stock) Received Process**. During this process, store personnel records delivery details and part details (delivery date, quantity, PO, DO, Supplier, etc to a sub-store) into **Material database**. Only then, will the store begin issuing parts for carrying out maintenance activities.

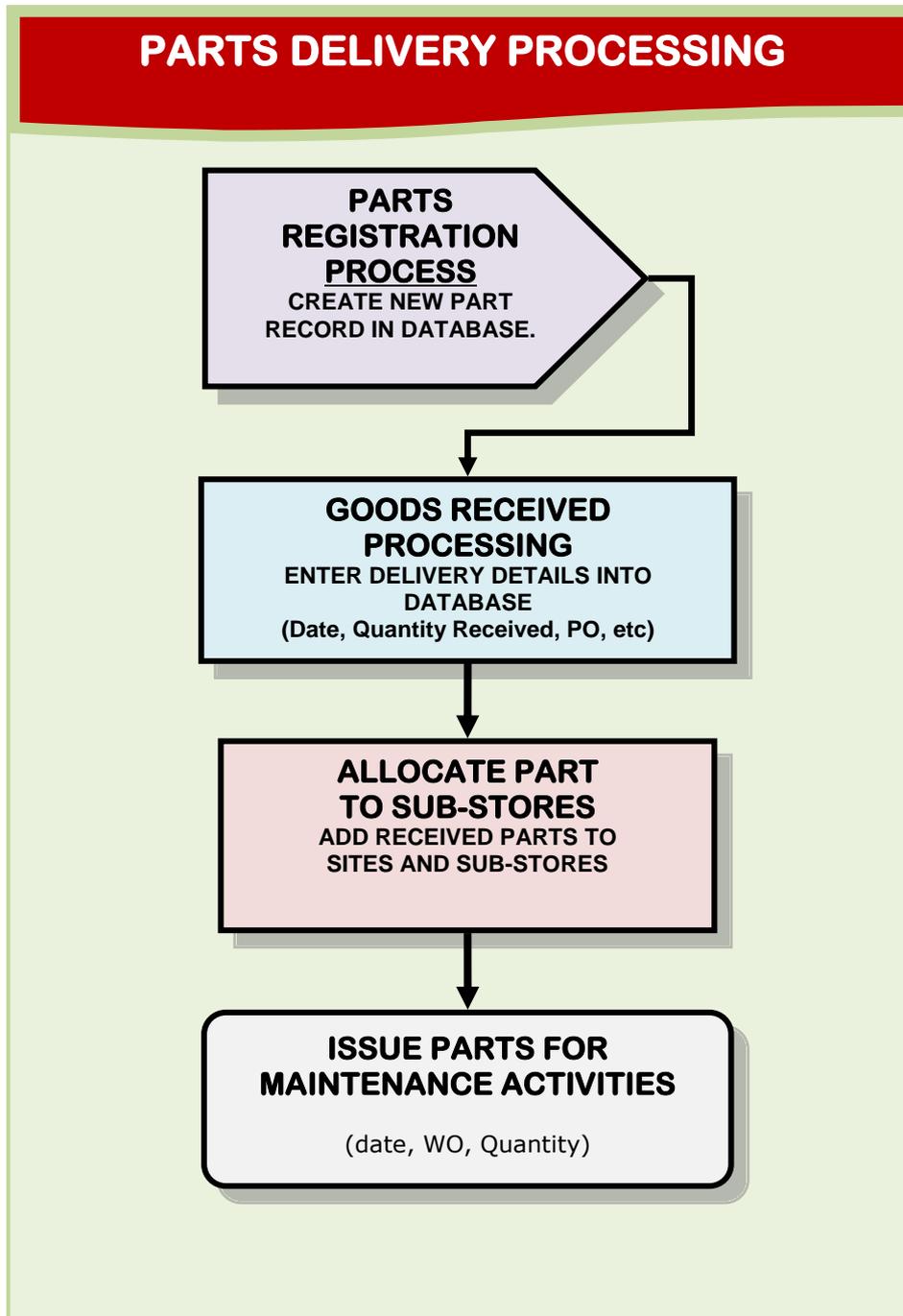
Sometimes, a company is compelled to introduce new parts to the stock for a reason. The reason could be good economic to replace expensive part with a cheaper part of same quality; upgrading to cut breakdowns; replacement for discontinued part, etc.



Introduction of new parts into stock require you put the part through **Parts Registration Process** where you create a new part record for it in the database and store its relevant details. The details include:

1. Assigning Part Number to the new part
2. Part Description
3. Part Specification
4. Part Manufacturer
5. Make notes on additional useful information on the part
6. Part Unit of Measurement or measure of quantity (e.g. Kg, Litre, Gallon, Metre, unit, can, pack, sheets, rolls)
7. Attribute Group assigned to the part
8. Allow/Disallow negative balance in part stock level
9. Show/Hide in the Purchase Proposal

The process flow below shows part processing including introduction of new spare part or item into material database.



Welcome Admin
Seconds before redirect:
[Change Level](#)

Materials New Part

General Information Assign to Sub-Store Suppliers

Part #

Part Description

Specifications

Manufacturer

Notes

Status

Measurement Unit

Attribute Group

Allow Negative Balance

Show Part In Purchase Proposal?

Save

Figure 98: New Part Registration– Recording Part General Details

Welcome Admin
Seconds before redirect:
[Change Level](#)

Materials New Part

General Information Assign to Sub-Store Suppliers

Site

Sub-Store

Location / Bin

Max. Level

Min. Level

Standard Price

Reorder Level

Reorder Quantity

Lead Time day(€)

Add into list ▼

Assigned Sub-Store(s)

| # | Site | Sub-Store | Bin No. | Std. Price | Max. Lvl. | Reodr. Lvl. | Reodr. Qty. | Min. Lvl. | Lead Time (days) | Options |
|---|------|-----------|---------|------------|-----------|-------------|-------------|-----------|------------------|---------|
| | | | | | | | | | | |

Save

Figure 99: New Part Registration– Parts Allocation to Sub-Stores on Different Sites



Figure 100: New Part Registration– Adding Suppliers to Part Suppliers List

Here are the steps to register new parts into stock:

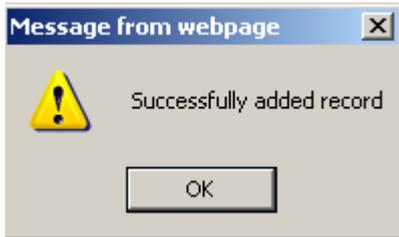
1. On **Material Opening Screen** shown in **Figure 97**, click



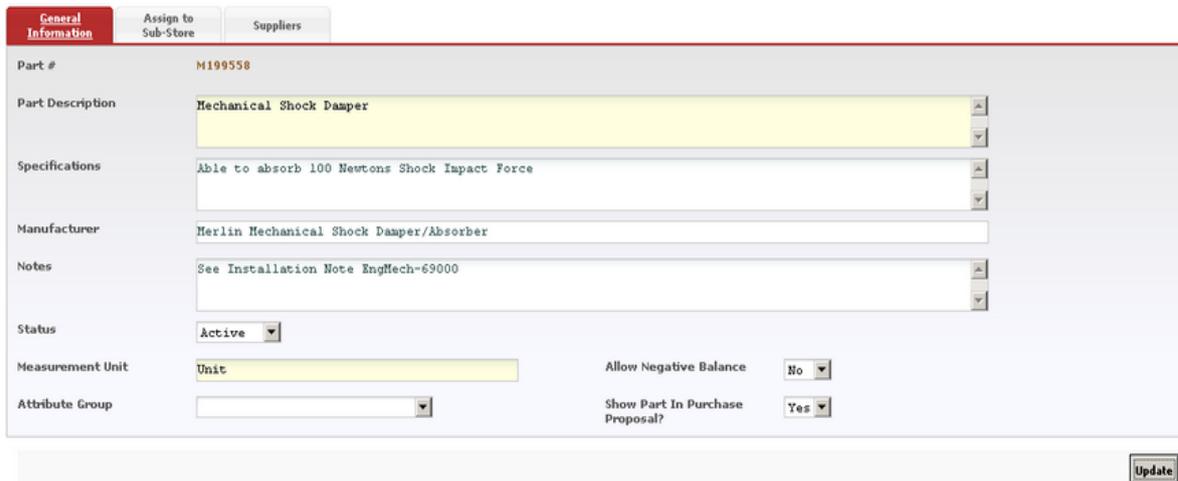
New Part icon at the top of the screen. This will open **Part Registration form of Figure 98** above with **General Information Tab** as the active tab.

2. Fill in all the fields as shown below.

At this point, if you want to, you can click **Save** to save the details entered so far. If the save is successful, you will see the message below.



In addition, the screen will change as shown below.



Notice how the **Save** button has been changed to **Update** button after you click save.

- Next, click '**Assign to Sub-store Tab**'.

Instantly, this will open the form shown in **Figure 99** above.

Now, you can set up **all sub-stores** that carry this spare part.

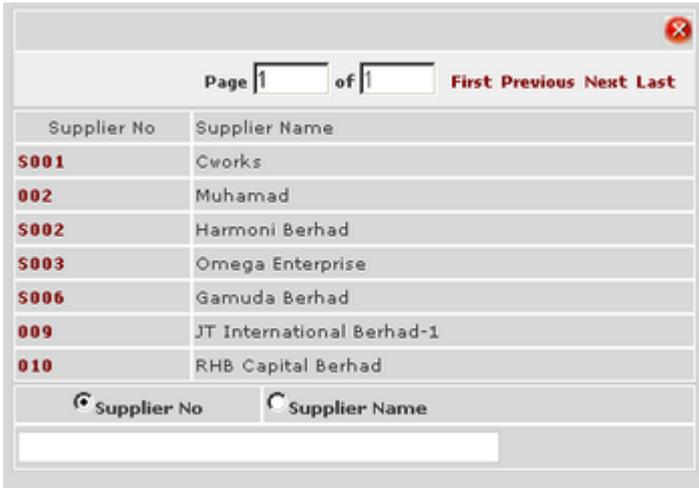
The steps of setting up a sub-store require that you set up the values of the following parameters shown in the table below.

| | PARAMETER | DESCRIPTION |
|----|------------------|---------------------------------------------------------------------|
| 1. | Max. Level | The Maximum permissible quantity it can carry |
| 2. | Min. Level | The lowest permissible quantity it can falls to |
| 3. | Standard Price | Standard price (per unit) |
| 4. | Location/Bin | Location/bin number designated for this part |
| 5. | Reorder Level | Level/Quantity when re-order is due |
| 6. | Reorder Quantity | Quantity to order |
| 7. | Lead Time | The time from placing an order to the delivery of the goods in days |

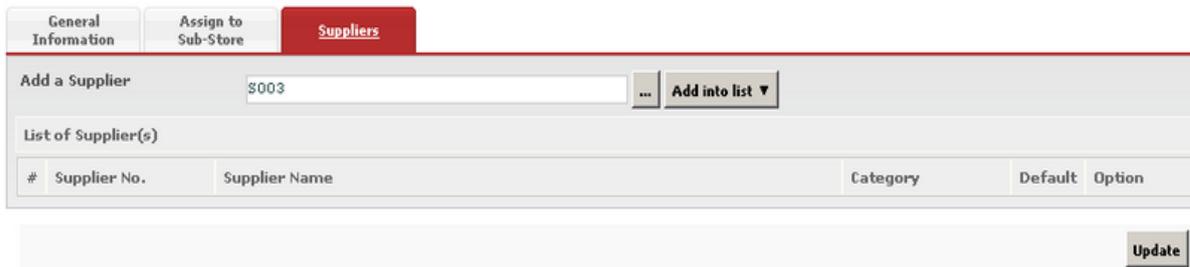
Here is the list of fields that you must set: Max. Level, Min. Level, Standard Price, Location/Bin, Reorder Level, Reorder Quantity and Lead Time.

After setting up those fields, you can save them by clicking **Add into list** . This will immediately add the information to **Assign Sub-Store(s)** listing as shown below.

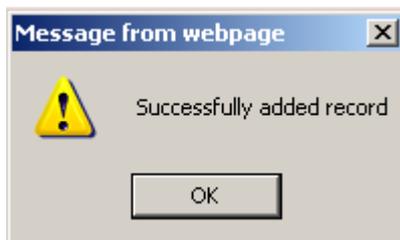
4. Repeat step (4) if you have more sub-stores to set up.
5. Next, click **Suppliers Tab** to open up the form as shown in **Figure 100**.
6. In order to select supplier to add to the suppliers list, click ellipsis button, , to open pop-up panel as shown below.



From the panel, you can click the appropriate **Supplier No.** to make selection. At the same time, the CMMS will copy the selection to the field shown below.



7. Next, click **Add into list ▼** to add the supplier to the listing.
8. If the save is successful, you will see the message below.



Click **ok** to close the message above.

At the same time, the CMMS will add supplier to the suppliers listing as shown below.

*Note: Notice the **delete button**. If necessary, you can **delete the supplier**.*

| General Information | | Assign to Sub-Store | | Suppliers | |
|---------------------------------------|--------------|------------------------------------|----------|----------------------------------------------|---------------------------------------|
| Add a Supplier | | <input type="text" value="\$003"/> | | <input type="button" value="Add into list"/> | |
| List of Supplier(s) | | | | | |
| # | Supplier No. | Supplier Name | Category | Default | Option |
| 1 | \$003 | Omega Enterprise | Both | <input type="radio"/> | <input type="button" value="Delete"/> |
| <input type="button" value="Update"/> | | | | | |

Note on Possible Error message:

You will get error message below if you have not entered the part number on the **General Information tab** and you click update to save the record.



9. Click the button to save all your changes.
10. Finish.

You have just completed the registration process of new inventory parts into the material stock. You are now ready to process the delivery of this part from suppliers.

8.3 How to Make Basic Selection of Parts from Inventory Parts Listing

This section outlines the procedure whereby you will select a part from the list of inventory parts specifically for carrying out some functions on the part. The selection procedure involves selecting the **part number** corresponding to the part that you want, from the inventory part listing.

This is a crucial step that you need remember because you will use this procedure repeatedly for most inventory tasks. Some of these tasks included:

1. Viewing part's **general information**, such as suppliers, sites and sub-stores
2. (**Auto-Reorder levels**) Setting up sub-store **maximum quantity** on-hand, **minimum order quantity**, and automatic **reorder level** based on the maximum quantity on-hand as the main criterion
3. **Receiving** part deliveries
4. **Issuing** parts to work orders
5. **Returning** surplus parts to sub-stores from work orders
6. Making **adjustment** to parts on-hand count for breakage, etc
7. Making **Sub-store-to-Sub-store parts transfers**
8. Making **Purchase proposals**

MATERIAL
Open Requests : 2
Welcome Admin
Seconds before redirect: 907
[Change Level](#)

Materials
New Part
Update Part
Bulk Receives
Assigned Parts List
Transactions List
Sub-Stores
Suppliers
Attribute Groups
Bin Numbers

| | |
|------------------|------------------|
| Part # | Standard Price |
| Part Description | Average Price |
| Attribute Group | Max Level |
| Manufacturer | Reorder Level |
| Specifications | Reorder Quantity |
| UOM | Minimum Level |
| Status | Lead Time |

Stock Balance by Sub Store and Site

Site: Emerson Nanjing

Sub Store: Store AE

Bin Num Description

| | Sub Store | Site |
|------------------|-----------|------|
| Total Received | | |
| Total Issued | | |
| Total Return | | |
| Total Adjustment | | |
| Total Balance | | |

Receive
Issue
Return
Adjustment
Sub-Store Transfer
Purchase Proposal

| | | | | |
|-------------|----------------------|--------------------------------------|---------------|----------------------|
| Date | <input type="text"/> | <input type="button" value="Clear"/> | D.O. / G.R.N. | <input type="text"/> |
| P.R. / P.O. | <input type="text"/> | | Supplier | <input type="text"/> |
| Quantity | <input type="text"/> | | Remarks | <input type="text"/> |
| Unit Price | <input type="text"/> | | | |
| Total | | | | |

| # | Date | PR/PO | DO/GRN | Supplier | Qty | PPU | Total | Site | Sub Store | Transfer | From Site | From Sub Store | Remarks |
|---|------|-------|--------|----------|-----|-----|-------|------|-----------|----------|-----------|----------------|--------------------|
| | | | | | | | | | | | | | Grand Total Cost : |

Figure 101: Material Parts Processing Form

Here are the steps for selecting a part from the inventory part listing and load its details into the **Part Processing Form**:

1. At the bottom of the **Material Opening Screen** in **Figure 101** above, is the **Part Processing Form**.

2. Display the part listing by clicking the ellipsis  button found on the right of the 'Part #' field as shown below.



Consequently, this will display the part listing panel as shown below, from which a part can be selected for editing.

A screenshot of a part listing panel. At the top, it shows 'Page 1 of 2' and navigation buttons: 'First', 'Previous', 'Next', and 'Last'. Below this is a table with three columns: 'Part No', 'Description', and 'Status'. The table contains the following data:

| Part No | Description | Status |
|----------------|-------------------------|--------|
| M199558 | Mechanical Shock Damper | Active |
| P001 | Hardened Steel Bearings | Active |
| P002 | Part 002 | Active |
| P003 | Oil Seal | Active |
| P004 | Gasket | Active |
| P007 | Jus Apple | Active |
| P090 | Bearing | Active |
| P092 | Wan | Active |
| P111 | Part111 | Active |
| P222 | Part222 | Active |

Below the table, there are two radio buttons: 'Part No' (selected) and 'Description'. At the bottom, there is a search input field.

3. Select a **part** by clicking on its **part number**. This will load the part details into the **Part Processing Form** as shown below.

The screenshot displays the 'MATERIAL' section of the software. At the top, there is a navigation bar with icons for Materials, New Part, Update Part, Bulk Receives, Assigned Parts List, Transactions List, Sub-Stores, Suppliers, Attribute Groups, and Bin Numbers. The main area shows the details for Part # M199558, which is a Mechanical Shock Damper. The details include Standard Price (20.0000), Average Price (20.00), Max Level (50.00), Reorder Level (25.00), Reorder Quantity (25.00), Minimum Level (15.00), and Lead Time (3). Below this is a 'Stock Balance by Sub Store and Site' table for Emerson Nanjing, showing zero values for Total Received, Total Issued, Total Return, Total Adjustment, and Total Balance. At the bottom, there is a form for recording transactions, with tabs for Receive, Issue, Return, Adjustment, Sub-Store Transfer, and Purchase Proposal. The 'Receive' tab is active, showing fields for Date, P.R. / P.O., Quantity, Unit Price, Total, D.O. / G.R.N., Supplier, and Remarks.

| Site | Sub Store | Bin Num | Description | Total Received | Total Issued | Total Return | Total Adjustment | Total Balance |
|-----------------|-----------|---------|-------------|----------------|--------------|--------------|------------------|---------------|
| Emerson Nanjing | Store AE | B1 | Bin 1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

4. Finish. This completes the description.

8.4 How to View and Modify Inventory Parts Details and Sub-Stores

This section outlines the procedure to select an inventory part and open it either for viewing or for changing its details. Viewing the part details is straight forward. However, when it comes to amending its details, there are two separate sections that need to be considered. Both sections are covered in here.

Here are the steps for **viewing** and **modifying part details**:

1. From the description in **section 8.3** above, select and open a **part number** in the editing form. This will result in the form as shown below.

MATERIAL Open Requests : 2 Welcome Admin
Seconds before redirect: 894
[Change Level](#)

Materials Assigned Parts List Transactions List Sub-Stores Suppliers Attribute Groups Bin Numbers

Part # Standard Price 20.0000
 Part Description Mechanical Shock Damper Average Price 20.0000
 Attribute Group Max Level 50.00
 Manufacturer Merlin Mechanical Shock Damper/Absorber Reorder Level 25.00
 Specifications Able to absorb 100 Newtons Shock Impact Force Reorder Quantity 25.00
 UOM Unit Minimum Level 15.00
 Status Active Lead Time 5

Stock Balance by Sub Store and Site

Site Emerson Nanjing
 Sub Store Store AE
 Bin Num Description B1 - Bin 1

| | Sub Store | Site |
|------------------|-----------|-------|
| Total Received | 30.00 | 30.00 |
| Total Issued | 0.00 | 0.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 0.00 | 0.00 |
| Total Balance | 30.00 | 30.00 |

Receive Issue Return Adjustment Sub-Store Transfer Purchase Proposal

Date D.O. / G.R.N.
 P.R. / P.O. Supplier

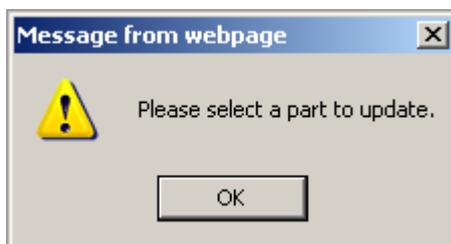


2. Click the icon located on the line of icons as shown below (under the **"Material"** banner).



Note on error message:

*If you do not select the **part number** first, prior to clicking the above icon, the CMMS you will output the **error message** shown below because the **part number is compulsory**.*



- This will load the part's details into the form below with **General Information Tab** active.

The screenshot shows the 'General Information' tab for a part. The fields are as follows:

- Part #: M199558
- Part Description: Mechanical Shock Damper
- Specifications: Able to absorb 100 Newtons Shock Impact Force
- Manufacturer: Merlin Mechanical Shock Damper/Absorber
- Notes: See Installation Note EngMech-69000
- Status: Active
- Measurement Unit: Unit
- Attribute Group: (empty)
- Allow Negative Balance: No
- Show Part In Purchase Proposal: Yes

An 'Update' button is located at the bottom right of the form.

Edit the fields on this tab as appropriate.

- Next, go to **Assign to Sub-Store Tab** as shown below by clicking on its tab. This tab allows you to set up new sub-stores or edit the existing ones.

The screenshot shows the 'Assign to Sub-Store' tab. The form fields are:

- Site: Emerson Nanjing
- Sub-Store: Store AE
- Max. Level: (empty)
- Min. Level: (empty)
- Standard Price: (empty)
- Location / Bin: (empty)
- Reorder Level: (empty)
- Reorder Quantity: (empty)
- Lead Time: (empty) day(s)

There is an 'Add into list' button below the form. Below the form is a table of assigned sub-stores:

| # | Site | Sub-Store | Bin No. | Std. Price | Max. Lvl. | Reorder Lvl. | Reorder Qty. | Min. Lvl. | Lead Time (days) | Options |
|---|-----------------|-----------|------------|------------|-----------|--------------|--------------|-----------|------------------|---------|
| 1 | Emerson Nanjing | Store AE | B1 - Bin 1 | 20.0000 | 50.00 | 25.00 | 25.00 | 15.00 | 3 | Edit |

An 'Update' button is located at the bottom right of the form.

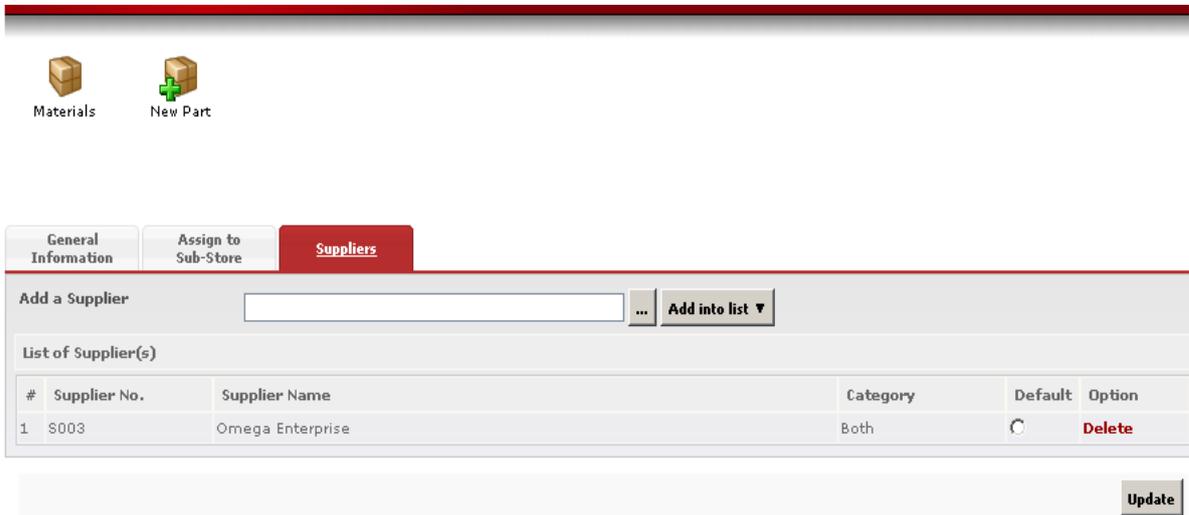
First, select the site where your sub-store is located. If the one or more sub-stores exist,

you should see the sub-store listing at the bottom of the form as shown above.

In order to edit any of the sub-stores, you need to click the **Edit** link corresponding to that sub-store.

Alternatively, you can also set up new sub-store and add it to the list by using **Add into list** button.

- Next, click **Suppliers Tab** to make it active as shown below.



This tab features three options. These options include delete existing supplier, add supplier to the list of suppliers and set **Purchase Proposal Default Supplier Flag** (shown below).



- If you want to **delete** an existing **supplier**, click the **Delete** link (at the extreme right end) corresponding to the supplier.
Otherwise, skip to the next step.

- If you are not going to add a new supplier, skip to the next step.

If you want to **add a new supplier**, click the ellipsis  button, which will pop-up the panel of suppliers as shown below.

| Supplier No | Supplier Name |
|-------------|------------------------------|
| S001 | Cworks |
| 002 | Muhamad Canvas Supplier |
| S002 | Harmoni Berhad |
| S003 | Omega Enterprise |
| S006 | Gamuda Berhad |
| 009 | JT International Berhad-1000 |
| 010 | RHB Capital Berhad |

Select a supplier by clicking on the supplier’s number. Consequently, this will copy the supplier’s number to the Add supplier field as shown below.

| # | Supplier No. | Supplier Name |
|---|--------------|------------------------------|
| 1 | 009 | JT International Berhad-1000 |
| 2 | S003 | Omega Enterprise |

Finally, click **Add into list ▼** to complete the procedure.

- If you are not going to set **Purchase Proposal Default Supplier Flag**, skip to the next step.

| Category | Default | Option |
|----------|----------------------------------|--------|
| Both | <input type="radio"/> | Delete |
| Both | <input checked="" type="radio"/> | Delete |

Otherwise, you can set the above **flag**, by clicking on the appropriate **radio button** corresponding to the supplier you want to nominate as the **default supplier**.

Consequently, this will automatically display the **default supplier’s name** when you select **Purchase Proposal Tab** on the **Material Opening Screen** as shown below.

| Receive | Issue | Return | Adjustment | Sub-Store Transfer | Purchase Proposal |
|-------------|----------------------|--------|------------|--------------------|-------------------|
| Date | <input type="text"/> | | | | |
| P.R. / P.O. | <input type="text"/> | | | | |
| Quantity | <input type="text"/> | | | | |
| Unit Price | <input type="text"/> | | | | |
| Total | <input type="text"/> | | | | |

9. Finally, click  to save all the changes.

*Note: You do not have to wait until you make all the changes to click **update**. In fact, any time you make a change, it is good practice to save it as soon as possible. Besides being good practice, it is better to be safe than sorry.*

10. Finish.

8.4.1 How to Edit and Update Existing Sub-Store Settings

Here are the steps to **modify** and **update sub-store settings**:

1. As described in **section 8.3** above, first select the part you want to modify.

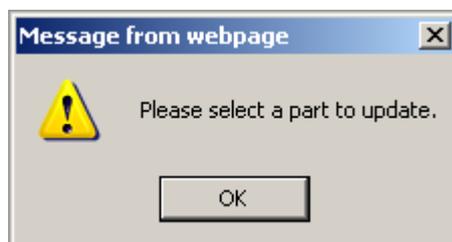


2. Click on the icon . (You can find this icon on the line of icons as shown below - just under the **"Material"** title bar).

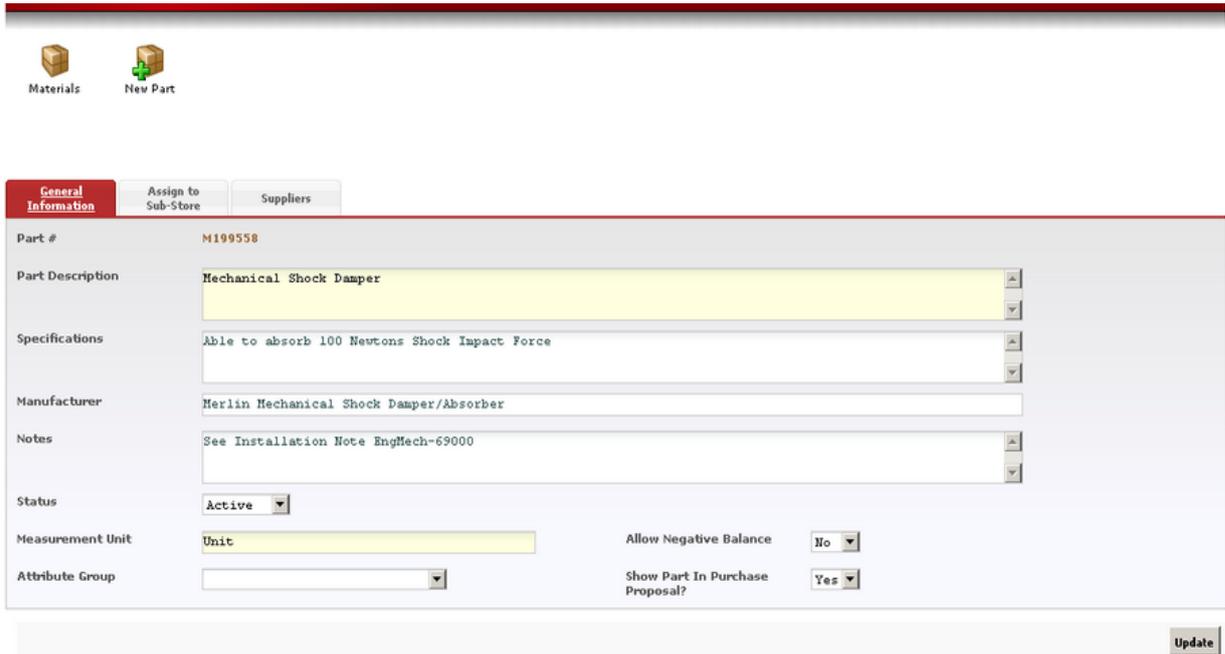


Note on error message:

*If you forget to select the **part number** prior to clicking the above icon then you will receive the error message shown below. It tells you that you the part number is compulsory.*



- This will load the part's details into the form below with **General Information Tab** active.



The screenshot displays the software interface for a part's details. At the top, there are two icons: 'Materials' (a box) and 'New Part' (a box with a plus sign). Below these is a tabbed interface with three tabs: 'General Information' (selected), 'Assign to Sub-Store', and 'Suppliers'. The 'General Information' tab contains the following fields:

- Part #**: M199558
- Part Description**: Mechanical Shock Damper
- Specifications**: Able to absorb 100 Newtons Shock Impact Force
- Manufacturer**: Merlin Mechanical Shock Damper/Absorber
- Notes**: See Installation Note EngMech-69000
- Status**: Active
- Measurement Unit**: Unit
- Attribute Group**: (empty dropdown)
- Allow Negative Balance**: No
- Show Part In Purchase Proposal?**: Yes

An 'Update' button is located at the bottom right of the form.

Edit the fields on this tab as appropriate.

- Next, go to **Assign to Sub-Store Tab** as shown below by clicking on its tab. This tab allows you to set up new sub-stores or edit the existing ones. However, here we are interested in how to edit an existing sub-store settings.

In order to edit an existing sub-store settings, you need to click the **Edit** link corresponding to the sub-store as shown circled above.

- After you clicked the **Edit** link the form will change to the one shown below.

Now you can edit all the settings shown above as appropriate.

- Click **Update** to save any changes you have made or click **Cancel** if you want to abort the changes. Clicking **Update** will cause the CMMS to display the message below. This indicates that the CMMS has saved the changes to the record.



Click ok to close the message.

7. Finish.

8.5 How to Process Individual Goods/Parts Delivery

This section outlines the procedure to receive and process individual goods delivery from suppliers.

Here are the steps to view or **update** your parts **stock level**:

1. Go to **Material Opening Screen** shown in **Figure 97**, and you will instantly see the **part edit form** as shown in **Figure 101**.
2. Next, you should click the ellipsis  on the end of **Part # input field** as shown below.



This will instantly pop up the part list panel as shown below.

| Part No | Description | Status |
|----------------|-------------------------|--------|
| M199558 | Mechanical Shock Damper | Active |
| P001 | Hardened Steel Bearings | Active |
| P002 | Part 002 | Active |
| P003 | Oil Seal | Active |
| P004 | Gasket | Active |
| P007 | Jus Apple | Active |
| P6677 | Part 6677 | Active |
| P777 | Part 777 | Active |
| P7899 | Part P7899 | Active |

Page 1 of 1 First Previous Next Last

Part No
 Description

Now, select a part by clicking on the part number.

This will instantly load the part details into the **Material Part Handling and Processing Form** as shown below.

MATERIAL
Open Requests : 2
Welcome Admin
Seconds before redirect: 910
[Change Level](#)

Materials

New Part

Update Part

Bulk Receives

Assigned Parts List

Transactions List

Sub-Stores

Suppliers

Attribute Groups

Bin Numbers

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | M199558 | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 20.00 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 3 |

Stock Balance by Sub Store and Site

| | | | |
|-----------|-----------------|------------------|------|
| Site | Emerson Nanjing | | |
| Sub Store | Store AE | | |
| Bin Num | B1 - Bin 1 | | |
| | | Sub Store | Site |
| | | Total Received | 0.00 |
| | | Total Issued | 0.00 |
| | | Total Return | 0.00 |
| | | Total Adjustment | 0.00 |
| | | Total Balance | 0.00 |

| | | | | | |
|----------------------------------------------|----------------------|--------------------------------------|------------|--------------------|----------------------|
| Receive | Issue | Return | Adjustment | Sub-Store Transfer | Purchase Proposal |
| Date | <input type="text"/> | <input type="button" value="Clear"/> | | D.O. / G.R.N. | <input type="text"/> |
| P.R. / P.O. | <input type="text"/> | | | Supplier | <input type="text"/> |
| Quantity | <input type="text"/> | | | Remarks | <input type="text"/> |
| Unit Price | <input type="text"/> | | | | |
| Total | <input type="text"/> | | | | |
| <input type="button" value="Add into list"/> | | | | | |

- Next, click the **Receive Tab** so that it becomes the active tab as shown above.
- Select the calendar icon, , to set the entry date for the part received in the field below.

Date  **Clear**

Then add all the other delivery details until you have something similar to that shown below.

| Receive | Issue | Return | Adjustment | Sub-Store Transfer | Purchase Proposal |
|------------------------|------------------|-----------------------------------------------------------------------------------|--------------|--------------------|-----------------------------------------------------------------------|
| Date | 16 December 2010 |  | Clear | D.O. / G.R.N. | DO-1125 |
| P.R. / P.O. | PO-90 | | | Supplier | S002 |
| Quantity | 30 | | | Remarks | This supplier is not yet on the suppliers listing. Very good service. |
| Unit Price | 20.00 | | | | |
| Total | 600.00 | | | | |
| Add into list ▼ | | | | | |

- Next, Click **Add into list ▼** to add the delivery into the listing as shown below.

| # | Date | PR/PO | DO/GRN | Supplier | Qty | PPU | Total | Site | Sub Store | Transfer | From Site | From Sub Store | Remarks |
|----------------------------------|------------------|-------|---------|----------------|-------|---------|--------|-----------------|-----------|----------|-----------|----------------|-----------------------------------------------------------------------|
| 1 | 16 December 2010 | PO-90 | DO-1125 | Harmoni Berhad | 30.00 | 20.0000 | 600.00 | Emerson Nanjing | Store AE | 0 | | | This supplier is not yet on the suppliers listing. Very good service. |
| Grand Total Cost : 600.00 | | | | | | | | | | | | | |

- Finally, this is how the whole form looked like.

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | M199558 | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 20.00 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 3 |

| Stock Balance by Sub Store and Site | | | |
|-------------------------------------|-----------|------------------|-------|
| Site | Sub Store | Sub Store | Site |
| Emerson Nanjing | Store AE | Total Received | 30.00 |
| | | Total Issued | 0.00 |
| | | Total Return | 0.00 |
| | | Total Adjustment | 0.00 |
| | | Total Balance | 30.00 |

| Receive | Issue | Return | Adjustment | Sub-Store Transfer | Purchase Proposal |
|------------------------|----------------------|-------------------------------------------------------------------------------------|--------------|--------------------|----------------------|
| Date | <input type="text"/> |  | Clear | D.O. / G.R.N. | <input type="text"/> |
| P.R. / P.O. | <input type="text"/> | | | Supplier | <input type="text"/> |
| Quantity | <input type="text"/> | | | Remarks | <input type="text"/> |
| Unit Price | <input type="text"/> | | | | |
| Total | | | | | |
| Add into list ▼ | | | | | |

| # | Date | PR/PO | DO/GRN | Supplier | Qty | PPU | Total | Site | Sub Store | Transfer | From Site | From Sub Store | Remarks |
|----------------------------------|------------------|-------|---------|----------------|-------|---------|--------|-----------------|-----------|----------|-----------|----------------|-----------------------------------------------------------------------|
| 1 | 16 December 2010 | PO-90 | DO-1125 | Harmoni Berhad | 30.00 | 20.0000 | 600.00 | Emerson Nanjing | Store AE | 0 | | | This supplier is not yet on the suppliers listing. Very good service. |
| Grand Total Cost : 600.00 | | | | | | | | | | | | | |

7. Click  to save all the changes.
8. Finish.

8.6 How to Do Bulk Receive Processing of Goods/Parts



This section outlines the CMMS function for **Bulk Receives processing** of goods/parts from suppliers. You can access this function by clicking the icon above.

Sometimes, the material store may receive many deliveries together. In order to process these deliveries in one go, you can use the **Bulk Receives Processing**. When you access this function, the first thing you will see is the **Bulk Receives processing form** of **Figure 102** below.

The **Bulk Receives Processing** allows you to process multiple deliveries in a single run. For each delivery, you record the details such as the part number, received date, P.O. Number, Quantity, Price per unit, the destination site and sub-store, and finally the supplier. After this recording, you add it to the processed delivery list as shown below by clicking .



Preview of Bulk Receives

| # | Vendor | Part No. | Date | P.O. No. | Qty | PPU | Total | Site | Sub-Store | Options |
|---|--------|----------|------------------|----------|-----|-------|--------|------|-----------|---------------------------------------------------------------------------------------|
| 1 | S003 | P001 | 20 December 2010 | PO155 | 10 | 12.50 | 125.00 | EMSJ | ST1 |  |

Note: Added entries are not saved until you click the "Save" button.



Repeat the above process until you finished all the deliveries, at which point, you should save the list by clicking .

Note for single-delivery processing

For **single-delivery processing**, the CMMS provides a quick **method** for doing this, and you can find it under the **Receive Tab** on the **Material opening screen**. Click on the **Receive Tab** to gain access to this method.

Welcome **Admin**
Seconds before redirect:
[Change Level](#)

Materials New Part

Bulk Receive

Destination Site: Cworks Malaysia Sub-Store: Store A

Part No. Supplier

Received Date Clear

P.O. No. Standard Price

Quantity Average Price

Price per Unit

Total

Add into list ▼

Preview of Bulk Receives

| # | Vendor | Part No. | Date | P.O. No. | Qty | PPU | Total | Site | Sub-Store | Options |
|---|--------|----------|------|----------|-----|-----|-------|------|-----------|---------|
|---|--------|----------|------|----------|-----|-----|-------|------|-----------|---------|

Note: Added entries are not saved until you click the "Save" button.

Save

Figure 102: Bulk Receives Processing Screen

Here are the steps for **Bulk Receive Processing** of parts:

1. On **Material Opening screen**, click  Bulk Receives icon. This will instantly display the **Bulk Receive Processing Screen** of **Figure 102** above.

2. Select **Destination Site** using the drop-down list shown here.

The screenshot shows a form titled "Bulk Receive". The "Destination Site" field has a dropdown menu open, displaying three options: "Cworks Malaysia", "Japan", and "Emerson Nanjing". The "Part No." field is visible below it but is empty.

3. In order to select the **Part No.** of the part to process, click on

The screenshot shows the "Part No." field in the form. To the right of the text input field is a small grey button with three dots (an ellipsis). This button is circled in red in the image.

the ellipsis button, , (circled above adjacent to the Part No. field) to pop-up the part listing as shown below.

The screenshot shows a dialog box for selecting a part. At the top, it says "Page 1 of 2" and has navigation buttons: "First", "Previous", "Next", and "Last". Below this is a table with two columns: "Part No" and "Description".

| Part No | Description |
|---------|-------------------------|
| M199558 | Mechanical Shock Damper |
| P001 | Hardened Steel Bearings |
| P002 | Part 002 |
| P003 | Oil Seal |
| P004 | Gasket |
| P007 | Jus Apple |
| P090 | Bearing |
| P092 | Wan |
| P111 | Part111 |
| P222 | Part222 |

At the bottom of the dialog, there are two radio buttons: "Part No" (which is selected) and "Description". Below the radio buttons is a text input field.

Finally, click on the part number to select it, and copy it into the **Part# field**.

4. Set the **Received date** via the calendar icon,  accordingly.
5. Fill in the **Quantity** and **Price** fields, as these fields are **mandatory**.
6. Select the destination sub-store.
7. Select the part supplier.

8. Click  button to add to the **Preview of Bulk Receives list**. The result will immediately appear in the **list** as shown below.

| Preview of Bulk Receives | | | | | | | | | | |
|--------------------------|--------|----------|----------------|----------|-----|-------|--------|-------|-----------|---------|
| # | Vendor | Part No. | Date | P.O. No. | Qty | PPU | Total | Site | Sub-Store | Options |
| 1 | S006 | M199558 | 3 January 2011 | 567002 | 10 | 20.00 | 200.00 | EMSNJ | ST2 | Delete |

Note: Added entries are not saved until you click the "Save" button.



9. Repeat step (3) to (7) to add the remaining deliveries to the **list**.
10. Finally, click the  button in order to process the list and save it in the CMMS.

THIS STEP IS EXTREMELY IMPORTANT

At this point, the CMMS has not save the list yet. You must click the  button in order to save the list. Otherwise, the list will be lost.

11. As a check that the process is successful, you can verify the result by going to the **Material opening screen**, and run a simple verification test as follows:

Select the **Part #** of the part you have added. Also, select which site and sub-store that it is assigned to.

Note:

Selecting the site alone will only show the total quantity for the whole site – that is the total for all sub-stores. In addition, the sub-store you select should have been set up previously. Otherwise, you would not see any detail in the sub-store.

After those selections, the part details should come up as shown below, with appropriate adjustment to particular quantity and prices. If the figures do not tally, you should investigate what went wrong, and why.

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | M199558 | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 20.0000 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 5 |

| Stock Balance by Sub Store and Site | | |
|-------------------------------------|-----------|-------|
| | Sub Store | Site |
| Total Received | 30.00 | 30.00 |
| Total Issued | 0.00 | 0.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 0.00 | 0.00 |
| Total Balance | 30.00 | 30.00 |

12. That completes the process.

8.7 How to View Assigned Parts List



Assign Parts List allows you to display a general view of **part-bin assignments** by **site** and with the site by **sub-store**. This utility can be useful for finding replacement parts in emergency.

In addition to the general display, the CMMS also provides a search facility that allows you to search for a particular part based on your input criteria. The CMMS will display the search results, if any, in the list above the search panel.

Welcome Admin
Seconds before redirect:
[Change Level](#)

Materials New Part Bulk Receives **Assigned Parts List** Transactions List Sub-Stores Suppliers Attribute Groups Bin Numbers

Site: **Emerson Nanjing** Sub Store: **Store AE**

Page 1 of 2 [First](#) [Previous](#) [Next](#) [Last](#)

| # | Part Number | Part Description | Site | Sub Store | Bin Number | Balance |
|----|-------------|-------------------------|-----------------|-----------|------------|---------|
| 1 | M199558 | Mechanical Shock Damper | Emerson Nanjing | Store AE | Bin 1 | 32.00 |
| 2 | P001 | Hardened Steel Bearings | Emerson Nanjing | Store AE | Bin 1 | 0.00 |
| 3 | P002 | Part 002 | Emerson Nanjing | Store AE | Bin 1 | 7.00 |
| 4 | P003 | Oil Seal | Emerson Nanjing | Store AE | | 9.00 |
| 5 | P004 | Gasket | Emerson Nanjing | Store AE | | 8.00 |
| 6 | P007 | Jus Apple | Emerson Nanjing | Store AE | Bin 1 | 23.00 |
| 7 | P092 | Wan | Emerson Nanjing | Store AE | Bin 1 | 20.00 |
| 8 | P111 | Part111 | Emerson Nanjing | Store AE | Bin 1 | 21.00 |
| 9 | P222 | Part222 | Emerson Nanjing | Store AE | Bin 1 | 20.00 |
| 10 | P333 | Part333 | Emerson Nanjing | Store AE | Bin 1 | 14.00 |

Record(s) : 16 Page 1 of 2 [First](#) [Previous](#) [Next](#) [Last](#)

Search for: in Bin No:

Show:

Sort By:

[Reset](#) [Search](#) [Reset](#) [Search](#)

Figure 103: General Viewing of Assigned Parts Listing

Here are the steps to **view assigned parts** listing:

1. Click **Assign Parts List icon** shown above to go to the screen of this facility. By default it will display the assigned parts for whatever site and sub-store you have currently set.
2. To view the listing for another site, you should change the **site setting** and/or the **sub-store setting** accordingly using the respective drop-down lists shown below.

Site: Sub Store:

3. Finish.

Alternatively, you can use the search facility by providing the appropriate criteria as shown by the search panel shown below. The table below describes each of the field on the search panel.

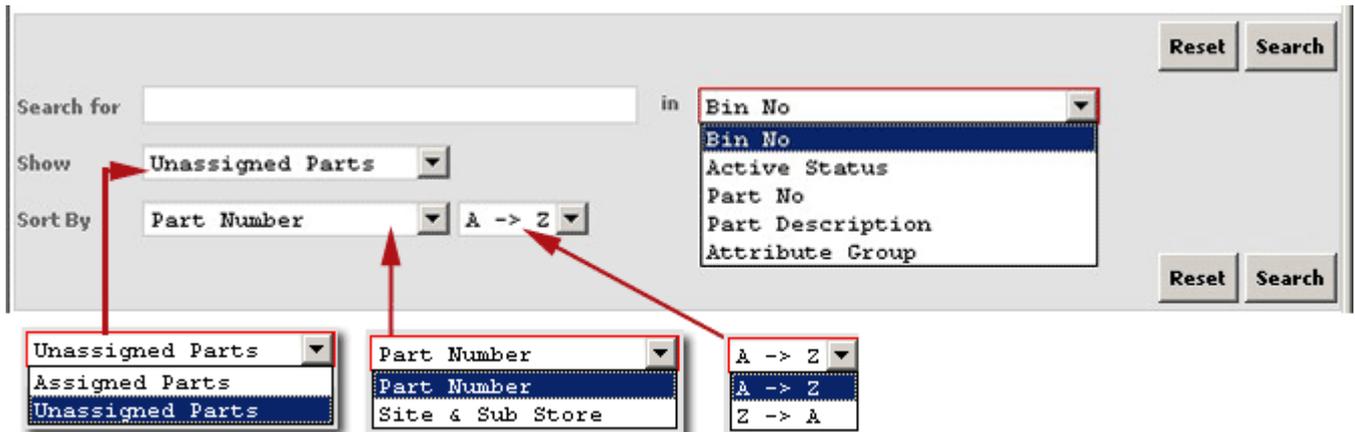


Figure 104: Search Facility with Various Options for Displaying Assigned or Unassigned Parts

| NO. | FIELD NAME | PARAMETER TYPE & DESCRIPTION |
|-----|-------------------|-----------------------------------------------------------------------------------------|
| 1. | Search For | (INPUT) full or partial string to search |
| 2. | in | (INPUT) Which field do you want to search |
| 3. | Show | (INPUT) Specify the search output as the listing of Assigned or Unassigned parts |
| 4. | Sort By | (INPUT) Sort the listing in ascending (A->Z) or descending order (Z->A) |
| 5. | Reset | (Button) Reset to default search mode |
| 6. | Search | (Button) Run Search |
| | | |

8.8 How to view List of Transactions



This facility allows you to display a general listing of **all transactions** by default. In addition to this, a **search facility** provides a way for you to target specific transactions for listing, whereby you can set one or more parameters matching the attributes of the target. The CMMS will display the result, above the **search panel**. Its comprehensive choice of parameters you can specify as criteria will allow you to target specific transaction easily.

MATERIAL - TRANSACTIONS LIST
Welcome Admin
Seconds before redirect:
[Change Level](#)

Materials New Part Bulk Receives Assigned Parts List Transactions List Sub-Stores Suppliers Attribute Groups Bin Numbers

Site: Emerson Nanjing

| # | Part # | Part Description | Trans. Type | Trans. Date | Qty. | Total Cost | Asset # | Asset Description |
|----|--------|------------------|-------------|-----------------|------|------------|---------------|-------------------|
| 1 | P090 | Bearing | Receive | 1 December 2010 | 5.00 | 17.50 | | |
| 2 | P090 | Bearing | Issue | 1 December 2010 | 2.00 | 0.00 | EMSNJ-N000156 | 00000 (000) |
| 3 | P003 | Oil Seal | Receive | 1 December 2010 | 5.00 | 30.00 | | |
| 4 | P003 | Oil Seal | Receive | 1 December 2010 | 4.00 | 20.00 | | |
| 5 | P7899 | Part P7899 | Issue | 1 December 2010 | 2.00 | 5.20 | EMSNJ-N000082 | 00000 |
| 6 | P090 | Bearing | Issue | 1 December 2010 | 2.00 | 10.53 | | |
| 7 | P092 | Wan | Receive | 1 December 2010 | 5.00 | 17.50 | | |
| 8 | P004 | Gasket | Issue | 1 December 2010 | 2.00 | 9.40 | | |
| 9 | P003 | Oil Seal | Issue | 1 December 2010 | 4.00 | 18.80 | EMSNJ-N000091 | G109 |
| 10 | P004 | Gasket | Receive | 1 December 2010 | 4.00 | 20.00 | | |

111 record

| | |
|----------------|---------|
| Total Quantity | 708.00 |
| Total Cost | 6099.21 |

Search Criteria Export to Excel Reset Search

| | |
|---------------------------------------------------------------------------------|--------------------------------------------------------------|
| Part No. <input type="text"/> | Manufacturer <input type="text"/> |
| Transaction Date From <input type="text"/> <input type="button" value="Clear"/> | To <input type="text"/> <input type="button" value="Clear"/> |
| Asset No. <input type="text"/> | Asset Description <input type="text"/> |
| Work Order # <input type="text"/> | Work type <input type="text"/> |
| Transaction Type All | Sort By Date Ascending |

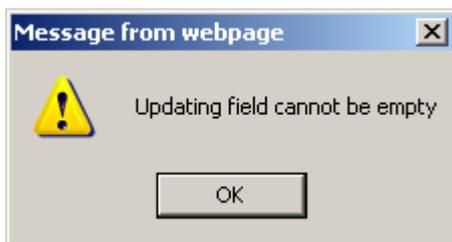
Export to Excel Reset Search

8.9 How to View General sub-store listing, Add and Edit Sub-Stores



The CMMS Material section also provides the facility to **manage sub-stores**. You can access this facility by clicking on the icon shown above and it will pop up the Sub-store dialog panel shown in **Figure 105** below. As a recommendation, always check that you have the correct site – before you begin working.

This facility enables you to view the general listing of sub-stores on a particular site, add new sub-stores and edit sub-stores. However, it strictly prohibits you from deleting any sub-store. Any attempt to do so by clearing the sub-store name string and saving it will cause the CMMS to output the error message below.



The figure below shows the pop-up dialog panel for working with this facility.

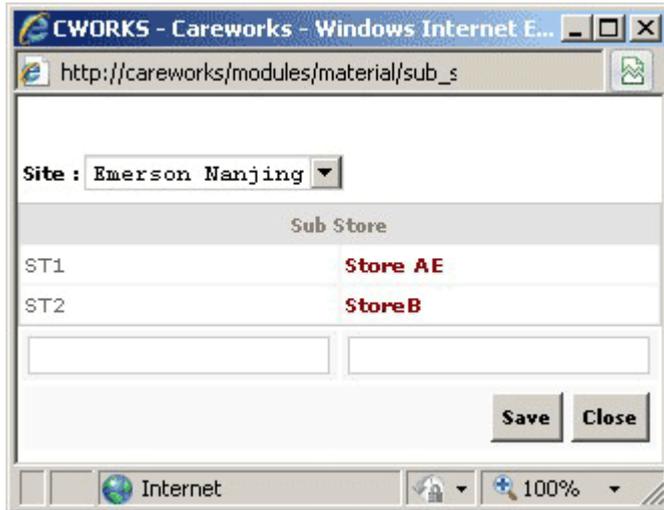
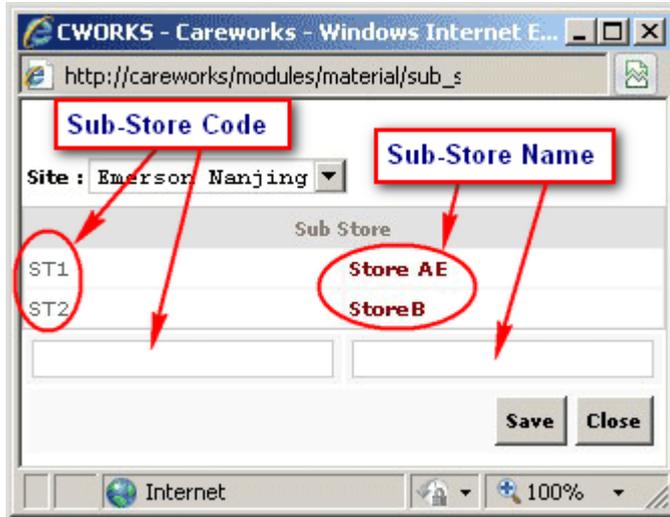
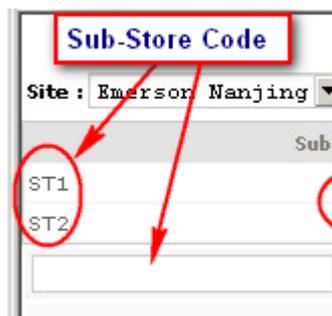


Figure 105: General Listing of Sub-Stores via the Pop-up Dialog Panel



Here are the steps to add new sub-store:

1. To add new sub-stores, enter the **sub-store codes** into the left input box as shown below



2. Enter the **sub-store name** into the right input box shown below.



3. Click  to save new sub-store.
 4. Click  to close the dialog panel.
 5. Finish.
-

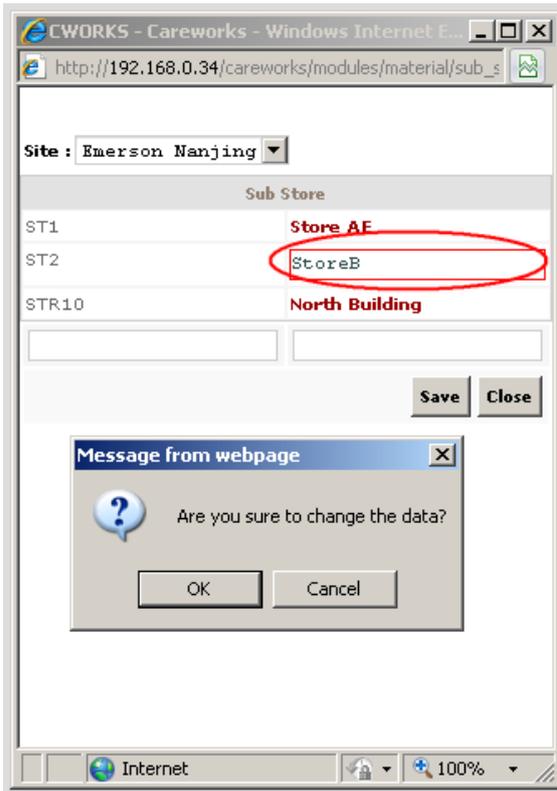
Here are the steps to **change the existing sub-store names**:

1. In the sub-store dialog panel, click on **existing sub-store name** that you want to change. (Note the sub-store names are actually links for editing the names).



2. After you clicked the **sub-store name**, the CMMS will place the name in editing mode to allow you to change it.
3. Click  to save the changes to the sub-store.

- The CMMS will prompt you for confirmation that you want to change the name as shown below.



- Click **OK** to proceed. Otherwise, click **Cancel** to abort.
- If you click **OK**, the CMMS will save the changes and output the report shown below - if nothing goes wrong.



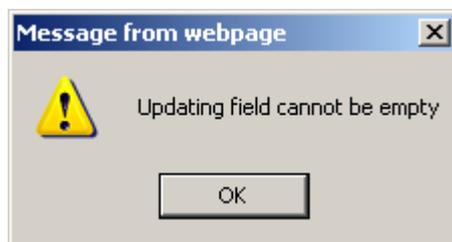
- To close the dialog panel, Click .
 - Finish.
-

8.10 How to View, Add, Edit Suppliers



The CMMS Material section also provides the facility to manage suppliers. You can access this facility by clicking on the icon above and it will take you to the screen shown in **Figure 106** below. As a recommendation, always check that you have the correct site – before you begin working.

This facility allows you to view the general listing of suppliers on a particular site, quickly add new suppliers and edit suppliers' details. However, it strictly prohibits you from deleting any suppliers. If attempt to save an empty supplier name string, it will cause the CMMS to output the error message below.



Similarly, when you are **editing** the supplier details, you will also get error message below if you attempt to save an empty supplier name string.



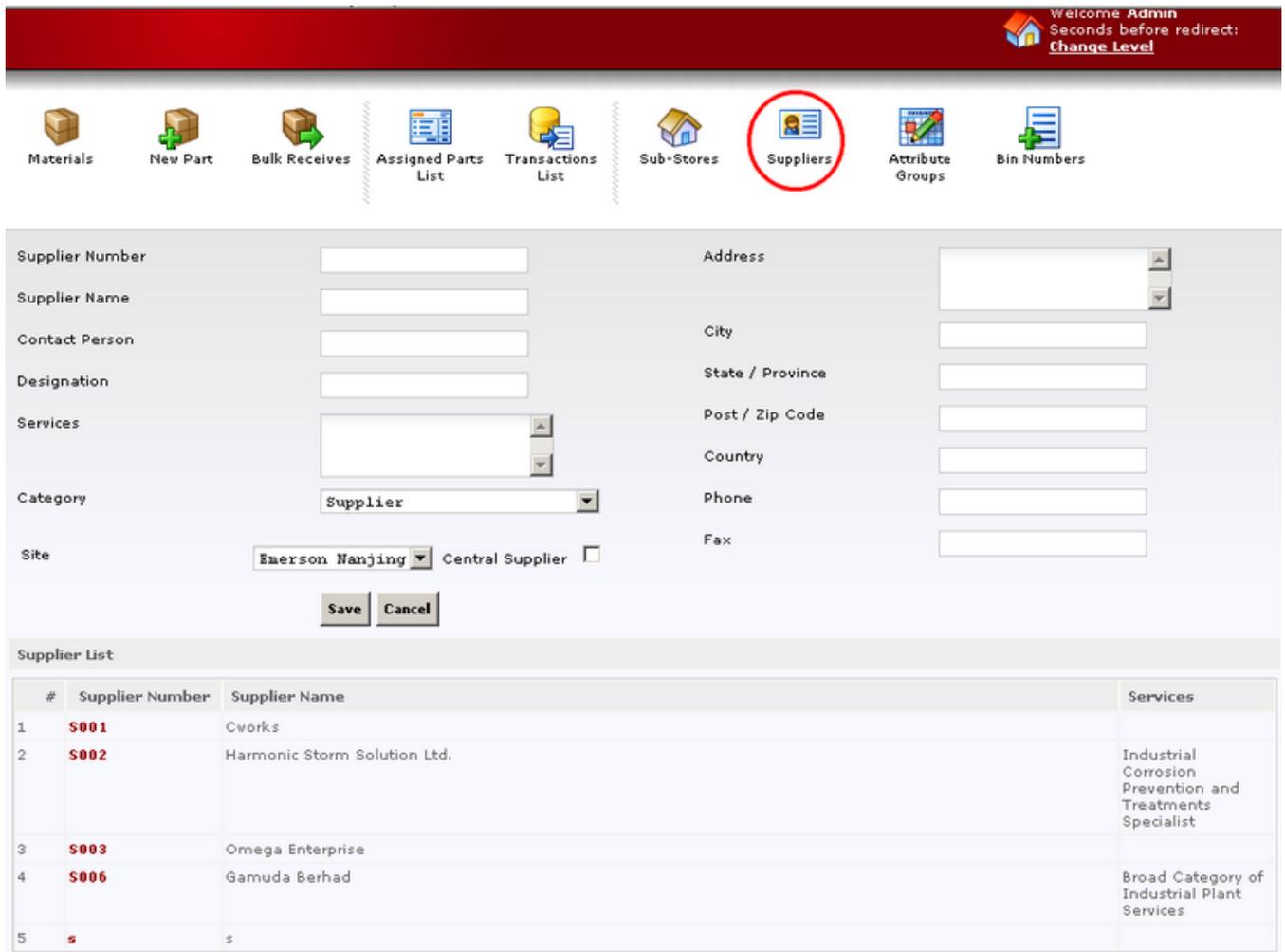
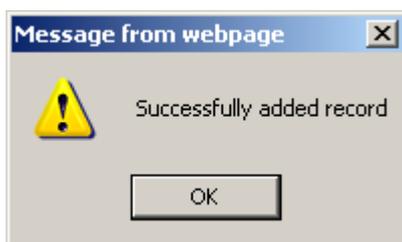


Figure 106: Suppliers Facility – Adding New Suppliers and Edit Supplier Form

8.10.1 How to Add New Suppliers

To add a new supplier, fill in the appropriate fields in the form of Figure 106 shown above and click **Save**. If the save is successfully, the CMMS will report as shown below, and the new supplier name will appear in the **supplier listing** below the form.



That completes adding a new supplier.

8.10.2 How to Edit and Update Existing Supplier Detail

The screenshot shows the 'Suppliers' menu item circled in red. Below it is a form for editing a supplier's details. The 'Supplier Number' field contains 'S15' and is circled in red. The form includes fields for Supplier Name, Contact Person, Designation, Services, Category, Site, Address, City, State / Province, Post / Zip Code, Country, Phone, and Fax. The 'Update' and 'Cancel' buttons are visible. Below the form is a 'Supplier List' table with 8 rows. The 7th row, corresponding to Supplier Number 'S15', is circled in red.

| # | Supplier Number | Supplier Name | Services |
|---|-----------------|-----------------------------------|-----------------------------------------------------------|
| 1 | S001 | Craft Metal Works | |
| 2 | S002 | Harmonic Storm Solution Ltd. | Industrial Corrosion Prevention and Treatments Specialist |
| 3 | S003 | Omega Enterprise | |
| 4 | S006 | Gamuda Berhad | Broad Category of Industrial Plant Services |
| 5 | S | Gardon Marks | Biometric Equipment Sales and Calibration Services |
| 6 | S11 | ADCO Jeramin Corp. | Engineering Cables Supplier |
| 7 | S15 | Johnsons Intelligent Systems | Heavy Portable Lifting Equipments |
| 8 | S005 | Liebermann Industrial Compressors | Sales, Services and repairs of Compressors and pumps |

Here are the steps to edit existing supplier details,

1. Go to **Figure 106** above and set the correct **site** using the drop-down list as show below.



The CMMS will refresh the supplier listing every time you select a new site.

2. In the **supplier listing**, click on the **Supplier Number** to select and load its details into **Figure 106** for editing.
3. Edit the details accordingly.
4. Click Update button when you are ready to save your changes.

If the save is successful, you should see the message below.



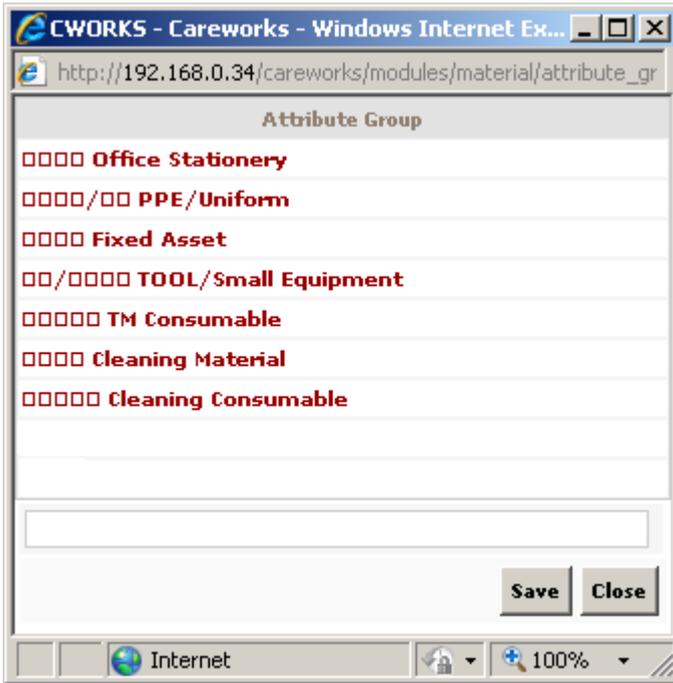
5. Finish.

This completes the description to edit existing supplier details.

8.11 How to View, Add and Edit Attribute Groups

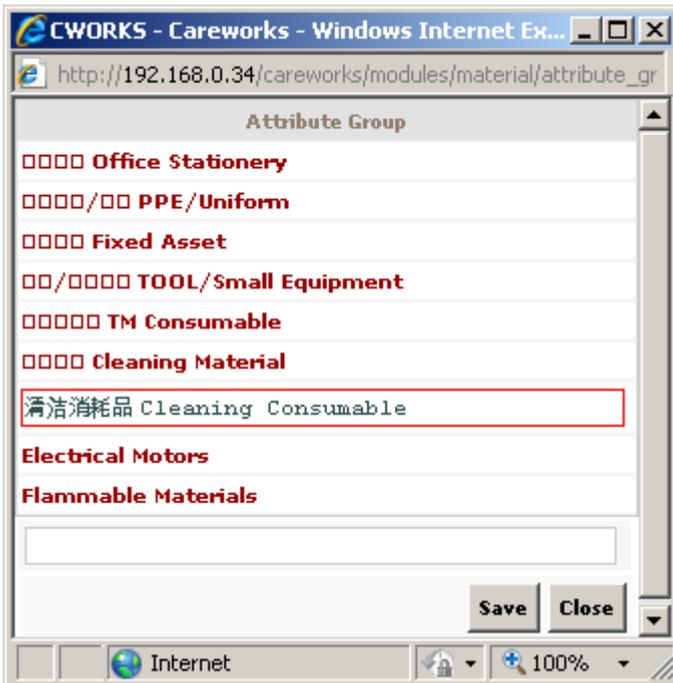


This facility enables you to view or edit existing **Attribute Group** and to add a new one **Attribute Group**.



To add a new **Attribute Group** type in the name and click **Save**.

To edit an **Attribute Group**, click **Edit**, do the appropriate change and then click **save** to save or click **Cancel** to abort. This is shown below.



That completes this section description.

8.12 How to View, Add and Edit Bin Numbers

This facility will enable you to create new bin numbers, view and edit existing **Bin Numbers**.

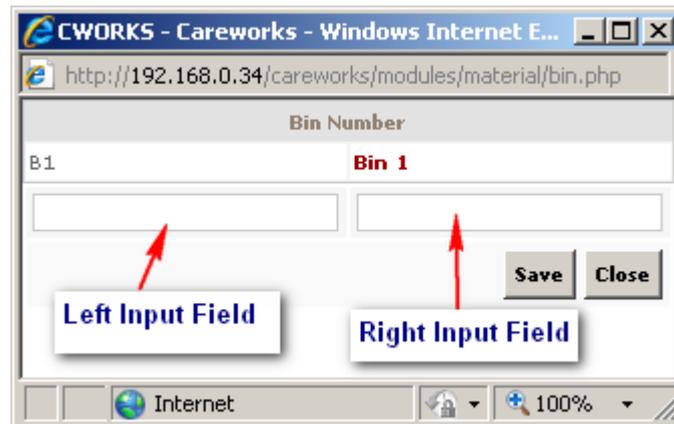


Figure 107: A Pop-Up Panel for Adding New Bin Number and Editing Existing Ones



Here are the steps to **create new bin number**:

1. Click the Bin Numbers icon shown above in order to pop-up the **Bin Number Panel** as shown in **Figure 107** above.
2. Enter the **bin number** in the left input field.
3. Type its **description** in the right input field.
4. Click to save the new bin details. After clicking the save button, the CMMS will save the new bin number and output the message shown below.



Click OK to close the message.

5. Finally, click to return to the Material screen.
6. Finish.

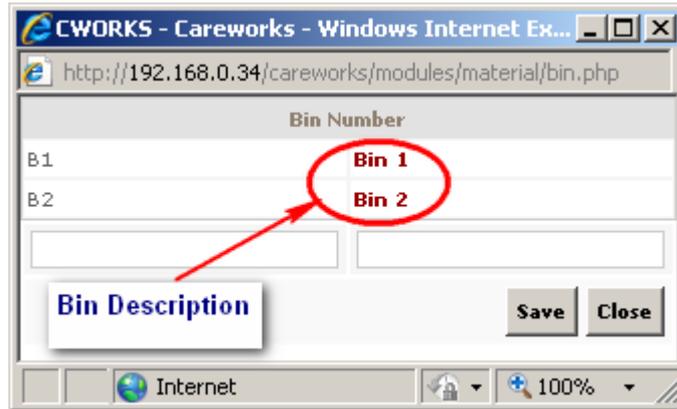
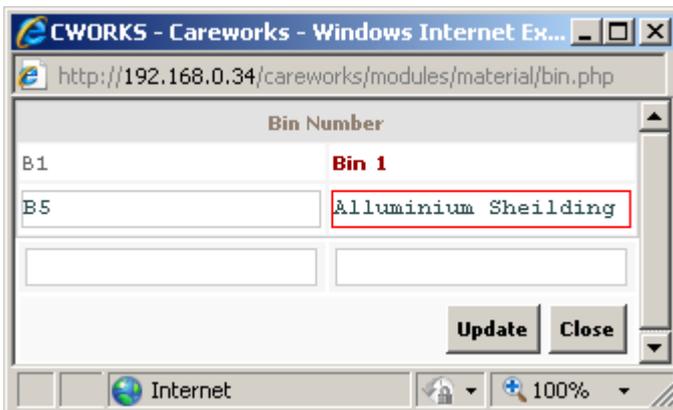


Figure 108: Editing Existing Bin Numbers



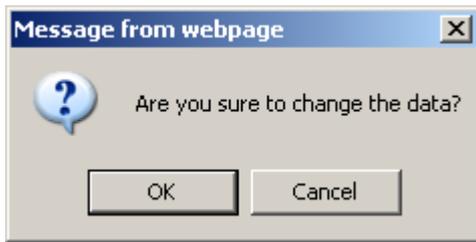
Here are the steps to **edit a bin number**:

1. Click the **Bin Numbers icon** shown above in order to pop-up the **Bin Number Panel** as shown in **Figure 108** above.
2. Click on the Bin Number Description in order to edit a particular Bin Details. This action will cause the bin number to become editable as shown below.



Edit the fields accordingly.

3. Click Update to save the changes. The CMMS will prompt you to confirm your action with the message below. Click **OK** to save.



4. The CMMS will save the data and output the message below.



5. Click OK to close the message.
6. Click  to close the **Bin Panel** and return to Material Screen.
7. Finish.

That completes this section.

8.13 How to Issue, Return, Adjustment, Transfer Part, etc

8.13.1 How to Carry Out Single-Delivery Processing for Adding to Stock

In order to perform this processing, first, you must select the part number by clicking the ellipsis



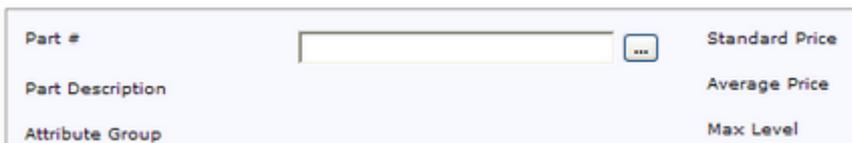
button and selecting the part you want to process.



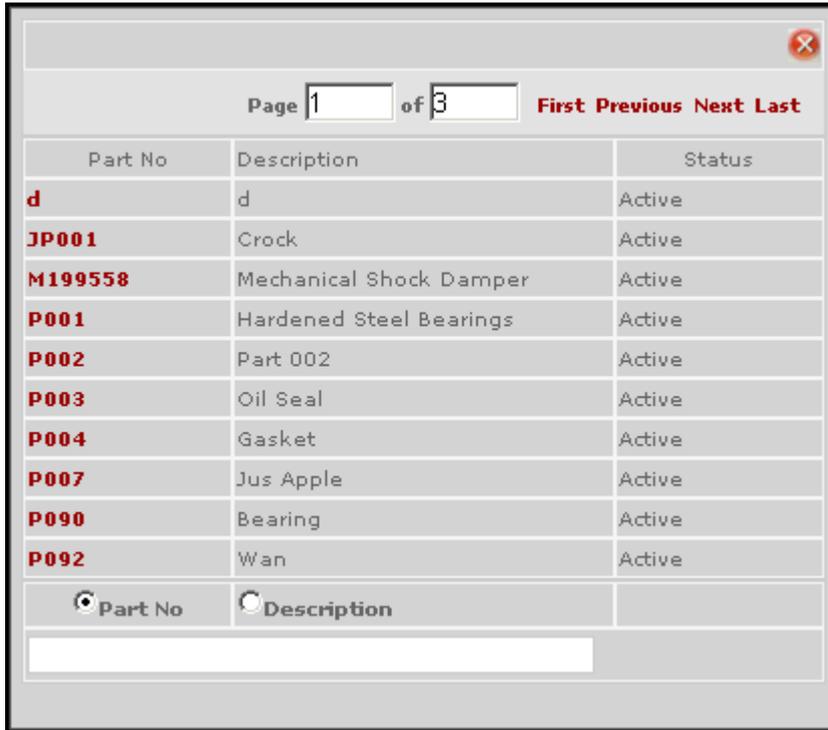
Figure 109: Single-Delivery Processing

To **receive** parts from a delivery, the steps are as follows:

1. Go to the **Material Opening Screen**.



In order to receive a specific part, click the ellipsis  button next to **Part #** input field as shown above. Consequently, the CMMS will pop-up the part listing in the panel as shown below.



| Part No | Description | Status |
|----------------|-------------------------|--------|
| d | d | Active |
| JP001 | Crock | Active |
| M199558 | Mechanical Shock Damper | Active |
| P001 | Hardened Steel Bearings | Active |
| P002 | Part 002 | Active |
| P003 | Oil Seal | Active |
| P004 | Gasket | Active |
| P007 | Jus Apple | Active |
| P090 | Bearing | Active |
| P092 | Wan | Active |

Part No Description

- Next, select the **part to receive** by clicking on its corresponding part number from the **Part No column** (the first column in the figure above).
- After you select the part, the CMMS will load the **part details** into the form as shown below. The CMMS can load those part details because you or someone else has previously set up the sub store for receiving such a part. Had the sub store been set up for some other parts then you will see all the fields below cleared to zero because the part number of the sub store and the part to receive are mismatched. This is a good thing as it stops wrong

parts from going into wrong sub stores.

MATERIAL
Welcome Admin
Seconds before redirect: 894
[Change Level](#)

Materials

New Part

Update Part

Bulk Receives

Assigned Parts List

Transactions List

Sub-Stores

Suppliers

Attribute Groups

Bin Numbers

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | <input type="text" value="M199558"/> | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 18.9375 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 5 |

Stock Balance by Sub Store and Site

| | | | |
|----------------------------------------------|----------------------------------------------|--|--|
| Site | <input type="text" value="Emerson Nanjing"/> | | |
| Sub Store | <input type="text" value="Store AE"/> | | |
| Bin Num <input type="checkbox"/> Description | B1 - Bin 1 | | |

| | Sub Store | Site |
|----------------------|--------------|--------------|
| Total Received | 32.00 | 32.00 |
| Total Issued | 0.00 | 0.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 0.00 | 0.00 |
| Total Balance | 32.00 | 32.00 |

Receive
Issue
Return
Adjustment
Sub-Store Transfer
Purchase Proposal

| | | | |
|-------------|----------------------------------------------|---------------|-------------------------------|
| Date | <input type="text"/> | D.O. / G.R.N. | <input type="text"/> |
| | <input type="button" value="Clear"/> | Supplier | <input type="text" value=""/> |
| P.R. / P.D. | <input type="text"/> | Remarks | <input type="text"/> |
| Quantity | <input type="text"/> | | |
| Unit Price | <input type="text"/> | | |
| Total | <input type="button" value="Add into list"/> | | |

| # | Date | PR/PD | DO/GRN | Supplier | Qty | PPU | Total | Site | Sub Store | Transfer | From Site | From Sub Store | Remarks |
|---|------------------|-------|---------|------------------------------|-------|---------|--------|-----------------|-----------|----------|-----------|----------------|-----------------------------------------------------------------------|
| 1 | 16 December 2010 | PO-90 | DO-1125 | Harmonic Storm Solution Ltd. | 30.00 | 20.0000 | 600.00 | Emerson Nanjing | Store AE | 0 | | | This supplier is not yet on the suppliers listing. Very good service. |
| 2 | 3 January 2011 | | | Harmonic Storm Solution Ltd. | 2.00 | 3.0000 | 6.00 | Emerson Nanjing | Store AE | 0 | | | |

Grand Total Cost : 606.00

- Select the **Site** and the **sub store** from their respective drop-down lists. This is to ensure that the part will go to the intended destination.

After you selected the **Site** and the **sub store**, the CMMS should automatically update the part details as shown below, assuming that this sub store has been previously set up for this part. Otherwise, every field shown below will be zero.

| | | | |
|------------------|------------------------|------------------|-----------|
| Part # | ECP-QP-080041-WO | Standard Price | 5512.3200 |
| Part Description | HEATER ELEMENT 10KW-WO | Average Price | 5512.3200 |
| Attribute Group | ECP | Max Level | 3.00 |
| Manufacturer | | Reorder Level | 2.00 |
| Specifications | | Reorder Quantity | 1.00 |
| UOM | PCS | Minimum Level | 1.00 |
| Status | Active | Lead Time | 0 |

| Stock Balance by Sub Store and Site | | |
|-------------------------------------|-----------------------------|------|
| Site | Sub Store | Site |
| MISCELLANEOUS | STORE ENG | |
| Bin Num | Description | |
| | CABINET3TOP - CABINET 3 TOP | |
| Total Received | 0.00 | 0.00 |
| Total Issued | 0.00 | 0.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 1.00 | 1.00 |
| Total Balance | 1.00 | 1.00 |

Figure 110: The sub store associated with the Part

- In order to receive the parts, you will have to fill in most of the fields shown below accordingly and click **Add into list** button. Clicking the **Add into list** button will copy all the details from the fields to the listing immediately below the form.

| Receive | Issue | Return | Adjustment | Sub-Store Transfer | Purchase Proposal | | | | | | | | |
|-------------------------|----------------------|---------------|----------------------|--------------------|-------------------|-----|-------|------|-----------|----------|-----------|----------------|---------|
| Date | <input type="text"/> | D.O. / G.R.N. | <input type="text"/> | | | | | | | | | | |
| P.R. / P.O. | <input type="text"/> | Supplier | <input type="text"/> | | | | | | | | | | |
| Quantity | <input type="text"/> | Remarks | <input type="text"/> | | | | | | | | | | |
| Unit Price | <input type="text"/> | | | | | | | | | | | | |
| Total | 0.00 | | | | | | | | | | | | |
| Add into list | | | | | | | | | | | | | |
| # | Date | PR/PD | DO/GRN | Supplier | Qty | PPU | Total | Site | Sub Store | Transfer | From Site | From Sub Store | Remarks |
| Grand Total Cost : 0.00 | | | | | | | | | | | | | |

Figure 111: Fill in the Part delivery Details into the form and click Add into List to save

- Consequently, the CMMS will add the received part details to the list as shown below. Each row represents one received part as shown in **Figure 112** below.

| # | Date | PR/PO | DO/GRN | Supplier | Qty | PPU | Total | Site | Sub Store | Transfer | From Site | From Sub Store | Remarks |
|---|------------------|-------|---------|------------------------------|-------|---------|--------|-----------------|-----------|----------|-----------|----------------|-----------------------------------------------------------------------|
| 1 | 16 December 2010 | PO-90 | DO-1125 | Harmonic Storm Solution Ltd. | 30.00 | 20.0000 | 600.00 | Emerson Nanjing | Store AE | 0 | | | This supplier is not yet on the suppliers listing. Very good service. |
| 2 | 3 January 2011 | | | Harmonic Storm Solution Ltd. | 2.00 | 3.0000 | 6.00 | Emerson Nanjing | Store AE | 0 | | | |

Grand Total Cost : 606.00

Figure 112: Received parts listing

- Repeat adding received part as outline in the previous few steps if you have more to add.
- Finish.

8.13.2 How to Issue Parts from the Material Store

When maintenance works require various spare parts in order to carry out jobs, the party – generally the material store – is responsible for issuing the spare parts. Moreover, this facility has been integrated with work orders, departments, sub stores and purchasing to provide all the essential steps needed to not only issue spare parts to maintenance works but also to receive spare parts delivery. The part number and the quantity issued are recorded.

In order to perform this processing, first, you must select the part number by clicking the ellipsis



button and selecting the part you want to process.



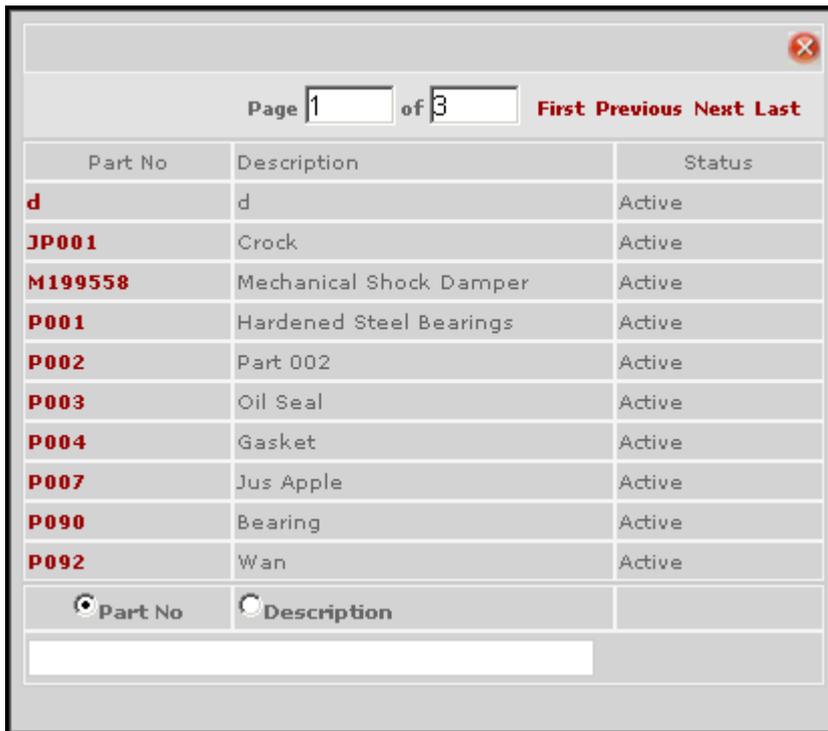
Figure 113: Single-Delivery Processing

To **issue parts** from the store, the steps are as follows:

1. Go to the **Material Opening Screen**.



In order to issue a specific part, click the ellipsis  button next to **Part #** input field as shown above. Consequently, the CMMS will pop-up the part listing in the panel as shown below.



Page 1 of 3 First Previous Next Last

| Part No | Description | Status |
|---------|-------------------------|--------|
| d | d | Active |
| JP001 | Crock | Active |
| M199558 | Mechanical Shock Damper | Active |
| P001 | Hardened Steel Bearings | Active |
| P002 | Part 002 | Active |
| P003 | Oil Seal | Active |
| P004 | Gasket | Active |
| P007 | Jus Apple | Active |
| P090 | Bearing | Active |
| P092 | Wan | Active |

Part No Description

- Next, select the part to issue from the **Part No** column by clicking on the part number.

3. After you select the part, the CMMS will load the part details into the form as shown below.

MATERIAL
Welcome Admin
Seconds before redirect: 894
[Change Level](#)

Materials

New Part

Update Part

Bulk Receives

Assigned Parts List

Transactions List

Sub-Stores

Suppliers

Attribute Groups

Bin Numbers

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | <input type="text" value="M199558"/> | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 18.9375 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 5 |

Stock Balance by Sub Store and Site

| | | | |
|----------------------------------------------|----------------------------------------------|--|--|
| Site | <input type="text" value="Emerson Nanjing"/> | | |
| Sub Store | <input type="text" value="Store AE"/> | | |
| Bin Num <input type="checkbox"/> Description | B1 - Bin 1 | | |

| | Sub Store | Site |
|----------------------|--------------|--------------|
| Total Received | 32.00 | 32.00 |
| Total Issued | 0.00 | 0.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 0.00 | 0.00 |
| Total Balance | 32.00 | 32.00 |

Receive
Issue
Return
Adjustment
Sub-Store Transfer
Purchase Proposal

| | | | |
|-------------|----------------------------------------------|---------------|-------------------------------|
| Date | <input type="text"/> | D.O. / G.R.N. | <input type="text"/> |
| | <input type="button" value="Clear"/> | Supplier | <input type="text" value=""/> |
| P.R. / P.D. | <input type="text"/> | Remarks | <input type="text"/> |
| Quantity | <input type="text"/> | | |
| Unit Price | <input type="text"/> | | |
| Total | <input type="button" value="Add into list"/> | | |

| # | Date | PR/PD | DO/GRN | Supplier | Qty | PPU | Total | Site | Sub Store | Transfer | From Site | From Sub Store | Remarks |
|---|------------------|-------|---------|------------------------------|-------|---------|--------|-----------------|-----------|----------|-----------|----------------|-----------------------------------------------------------------------|
| 1 | 16 December 2010 | PO-90 | DO-1125 | Harmonic Storm Solution Ltd. | 30.00 | 20.0000 | 600.00 | Emerson Nanjing | Store AE | 0 | | | This supplier is not yet on the suppliers listing. Very good service. |
| 2 | 3 January 2011 | | | Harmonic Storm Solution Ltd. | 2.00 | 3.0000 | 6.00 | Emerson Nanjing | Store AE | 0 | | | |

Grand Total Cost : 606.00

- Select the **Site** and the **sub store** from their respective drop-down lists. After you select the **Site** and the **sub store**, the CMMS should load or refresh the part details accordingly. This will be the part you are going to issue.

The screenshot displays the part details for 'HEATER ELEMENT 10KW-WO'. The part number is ECP-QP-080041-WO. The standard price is 5512.3200, and the average price is also 5512.3200. The attribute group is ECP, and the manufacturer is PCS. The status is Active. The stock balance table shows the following data:

| | Sub Store | Site |
|------------------|-----------|------|
| Total Received | 0.00 | 0.00 |
| Total Issued | 0.00 | 0.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 1.00 | 1.00 |
| Total Balance | 1.00 | 1.00 |

Figure 114: The sub store associated with the Part

- In order to issue parts, you will have to fill in the fields shown below and click .

The screenshot shows the 'Issue' tab in the CMMS interface. The fields are filled with the following information:

- Date: 13 January 2011
- Quantity: 1
- Avg Unit Price: 253.2300
- Total: 253.23
- Work Order: ENG10000023
- Department: (empty)
- Remarks: (empty)

The 'Add into list' button is visible at the bottom left of the form. Below the form is a table with the following columns: #, Date, Work Order, Department, Qty, Avg PPU, Total, Site, Sub Store, Transfer, To Site, To Sub Store, Remarks. The Grand Total Cost is 0.00.

Figure 115: Fill in the Issued Related Details

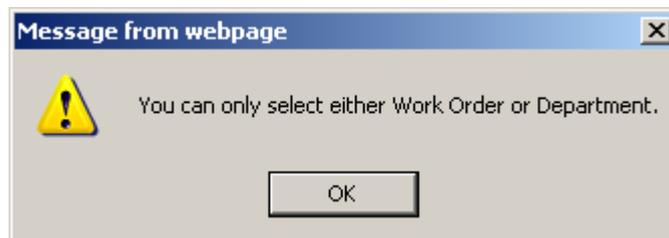
When you click the ellipsis button  to select the **Work Order**, you will get a pop-up window listing of work orders as shown below.

| Workorder No | Problem Description |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| ENG1000023 | Screen cables 7C 1MM X 100 METERS for Ice water monitoring system Refer to ACDC ELECTRICAL QUOTE NO: QT-10985 |
| ENG1000034 | to supply labour,tool and material to repair roof leaking at workshop. |
| ENG1000036 | to fix cabling wiring system for safety. |
| ENG1000048 | 1. electrode MOX s/s 308L 16-2.5mm =2.0kg ,2.welding glove(short) =12 set,3.Permatex High Temp RTVSilicone 26B =12 tube, 4.Red melian compound = 6 bottle |
| ENG1000049 | Kaise meter model : 1015 due to malfunction |
| ENG1000054 | Order 12 pcs of AAA battery Instrument |
| ENG1000056 | TBA 22/7 OUTFEED CONVEYER MOTOR,BEARING 6204 2RS,6004 Z,6201 2RS 2PCS OILSEAL 20X30X5,25X42X7 1PCS |

Click on a **Work order No.** to select one.

After you select the **Work Order**, skip selecting Department because you can only select one but not both. However, you are free to change your choice at any time without any adverse effect, despite **notification message** below.

Note: If, first, you select either Work Order or Department and then you select the other, you will receive the **notification message** below. Click OK to close the message.



6. Issue the part by clicking the button **Add into list ▼**.

The CMMS will notify you with the message below when it successfully completes the issue processing.



7. Consequently, the CMMS will add the issued part details to the list as shown below. Each row represents one received part as shown in **Figure 112** below.

| # | Date | Work Order | Department | Qty | Avg PPU | Total | Site | Sub Store | Transfer | To Site | To Sub Store | Remarks |
|---|-----------------------|-------------|------------|------|---------|-------|-------------|-----------|----------|---------|--------------|---------|
| 1 | 13 January 2011 | ENG10000023 | | 1.00 | 0.0000 | 0.00 | ENGINEERING | STORE | ENG | | | |

Grand Total Cost : 0.00

Figure 116: Received parts listing

8. Repeat the steps above if you have more parts to issue.
9. Finish.

8.13.3 How to Return Parts back to Store in Material

This facility allows you to capture any spare part returned to the store.

In order to return parts to the store, you will have to fill in the form below and click **Add into list ▼**. However, before you begin filling in the form, first, you need to be aware of one rule or requirement. This rule states that you can only return parts issued to you. Any attempt to return parts that the store has never issued to you is a mistake. If your attempt failed then there is no problem.

What happen if you accident return somebody else's part?

Yes, this can happen.

Consider if you accidentally select a work order or a department, totally unrelated to you, but one that has been issued with the same part number you are attempting to return. In this case, you would have created an error in the store's accounting that could lead to confusion. In order to prevent such unwanted situation, the best advice is – try not to make this mistake.

MATERIAL
Welcome **Admin**
Seconds before redirect: 894
[Change Level](#)



Materials



New Part



Update Part



Bulk Receives



Assigned Parts List



Transactions List



Sub-Stores



Suppliers



Attribute Groups



Bin Numbers

| | | | |
|------------------|-----------------------------------------------|------------------|----------|
| Part # | <input type="text" value="ECP-NM-032661-W0"/> | Standard Price | 253.2300 |
| Part Description | CUP DISPENSER | Average Price | 253.2300 |
| Attribute Group | ECP | Max Level | 6.00 |
| Manufacturer | | Reorder Level | 3.00 |
| Specifications | | Reorder Quantity | 2.00 |
| UOM | pcs | Minimum Level | 2.00 |
| Status | Active | Lead Time | 0 |

Stock Balance by Sub Store and Site

| | | | |
|-----------|------------------------------------------|-------------|----------------------------------|
| Site | <input type="text" value="ENGINEERING"/> | | |
| Sub Store | <input type="text" value="STORE ENG"/> | | |
| Bin Num | <input type="text" value="E12"/> | Description | <input type="text" value="E12"/> |

| | Sub Store | Site |
|----------------------|-------------|-------------|
| Total Received | 0.00 | 0.00 |
| Total Issued | 1.00 | 1.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 6.00 | 6.00 |
| Total Balance | 5.00 | 5.00 |

Receive
Issue
Return
Adjustment
Sub-Store Transfer
Purchase Proposal

| | | | | | | |
|------------------|----------------------|-------------------------------------------------------------------------------------|--------------------------------------|------------|-------------------------------------------|--------------------------------------------------------------------|
| Date | <input type="text"/> |  | <input type="button" value="Clear"/> | Work Order | <input type="text"/> | <input data-bbox="1300 1388 1332 1422" type="button" value="..."/> |
| Quantity Balance | 0 | | | Department | <input type="text"/> | <input data-bbox="1300 1456 1332 1489" type="button" value="..."/> |
| Quantity Return | <input type="text"/> | | | Remarks | <input style="width: 100%;" type="text"/> | |
| Avg Unit Price | <input type="text"/> | | | | | |
| Total | 0.00 | | | | | |

| # | Date | WO | Dept | Qty | Avg PPU | Total | Site | Sub Store | Remarks |
|-------------------------|------|----|------|-----|---------|-------|------|-----------|---------|
| Grand Total Cost : 0.00 | | | | | | | | | |

Figure 117: Details of Part Returned to Sub Store

To **return parts** to the store, the steps are as follows:

1. Go to **Material Opening Screen.**

| | | |
|------------------|----------------------|----------------|
| Part # | <input type="text"/> | Standard Price |
| Part Description | | Average Price |
| Attribute Group | | Max Level |

In order to return a specific part, click the ellipsis  button next to **Part #** input field as shown above. Consequently, the CMMS will pop-up the part listing in the panel as shown below.

| Part No | Description | Status |
|----------------|-------------------------|--------|
| d | d | Active |
| JP001 | Crock | Active |
| M199558 | Mechanical Shock Damper | Active |
| P001 | Hardened Steel Bearings | Active |
| P002 | Part 002 | Active |
| P003 | Oil Seal | Active |
| P004 | Gasket | Active |
| P007 | Jus Apple | Active |
| P090 | Bearing | Active |
| P092 | Wan | Active |

Part No Description

2. Select the **part** you want to return by clicking on a part number in column one above.

3. After you select the part, the CMMS will load the part details into the form as shown below.

MATERIAL
Welcome Admin
Seconds before redirect: 894
[Change Level](#)

Materials

New Part

Update Part

Bulk Receives

Assigned Parts List

Transactions List

Sub-Stores

Suppliers

Attribute Groups

Bin Numbers

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | <input type="text" value="M199558"/> | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 18.9375 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 5 |

Stock Balance by Sub Store and Site

| | | | |
|-----------|----------------------------------------------|--|--|
| Site | <input type="text" value="Emerson Nanjing"/> | | |
| Sub Store | <input type="text" value="Store AE"/> | | |
| Bin Num | <input type="text" value="B1 - Bin 1"/> | | |

| | Sub Store | Site |
|----------------------|--------------|--------------|
| Total Received | 32.00 | 32.00 |
| Total Issued | 0.00 | 0.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 0.00 | 0.00 |
| Total Balance | 32.00 | 32.00 |

| | | | | | |
|---------|-------|--------|------------|--------------------|-------------------|
| Receive | Issue | Return | Adjustment | Sub-Store Transfer | Purchase Proposal |
|---------|-------|--------|------------|--------------------|-------------------|

| | | | |
|-------------|----------------------------------------------|---------------|-------------------------------|
| Date | <input type="text"/> | D.O. / G.R.N. | <input type="text"/> |
| | <input type="button" value="Clear"/> | Supplier | <input type="text" value=""/> |
| P.R. / P.D. | <input type="text"/> | Remarks | <input type="text"/> |
| Quantity | <input type="text"/> | | |
| Unit Price | <input type="text"/> | | |
| Total | <input type="button" value="Add into list"/> | | |

| # | Date | PR/PD | DO/GRN | Supplier | Qty | PPU | Total | Site | Sub Store | Transfer | From Site | From Sub Store | Remarks |
|---|------------------|-------|---------|------------------------------|-------|---------|--------|-----------------|-----------|----------|-----------|----------------|-----------------------------------------------------------------------|
| 1 | 16 December 2010 | PO-90 | DO-1125 | Harmonic Storm Solution Ltd. | 30.00 | 20.0000 | 600.00 | Emerson Nanjing | Store AE | 0 | | | This supplier is not yet on the suppliers listing. Very good service. |
| 2 | 3 January 2011 | | | Harmonic Storm Solution Ltd. | 2.00 | 3.0000 | 6.00 | Emerson Nanjing | Store AE | 0 | | | |

Grand Total Cost : 606.00

- Select the **Site** and the **sub store** from their respective drop-down lists. After you select the **Site** and the **sub store**, the CMMS should load the part details into the form as shown below.

| | | | |
|------------------|-----------------------------------------------|------------------|-----------|
| Part # | <input type="text" value="ECP-QP-080041-WO"/> | Standard Price | 5512.3200 |
| Part Description | HEATER ELEMENT 10KW-WO | Average Price | 5512.3200 |
| Attribute Group | ECP | Max Level | 3.00 |
| Manufacturer | | Reorder Level | 2.00 |
| Specifications | | Reorder Quantity | 1.00 |
| UOM | PCS | Minimum Level | 1.00 |
| Status | Active | Lead Time | 0 |

| Stock Balance by Sub Store and Site | | | |
|-------------------------------------|-----------|---------|-----------------------------|
| Site | Sub Store | Bin Num | Description |
| MISCELLANEOUS | STORE ENG | | CABINET3TOP - CABINET 3 TOP |

| | Sub Store | Site |
|------------------|-----------|------|
| Total Received | 0.00 | 0.00 |
| Total Issued | 0.00 | 0.00 |
| Total Return | 0.00 | 0.00 |
| Total Adjustment | 1.00 | 1.00 |
| Total Balance | 1.00 | 1.00 |

Figure 118: The sub store associated with the Part

- In order to return the part, you have to fill in the fields shown in the form below and click

Note: You need to remember two rules.

- You can only return parts **issued to you**. It is a **mistake** to attempt to return any part never issued to you. This includes **accidentally** returning somebody else's part.
- If you select '**Work Order**' to associate with the part to return, you cannot select '**Department**' and vice versa. You may only **choose one** but not both.
- You are free to change your choice in **(2)** above at any time without any adverse effect, despite the **notification message** you received.

Figure 119: Fill in the Part Details

Fill in the date using the calendar button. Fill in the quantity to return.

Assuming you are returning a part linked or associated with a work order, here is what you do.

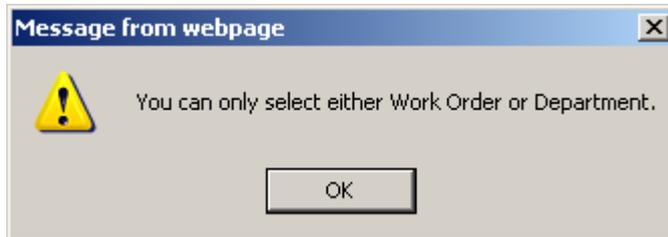
Click the ellipsis button  to select a **Work Order** from a pop-up window listing of work orders as shown below.

| Workorder No | Problem Description |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ENG1000023 | Screen cables 7C 1MM X 100 METERS for Ice water monitoring system Refer to ACDC ELECTRICAL QUOTE NO: QT-10985 |
| ENG1000034 | to supply labour,tool and material to repair roof leaking at workshop. |
| ENG1000036 | to fix cabling wiring system for safety. |
| ENG1000048 | 1. electrode MOX s/s 308L 16-2.5mm =2.0kg ,2.welding glove(short) =12 set,3.Permatex High Temp RTV Silicone 26B =12 tube, 4.Red melian compound = 6 bottle |
| ENG1000049 | Kaise meter model : 1015 due to malfunction |
| ENG1000054 | Order 12 pcs of AAA battery Instrument |
| ENG1000056 | TBA 22/7 OUTFEED CONVEYER MOTOR,BEARING 6204 2RS,6004 2,6201 2RS 2PCS OILSEAL 20X30X5,25X42X7 1PCS |

Select the work order by clicking on the **Work order No.** in the listing.

After selecting the **Work Order**, skip selecting Department because you can only select one but not both. However, you are free to change your choice at any time without any adverse effect, despite **notification message** below.

Note: If, first, you select a Work Order and later you decided to select a Department, you will receive the **notification message** below. Click OK to close the message to continue. This is just a warning to let you know that you can only select one or the other.



- Return the part by clicking the button .

The CMMS will notify you with the message below when it successfully completed the return processing.



- Consequently, the CMMS will add the return part details to the list as shown below. Each row represents one return part.

| # | Date | WO | Dept | Qty | Avg PPU | Total | Site | Sub Store | Remarks |
|---|-----------------|---------------|------|------|---------|-------|-----------------|-----------|---------|
| 1 | 17 January 2011 | EMSNJ10001756 | | 1.00 | 18.9375 | 18.94 | Emerson Nanjing | Store AE | |

Grand Total Cost : 18.94

Figure 120: Received parts listing

- Repeat the steps above if you have more parts to return.
- Finish.

8.13.4 How to do Adjustments in Material

Whenever there is a mistake in any of the above transactions, data entry errors, or losses in the store, an ***Adjustment*** can be **done to correct the balance quantity**. Adjustment can only be done by an **authorize employee**. This authorization assignment is done in the ***Administration module***.

MATERIAL
Welcome Admin
Seconds before redirect: 895
[Change Level](#)


Materials


New Part


Update Part


Bulk Receives


Assigned Parts List


Transactions List


Sub-Stores


Suppliers


Attribute Groups


Bin Numbers

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | <input type="text" value="M199558"/> | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 18.9375 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 5 |

Stock Balance by Sub Store and Site

| | | | | |
|-----------------------|----------------------------------------------|--|--|--|
| Site | <input type="text" value="Emerson Nanjing"/> | | | |
| Sub Store | <input type="text" value="Store AE"/> | | | |
| Bin Num Description | B1 - Bin 1 | | | |

| | Sub Store | Site |
|----------------------|--------------|--------------|
| Total Received | 32.00 | 32.00 |
| Total Issued | 4.00 | 4.00 |
| Total Return | 1.00 | 1.00 |
| Total Adjustment | 0.00 | 0.00 |
| Total Balance | 29.00 | 29.00 |

Receive
Issue
Return
Adjustment
Sub-Store Transfer
Purchase Proposal

| | | | | |
|----------------|----------------------|--------------------------------------|-------------------|--------------------------------------------|
| Date | <input type="text"/> | <input type="button" value="Clear"/> | Authorized Person | <input type="text"/> |
| Quantity | <input type="text"/> | | Remarks | <input style="height: 20px;" type="text"/> |
| Avg Unit Price | 18.9375 | | | |
| Total | | | | |

| # | Date | Qty | Avg PPU | Total | Site | Sub Store | Authorized By | Remarks |
|-------------------------|------|-----|---------|-------|------|-----------|---------------|---------|
| Grand Total Cost : 0.00 | | | | | | | | |

Figure 121: Part Adjustment Form

To carry out **part adjustment**, the steps are as follows:

1. Go to **Material Opening Screen**.

In order to select a specific part for adjustment, click the ellipsis  button next to **Part #** input field as shown above. Consequently, the CMMS will pop-up the part listing in the panel as shown below.

| Part No | Description | Status |
|---------|-------------------------|--------|
| d | d | Active |
| JP001 | Crock | Active |
| M199558 | Mechanical Shock Damper | Active |
| P001 | Hardened Steel Bearings | Active |
| P002 | Part 002 | Active |
| P003 | Oil Seal | Active |
| P004 | Gasket | Active |
| P007 | Jus Apple | Active |
| P090 | Bearing | Active |
| P092 | Wan | Active |

2. Select the **part** you want to adjust by clicking on a part number in column one above.
3. After you select the part, the CMMS will load the part details into the form as shown in **Figure 121** above.
4. Select the **Site** and the **sub store** from their respective drop-down lists. After you select the **Site** and the **sub store**, the CMMS should load the part details into the form as shown

below.

| | | | |
|------------------|-----------------------------------------------|------------------|-----------|
| Part # | <input type="text" value="ECP-QP-080041-WO"/> | Standard Price | 5512.3200 |
| Part Description | HEATER ELEMENT 10KW-WO | Average Price | 5512.3200 |
| Attribute Group | ECP | Max Level | 3.00 |
| Manufacturer | | Reorder Level | 2.00 |
| Specifications | | Reorder Quantity | 1.00 |
| UOM | PCS | Minimum Level | 1.00 |
| Status | Active | Lead Time | 0 |

| Stock Balance by Sub Store and Site | | | |
|-------------------------------------|-----------|------------------|------|
| Site | Sub Store | Sub Store | Site |
| MISCELLANEOUS | STORE ENG | Total Received | 0.00 |
| | | Total Issued | 0.00 |
| | | Total Return | 0.00 |
| | | Total Adjustment | 1.00 |
| | | Total Balance | 1.00 |

Figure 122: The sub store associated with the Part

5. In order to adjust the part, you have to fill in the fields shown in the form below and click

Add into list ▼

| | | | | | |
|----------------|----------------------|--------------------------------------|-------------------|----------------------|------------------------------------|
| Receive | Issue | Return | Adjustment | Sub-Store Transfer | Purchase Proposal |
| Date | <input type="text"/> | <input type="button" value="Clear"/> | Authorized Person | <input type="text"/> | <input type="button" value="..."/> |
| Quantity | <input type="text"/> | | Remarks | <input type="text"/> | <input type="button" value="..."/> |
| Avg Unit Price | 18.9375 | | | | |
| Total | | | | | |
| | | Add into list ▼ | | | |

| # | Date | Qty | Avg PPU | Total | Site | Sub Store | Authorized By | Remarks |
|-------------------------|------|-----|---------|-------|------|-----------|---------------|---------|
| Grand Total Cost : 0.00 | | | | | | | | |

Figure 123: Fill in the Part Details

Fill in the date using the calendar button. Fill in the quantity to adjust by.

Click the ellipsis button to select the **Authorized Person** from a pop-up window listing of authorized employees as shown below.

Page 1 of 21 First Previous Next Last

| Employee No | Employee Name |
|--------------|---------------|
| EMSNJ-A001 | Admin |
| EMSNJ-015 | 000 |
| EMSNJ-8666 | 000 |
| EMSNJ-A00003 | 000 |
| EMSNJ-A002 | William Shi |
| EMSNJ-A003 | 00-Henlen Hu |
| EMSNJ-A004 | 00-Clara Liu |
| EMSNJ-A005 | 00-Zoe Fang |
| EMSNJ-A006 | 000 |
| EMSNJ-A007 | 000 |

Employee No
 Employee Name

Select an authorized person by clicking on the **Employee No.** in the listing. The fields in the form will be something as shown below.

Receive Issue Return **Adjustment** Sub-Store Transfer Purchase Proposal

Date: 17 January 2011 Clear Authorized Person: EMSNJ-A003

Quantity: 2 Remarks:

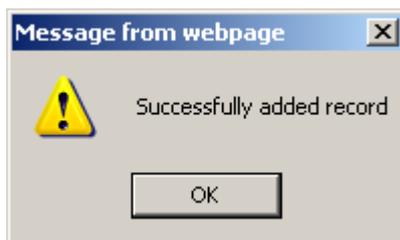
Avg Unit Price: 18.9375

Total: 37.88

| # | Date | Qty | Avg PPU | Total | Site | Sub Store | Authorized By | Remarks |
|-------------------------|------|-----|---------|-------|------|-----------|---------------|---------|
| Grand Total Cost : 0.00 | | | | | | | | |

- Commit the adjustment by clicking the button .

The CMMS will notify you with the message below when it successfully completed the processing.



- Consequently, the CMMS will add the adjustment details to the list as shown below. Each row represents one adjustment.

The screenshot shows a software interface for recording adjustments. At the top, there are tabs for 'Receive', 'Issue', 'Return', 'Adjustment' (which is selected), 'Sub-Store Transfer', and 'Purchase Proposal'. Below the tabs is a form with the following fields:

- Date:** A text input field with a calendar icon and a 'Clear' button.
- Quantity:** A text input field.
- Avg Unit Price:** A text input field containing the value '18.9375'.
- Total:** A text input field.
- Authorized Person:** A text input field with a dropdown arrow.
- Remarks:** A text input field with a dropdown arrow.

Below the form is a table with the following data:

| # | Date | Qty | Avg PPU | Total | Site | Sub Store | Authorized By | Remarks |
|---|-----------------|------|---------|-------|-----------------|-----------|---------------|---------|
| 1 | 17 January 2011 | 2.00 | 18.9375 | 37.88 | Emerson Nanjing | Store AE | 00-Henlen Hu | |

At the bottom right of the interface, it says 'Grand Total Cost : 37.88'.

Figure 124: Received parts listing

- Repeat the steps above if you have more adjustment to make.
- Finish.

8.13.5 How to do Sub Store to Sub Store Transfer of Parts in Material

This is for transferring parts from one **sub store** to **another**.

MATERIAL
Welcome Admin
Seconds before redirect: 895
[Change Level](#)


Materials


New Part


Update Part


Bulk Receives


Assigned Parts List


Transactions List


Sub-Stores


Suppliers


Attribute Groups


Bin Numbers

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | M199558 | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 18.9375 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 5 |

Stock Balance by Sub Store and Site

| | | | |
|-----------|-----------------|--|--|
| Site | Emerson Nanjing | | |
| Sub Store | Store AE | | |
| Bin Num | B1 - Bin 1 | | |

| | Sub Store | Site |
|----------------------|--------------|--------------|
| Total Received | 32.00 | 32.00 |
| Total Issued | 4.00 | 4.00 |
| Total Return | 1.00 | 1.00 |
| Total Adjustment | 2.00 | 2.00 |
| Total Balance | 31.00 | 31.00 |

Receive
Issue
Return
Adjustment
Sub-Store Transfer
Purchase Proposal

| | | | | |
|----------------|----------------------|--------------------------------------|-----------------------|-------------------------------------------|
| Date | <input type="text"/> | <input type="button" value="Clear"/> | Destination Site | Cworks Malaysia |
| Quantity | <input type="text"/> | | Destination Sub Store | Store A |
| Avg Unit Price | 18.9375 | | Remarks | <input style="width: 100%;" type="text"/> |
| Total | | | | |

| # | Date | From Site | From Store | Qty | Avg PPU | Total | To Site | To Store | Remarks |
|-------------------------|------|-----------|------------|-----|---------|-------|---------|----------|---------|
| Grand Total Cost : 0.00 | | | | | | | | | |

Figure 125: Sub Store to Sub Store Transfer Form

To transfer part from one sub store to another, the steps are as follows:

1. Go to **Material Opening Screen**.

The form contains three input fields on the left: 'Part #', 'Part Description', and 'Attribute Group'. To the right of these fields are three buttons: 'Standard Price', 'Average Price', and 'Max Level'. An ellipsis button '...' is located to the right of the 'Part #' input field.

In order to select a specific part for adjustment, click the ellipsis  button next to **Part #** input field as shown above. Consequently, the CMMS will pop-up the part listing in the panel as shown below.

The pop-up panel features a table with the following data:

| Part No | Description | Status |
|----------------|-------------------------|--------|
| d | d | Active |
| JP001 | Crock | Active |
| M199558 | Mechanical Shock Damper | Active |
| P001 | Hardened Steel Bearings | Active |
| P002 | Part 002 | Active |
| P003 | Oil Seal | Active |
| P004 | Gasket | Active |
| P007 | Jus Apple | Active |
| P090 | Bearing | Active |
| P092 | Wan | Active |

Below the table are radio buttons for 'Part No' and 'Description', and a search input field.

2. Select the **part** you want to **transfer** by clicking on a **part number** in column one above.
3. After you select the part, the CMMS will load the part details into the form as shown in **Figure 125** above.
4. Select the **Site** and the **sub store** from their respective drop-down lists. After you select the **Site** and the **sub store**, the CMMS should load the part details into the form as shown

below.

| | | | |
|------------------|------------------------|------------------|-----------|
| Part # | ECP-QP-080041-WO | Standard Price | 5512.3200 |
| Part Description | HEATER ELEMENT 10KW-WO | Average Price | 5512.3200 |
| Attribute Group | ECP | Max Level | 3.00 |
| Manufacturer | | Reorder Level | 2.00 |
| Specifications | | Reorder Quantity | 1.00 |
| UOM | PCS | Minimum Level | 1.00 |
| Status | Active | Lead Time | 0 |

| Stock Balance by Sub Store and Site | | | |
|-------------------------------------|-----------------------------|-----------|------|
| Site | Sub Store | Sub Store | Site |
| MISCELLANEOUS | STORE ENG | | |
| Bin Num | Description | | |
| | CABINET3TOP - CABINET 3 TOP | | |
| Total Received | | 0.00 | 0.00 |
| Total Issued | | 0.00 | 0.00 |
| Total Return | | 0.00 | 0.00 |
| Total Adjustment | | 1.00 | 1.00 |
| Total Balance | | 1.00 | 1.00 |

Figure 126: The sub store associated with the Part

- In order to **transfer** the part, you have to fill in the fields shown in the form below and click **Add into list**.

| Receive | Issue | Return | Adjustment | Sub-Store Transfer | Purchase Proposal | | | | |
|----------------------------------------------|----------------------|--------------------------------------|-----------------------|----------------------|-------------------|-------|---------|----------|---------|
| Date | <input type="text"/> | <input type="button" value="Clear"/> | Destination Site | Cworks Malaysia | | | | | |
| Quantity | <input type="text"/> | | Destination Sub Store | Store A | | | | | |
| Avg Unit Price | 18.9375 | | Remarks | <input type="text"/> | | | | | |
| Total | | | | | | | | | |
| <input type="button" value="Add into list"/> | | | | | | | | | |
| # | Date | From Site | From Store | Qty | Avg PPU | Total | To Site | To Store | Remarks |
| Grand Total Cost : 0.00 | | | | | | | | | |

Figure 127: Fill in the Part Details

Fill in the date using the calendar button. Fill in the quantity to transfer.

Select the **Destination Site** from a drop-down list.

Select the **Destination Sub Store** from a drop-down list. The final details of the transfer will be something as shown below.

Stock Balance by Sub Store and Site

Site: Emerson Nanjing
 Sub Store: Store AE
 Bin Num □ Description: B1 - Bin 1

| | Sub Store | Site |
|------------------|-----------|-------|
| Total Received | 32.00 | 32.00 |
| Total Issued | 4.00 | 4.00 |
| Total Return | 1.00 | 1.00 |
| Total Adjustment | 2.00 | 2.00 |
| Total Balance | 31.00 | 31.00 |

Receive Issue Return Adjustment **Sub-Store Transfer** Purchase Proposal

Date: 17 January 2011 Clear Destination Site: Cworks Malaysia
 Quantity: 2 Destination Sub Store: Store A
 Avg Unit Price: 18.9375
 Total: 37.88 Remarks:
 Add into list ▼

| # | Date | From Site | From Store | Qty | Avg PPU | Total | To Site | To Store | Remarks |
|-------------------------|------|-----------|------------|-----|---------|-------|---------|----------|---------|
| Grand Total Cost : 0.00 | | | | | | | | | |

- Commit the transfer by clicking the button **Add into list ▼**.
 The CMMS will notify you with the message below when it successfully completed the processing.



What happen if the destination sub store has not yet been properly set with parameters?

Here is what will happen. If you have not set up the destination sub store at this point, when you click the button to commit the transfer you will get the message below.



What this message means is that you have not set up the **destination sub store** parameters such as Maximum level, Min Level, Re-Order Level, Re-Order Quantity, etc. It is

asking you to set up the sub store.

Hence, when you click **Ok** on the message above, the CMMS will take you to the form below to set up the destination sub store.



Materials



New Part

General Information

Assign to Sub-Store

Suppliers

Site Cworks Malaysia ▾

Sub-Store Store A ▾

Max. Level

Min. Level

Standard Price

Location / Bin

Reorder Level

Reorder Quantity

Lead Time day(s)

Assigned Sub-Store(s)

| # | Site | Sub-Store | Bin No. | Std. Price | Max. Lvl. | Reodr. Lvl. | Reodr. Qty. | Min. Lvl. | Lead Time (days) | Options |
|---|-----------------|-----------|------------|------------|-----------|-------------|-------------|-----------|------------------|----------------------|
| 1 | Emerson Nanjing | Store AE | B1 - Bin 1 | 20.0000 | 50.00 | 25.00 | 25.00 | 15.00 | 5 | Edit |

7. Consequently, the CMMS will add the adjustment details to the list as shown below. Each row represents one adjustment.

Receive

Issue

Return

Adjustment

Sub-Store Transfer

Purchase Proposal

Date

Quantity

Avg Unit Price 18.9375

Total

Authorized Person

Remarks

| # | Date | Qty | Avg PPU | Total | Site | Sub Store | Authorized By | Remarks |
|---|-----------------|------|---------|-------|-----------------|-----------|---------------|---------|
| 1 | 17 January 2011 | 2.00 | 18.9375 | 37.88 | Emerson Nanjing | Store AE | 00-Henlen Hu | |

Grand Total Cost : 37.88

Figure 128: Received parts listing

8. Repeat the steps above if you have more transfer to make.
9. Finish.

8.13.6 How to View Purchase Proposal (REPORT)

Purchase Proposal utility generates a report for a specific spare part each time you click its tab to show when stock re-orders are due, based on your stock levels. This report is based on two conditions:

1. **Critical Purchase Proposals**

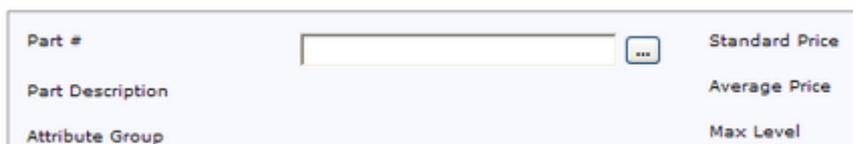
This is the condition when current **stock level** falls below the **Minimum Level**.

2. **Normal Purchase Proposals**

This is the condition when current **stock level** is at or below the **Reorder Level** but **higher** than the **Minimum Level**.

To generate the **purchase proposal** for a particular site and sub store, the steps are:

1. Go to **Material Opening Screen**.



The screenshot shows a form with three rows of input fields and buttons. The first row has 'Part #' on the left, an empty text input field in the middle, and a small blue button with three dots next to it. The second row has 'Part Description' on the left and 'Average Price' on the right. The third row has 'Attribute Group' on the left and 'Max Level' on the right.

In order to select a specific part for adjustment, click the ellipsis  button next to **Part #** input field as shown above. Consequently, the CMMS will pop-up the part listing in the panel as shown below.

| Part No | Description | Status |
|----------------|-------------------------|--------|
| d | d | Active |
| JP001 | Crock | Active |
| M199558 | Mechanical Shock Damper | Active |
| P001 | Hardened Steel Bearings | Active |
| P002 | Part 002 | Active |
| P003 | Oil Seal | Active |
| P004 | Gasket | Active |
| P007 | Jus Apple | Active |
| P090 | Bearing | Active |
| P092 | Wan | Active |

Part No
 Description

2. Select the **part** you want to **transfer** by clicking on a **part number** in column one above.
3. After you select the part, the CMMS will load the part details into the form as shown in **Figure 125** above.

- Select the **Site** and the **sub store** from their respective drop-down lists. After you select the **Site** and the **sub store**, the CMMS should load the part details into the form as shown below.

| | | | |
|------------------|-----------------------------------------------|------------------|---------|
| Part # | M199558 | Standard Price | 20.0000 |
| Part Description | Mechanical Shock Damper | Average Price | 18.9375 |
| Attribute Group | | Max Level | 50.00 |
| Manufacturer | Merlin Mechanical Shock Damper/Absorber | Reorder Level | 25.00 |
| Specifications | Able to absorb 100 Newtons Shock Impact Force | Reorder Quantity | 25.00 |
| UOM | Unit | Minimum Level | 15.00 |
| Status | Active | Lead Time | 5 |

| Stock Balance by Sub Store and Site | | |
|-------------------------------------|-------------|-------|
| Site | Sub Store | Site |
| Emerson Nanjing | Store AE | |
| Bin Num | Description | |
| B1 | Bin 1 | |
| Total Received | 32.00 | 32.00 |
| Total Issued | 8.00 | 8.00 |
| Total Return | 1.00 | 1.00 |
| Total Adjustment | 2.00 | 2.00 |
| Total Balance | 27.00 | 27.00 |

Figure 129: The Part Details loaded by CMMS after Part Selection

- To display the report click on the **Purchase Proposal** tab which will generate an output as shown below.

Receive Issue Return Adjustment Sub-Store Transfer **Purchase Proposal**

Purchase Proposal Based on Re-Order Level : Normal Priority

Page 1 of 1 **First Previous Next Last**

| Part No | Part Desc | Specification | Manufacturer | Current Balance | Reorder Level | Max Level | Advised Reorder Level | Reorder Quantity | PO Pending |
|---------|-----------|---------------|--------------|-----------------|---------------|-----------|-----------------------|------------------|------------|
| P777 | Part 777 | | | 14.00 | 20.00 | 100.00 | 86.00 | 10.00 | Yes |
| P444 | Part444 | | | 19.00 | 20.00 | 100.00 | 81.00 | 10.00 | Yes |
| P333 | Part333 | | | 14.00 | 20.00 | 100.00 | 86.00 | 10.00 | No |
| P222 | Part222 | | | 20.00 | 20.00 | 100.00 | 80.00 | 10.00 | Yes |
| P090 | Bearing | | | 14.00 | 20.00 | 100.00 | 86.00 | 10.00 | Yes |

5 records Page 1 of 1 **First Previous Next Last**

Export to Excel

Purchase Proposal Based on Minimum Level : High Priority

Page 1 of 1 **First Previous Next Last**

| Part No | Part Desc | Specification | Manufacturer | Current Balance | Reorder Level | Max Level | Advised Reorder Level | Reorder Quantity | PO Pending |
|---------|-------------------------|----------------------------------------------------------|--------------------------|-----------------|---------------|-----------|-----------------------|------------------|------------|
| P001 | Hardened Steel Bearings | Heat Tampered steel to give longer live during operation | MaxBearing International | 0.00 | 5.00 | 19.00 | 19.00 | 3.00 | Yes |
| P002 | Part 002 | | | 7.00 | 20.00 | 100.00 | 93.00 | 10.00 | Yes |
| P7899 | Part P7899 | | | 3.00 | 20.00 | 100.00 | 97.00 | 10.00 | No |
| P888 | Part 888 | | | 0.00 | 20.00 | 100.00 | 100.00 | 10.00 | No |
| JP001 | Crock | | | 6.00 | 50.00 | 200.00 | 194.00 | 10.00 | No |
| P11 | Part 11 | | | 0.00 | 20.00 | 100.00 | 100.00 | 10.00 | No |
| P12 | Part 12 | | | 0.00 | 20.00 | 100.00 | 100.00 | 10.00 | No |
| P13 | Part 13 | | | 0.00 | 20.00 | 100.00 | 100.00 | 10.00 | No |

8 records Page 1 of 1 **First Previous Next Last**

Export to Excel

- You can export the report to Excel by clicking on **Export to Excel**.
- Finish

9. PURCHASING



Purchasing

ACCESSING PURCHASING

You can access **Purchasing** on **CWorks EASY** opening screen by clicking the **icon** on the left, which will open the **Purchasing Opening Screen**.

9.1 Top-Level Purchasing Opening Screen


Welcome **Elias Ishak**
Seconds before redirect: **1193**
[Change Level](#)



Purchase Request



Purchase Order



Goods Receipt

Figure 130: Purchasing Opening Screen

From this screen, you can access three different facilities as shown by the menu icons above.

9.2 Purchase Requests

The **Purchasing Request** provides the way for you to request for spare parts or service from suppliers, vendors and contractors. Besides maintenance people, anyone can use the purchase request. First, every Purchase Request gets a review. After the review, it will receive either approval or rejection. If approved, the next step will be to generate a Purchase Order and sending the order to a supplier or a vendor.



Click the **Purchase Request icon** (above) to open **Purchase Request opening screen** complete with listing of all purchase requests. Use the **site selector drop-down list** to select another site.

9.2.1 Purchasing – Purchase Request Opening Screen

PURCHASING

 Welcome **Elias Ishak**
 Seconds before redirect: **1196**
[Change Level](#)

Purchasing
Main Menu

List
Purchase
Request

New
Purchase
Request

Site : Emerson Nanjing ▼

| # | Purchase Request No | Created Date | Required Date | Created By | Requested By | Approval Status | PO Order Status |
|---|-----------------------|------------------|------------------|-------------|--------------|-----------------|-----------------|
| 1 | PREMSNJ1000007 | 15 December 2010 | 15 December 2010 | 000 | 000 | Open | None |
| 2 | PREMSNJ1000008 | 15 December 2010 | 15 December 2010 | 000 | 00-Zoe Fang | Open | None |
| 3 | PREMSNJ1000009 | 15 December 2010 | 15 December 2010 | 000 | 000 | Open | None |
| 4 | PREMSNJ1000010 | 15 December 2010 | 15 December 2010 | 00-Zoe Fang | 000 | Open | None |
| 5 | PREMSNJ1100012 | 3 January 2011 | 3 January 2011 | 000 | William Shi | Open | None |

5 records

Search Criteria
Export to Excel
Reset
Search

Search Type
 Fix search
 Wildcard search

PR No.
...
Clear

Created Date
Clear

Required Date
Clear

Approval Status
Clear

PO Order Status
Clear

Created By
...
Clear

Requested By
...
Clear

Sort By
 PR No
 Created Date
 Required Date
 Approval Status
 PO Order Status
 Created By
 Requested By

Order
 None
 Ascending (A->Z)
 Descending (Z->A)

Export to Excel
Reset
Search

Figure 131: Purchasing – Purchase Request Opening Screen



From **Purchasing Opening Screen** of **Figure 130**, click the icon above to open **Purchasing screen** shown in **Figure 131** above. Three menu icons are provided on this screen and their function is described in the table below.

| No. | Menu Icon | Description |
|-----|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| 1. |  Purchasing Main Menu | Click to return to Purchasing Opening Screen . |
| 2. |  List Purchase Request | Click to return to Purchasing Screen . On this page you will find all the purchase Request listing. |
| 3. |  New Purchase Request | Create a New Purchase Request . |

9.2.2 How to Create a New Purchase Request

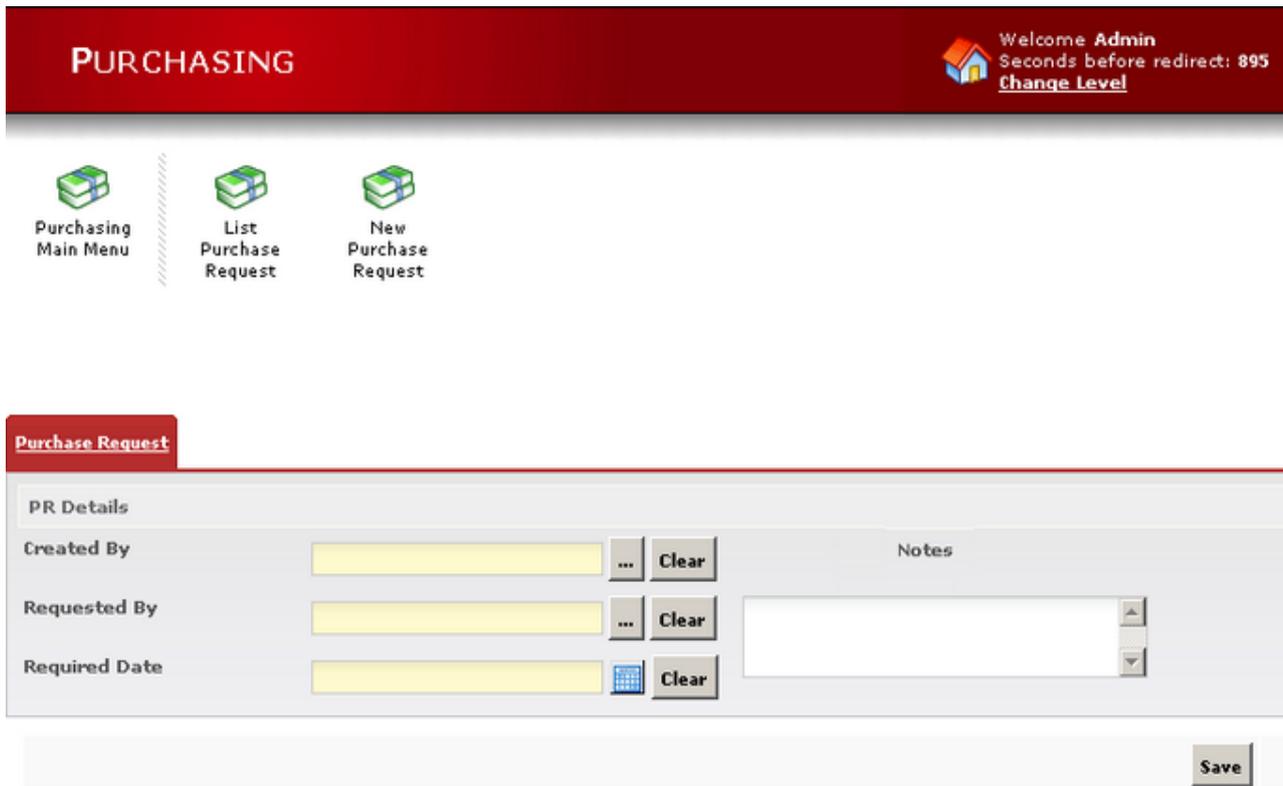


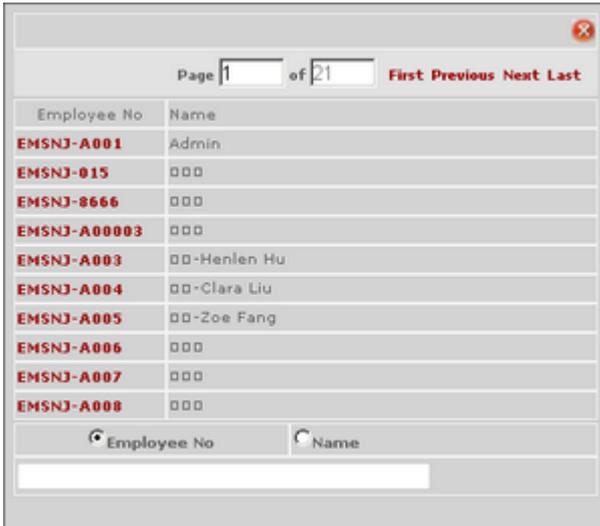
Figure 132: New Purchase Request Form

Here are the steps to create a **new purchase request**:

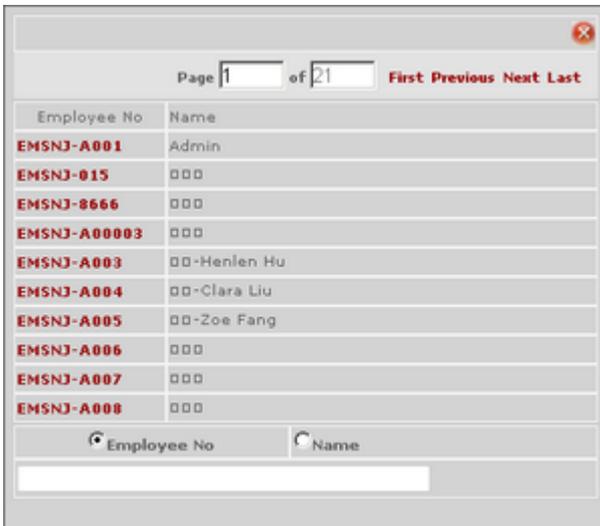
When you first opened the new **Purchase Request blank form** as in **Figure 132**, the following fields are automatically set by default as follows:



1. On the **Purchasing screen** shown in **Figure 131**, click  to open the new purchase request form shown in **Figure 132** above.
2. Fill in the **'Created By'** field with the name of an employee. You can select an employee using the ellipsis button  to pop-up a list of employee as shown below.



- Fill in the 'Requested By' field with the name of an employee. You can select an employee using the ellipsis button  to pop-up a list of employee as shown below.



- In the 'Required Date' field, click the calendar icon  and select a suitable date.
- Enter any remarks in the **Notes** field. You should have something similar to the figure below.

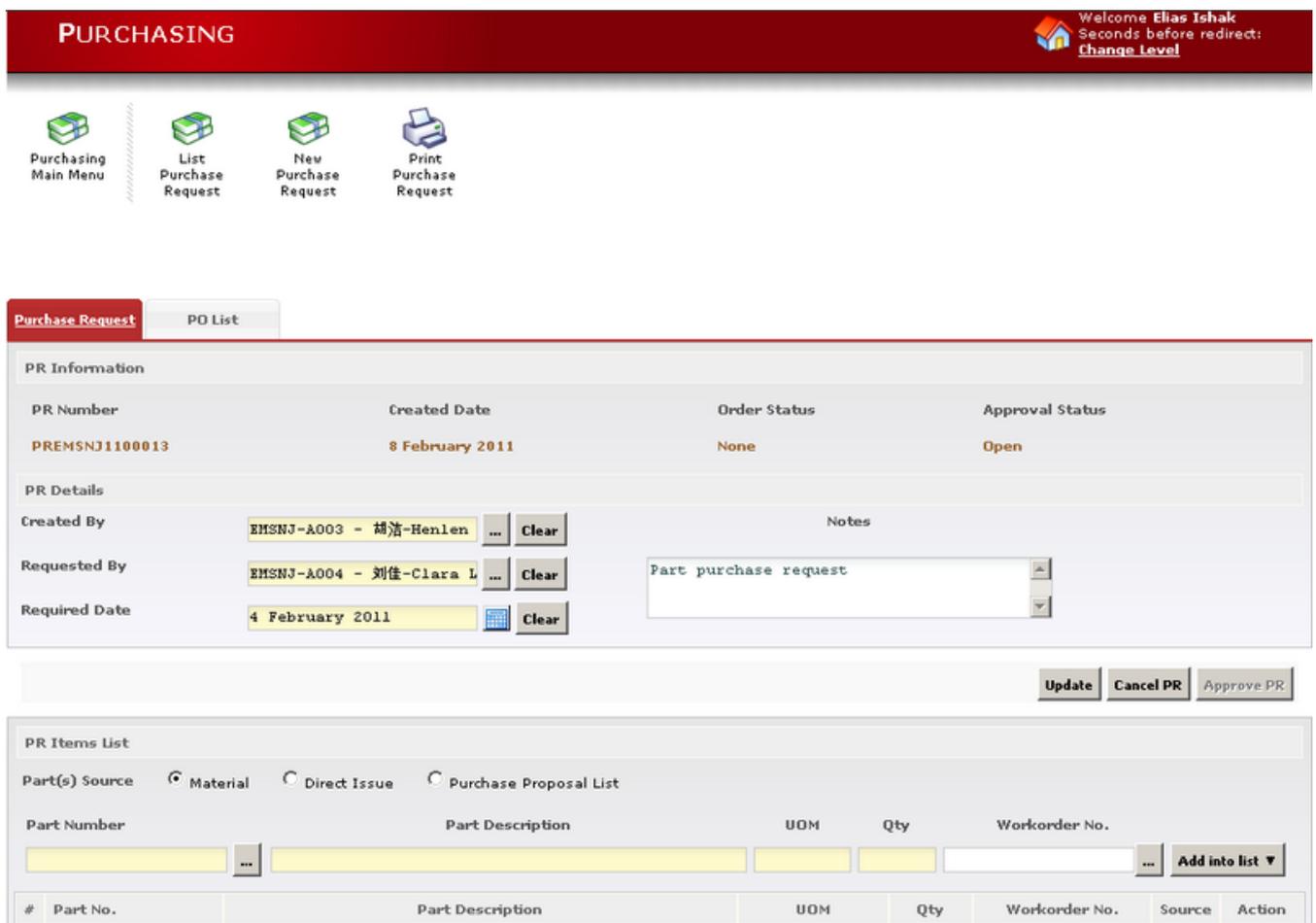


- Click  to save the record. After saving, the CMMS will reload purchase record details into the editing purchase request form. At this point, you can either continue with editing or stop here.

Note: See next section on editing existing purchase request.

- Finish.

9.2.3 How to Edit Existing Purchase Request



The screenshot displays the 'PURCHASING' module interface. At the top, there is a navigation bar with the title 'PURCHASING' and a user welcome message: 'Welcome Elias Ishak, Seconds before redirect: [Change Level](#)'. Below the navigation bar are four icons: 'Purchasing Main Menu', 'List Purchase Request', 'New Purchase Request', and 'Print Purchase Request'.

The main content area is titled 'Purchase Request' and includes a 'PD List' tab. The 'PR Information' section shows the following details:

| PR Number | Created Date | Order Status | Approval Status |
|----------------|-----------------|--------------|-----------------|
| PREMSNJ1100013 | 8 February 2011 | None | Open |

The 'PR Details' section contains the following information:

- Created By:** EMSNJ-A003 - 胡浩-Henlen (with a 'Clear' button)
- Requested By:** EMSNJ-A004 - 刘佳-Clara L (with a 'Clear' button)
- Required Date:** 4 February 2011 (with a calendar icon and a 'Clear' button)
- Notes:** Part purchase request

At the bottom right of the 'PR Details' section, there are three buttons: 'Update', 'Cancel PR', and 'Approve PR'.

The 'PR Items List' section at the bottom features a 'Part(s) Source' dropdown menu with options for 'Material', 'Direct Issue', and 'Purchase Proposal List'. Below this is a table for adding items to the list:

| Part Number | Part Description | UOM | Qty | Workorder No. | Action |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------------------------------|
| <input type="text"/> | <input type="button" value="Add into list"/> |

Below the table is a summary table with columns: #, Part No., Part Description, UOM, Qty, Workorder No., Source, and Action.

Figure 133: Modifying Existing Purchase Request

Here are the steps to open existing purchase request for editing:

1. From the **purchase request listing** on **Purchasing screen** shown in **Figure 131**, select a purchase request you would like to open for modification by clicking on the **purchase request number**. The CMMS will load the details of this purchase request into the editing form as shown in **Figure 133** above.

2. If for some reasons you want to **cancel this Purchase request**, click . The CMMS will prompt you for verification of your user authentication as shown below.



Please verify your identity to proceed.

User Name: Password:

3. You can edit any of the details of the purchase request shown below accordingly.



PR Details

| | | | |
|---------------|-------------------------|-----|-------|
| Created By | EMSNJ-A003 - 胡洁-Henlen | ... | Clear |
| Requested By | EMSNJ-A004 - 刘佳-Clara L | ... | Clear |
| Required Date | 4 February 2011 | | Clear |

Notes

Part purchase request. Prepared on Feb 8, 2011.

4. Click  to save any changes you have made.
5. Next, before you can select the parts to add to the purchase request, you must select the **part source** from the field shown below.



Part(s) Source Material Direct Issue Purchase Proposal List

As you can see there are **three options** available.

If you select the **Material option**, then proceed to **step 6**, which describes this selection steps well.

Alternatively, if you select **Direct Issue option**, then proceed to step 12.

Alternatively, if you select **Purchase Proposal List option**, then proceed to step 12

Regardless of which of the above option you select, you will need to use the ellipsis button to pop-up a listing of work orders, from which you need to select one to tied up with this purchase request.

6. If you select the **Material option**, then continue here.

To select the part, now click the **ellipsis button** . This will immediately pop-up part listing.

From this pop-up listing, you can pick a Part Number to add to the Purchase Request and the CMMS will automatically fill in the **Part Number**, **Part Description** and **UOM** details into the appropriate fields as shown below.

| Part Number | Part Description |
|-------------|------------------|
| B555 | Part B555 |

7. Enter the quantity in **Qty** fields shown below.

| UOM | Qty | Workorder No. |
|-----|-----|---------------|
| | | |

8. In order to select a **work order**, click the ellipsis button  next to **Workorder No. field** (shown above in step 7) to pop-up a listing of **work orders**. Next, select a work order by clicking on the **work order number** you want.

9. Save the part into the list provided by clicking .

10. Repeat step (4) to (8) until you have specified all the parts.

11. Finish.

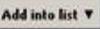
12. For **Direct Issue Option** continue here.



PR Items List

Part(s) Source: Material **Direct Issue** Purchase Proposal List

Part Number: Part Description: UOM: Qty: Workorder No.:

Item to be supplied by external source supplier | UOM: EG | Qty: 2 | Workorder No.: | 

| # | Part No. | Part Description | UOM | Qty | Workorder No. | Source | Action |
|---|----------|------------------|-----|-----|---------------|--------|--------|
|---|----------|------------------|-----|-----|---------------|--------|--------|

Alternatively, if you select **Direct Issue** option as shown above, then you need to fill in the **Part Description**, **UOM**, **Qty** manually, as this is a special case where you have to source the part(s) from outside your company.

You also need to select a work order to fill in the **Workorder No. field** above. In order to do this, click the ellipsis button  next to **Workorder No. field** to pop-up a listing of **work orders**. Next, select a work order by clicking on the **work order number** you want.

13. Save the part into the list provided by clicking .

14. Repeat step (12) to (13) until you have specified all the parts.

15. Finish.

16. For **Purchase Proposal List Option** continue here.

Finally, if you select **Purchase Proposal List option**, it will immediate pop-up the purchase proposal form as shown below. In this form, you can specify and add all the parts you want to the proposal form.

The screenshot shows a web browser window titled "CWORKS - Careworks - Windows Internet Explorer". The address bar shows the URL: `http://192.168.0.34/careworks/modules/po/pr_po_list.php?prno=PREMSNJ11000138&sitecode=EMSNJ`. The form has two main sections:

- Top Section:** "Purchase Proposal Based on Re-Order Level : Normal Priority". It includes a "Sub Store" dropdown, a "Reorder Level to be selected" dropdown set to "Advised", and a table with 11 columns: Part No, Part Desc, Specification, Manufacturer, Current Balance, Reorder Level, Max Level, Advised Reorder Level, Specified Reorder Level, and Select. Below the table is a "records" field and pagination controls: "Page 1 of 1" and "First Previous Next Last".
- Bottom Section:** "Purchase Proposal Based on Minimum Level : High Priority". It has an identical layout to the top section, including a table with 11 columns and pagination controls.

17. You also need to select a work order to fill in the **Workorder No. field** above. In order to do

this, click the ellipsis button  next to **Workorder No. field** to pop-up a listing of **work orders**. Next, select a work order by clicking on the **work order number** you want.

18. Finish.

If you click the **PO List tab**, all the **Purchase Orders** connected with this **Purchase Request** will be listed here, if they exist. This list as shown in **Figure 134** below is empty as no Purchase Orders has been connected to this Purchase Request yet.

The following subsections provide further descriptions of processing which are related to **Purchase Request form**.



Figure 134: PO List Tab – It will list any parts Order Associated with this Purchase Request

9.2.3.1 How to Print the Purchase Order



You can print the current purchase order form opened for editing by clicking the print icon above and the CMMS will pop-up the printable output as shown below.

PURCHASE REQUISITION

Request No : PREMSNJ1100013

Approval Status : Open

Request By : DD-Clara Liu

Date Created : 8 February 2011

Created By : DD-Henlen Hu

Date Required : 4 February 2011

LIST OF ITEM(S) TO ORDER :

| # | Part No | Part Description | UOM | Quantity | Workorder No |
|---|---------|------------------|-----|----------|---------------|
| 1 | B555 | Part B555 | s | 4.00 | EMSNJ10001868 |

AUTHORISED BY :

.....
 Date.....

SIGNATURE

9.2.3.2 How to Approve or Cancel a Purchase Order or Delete Requested Parts

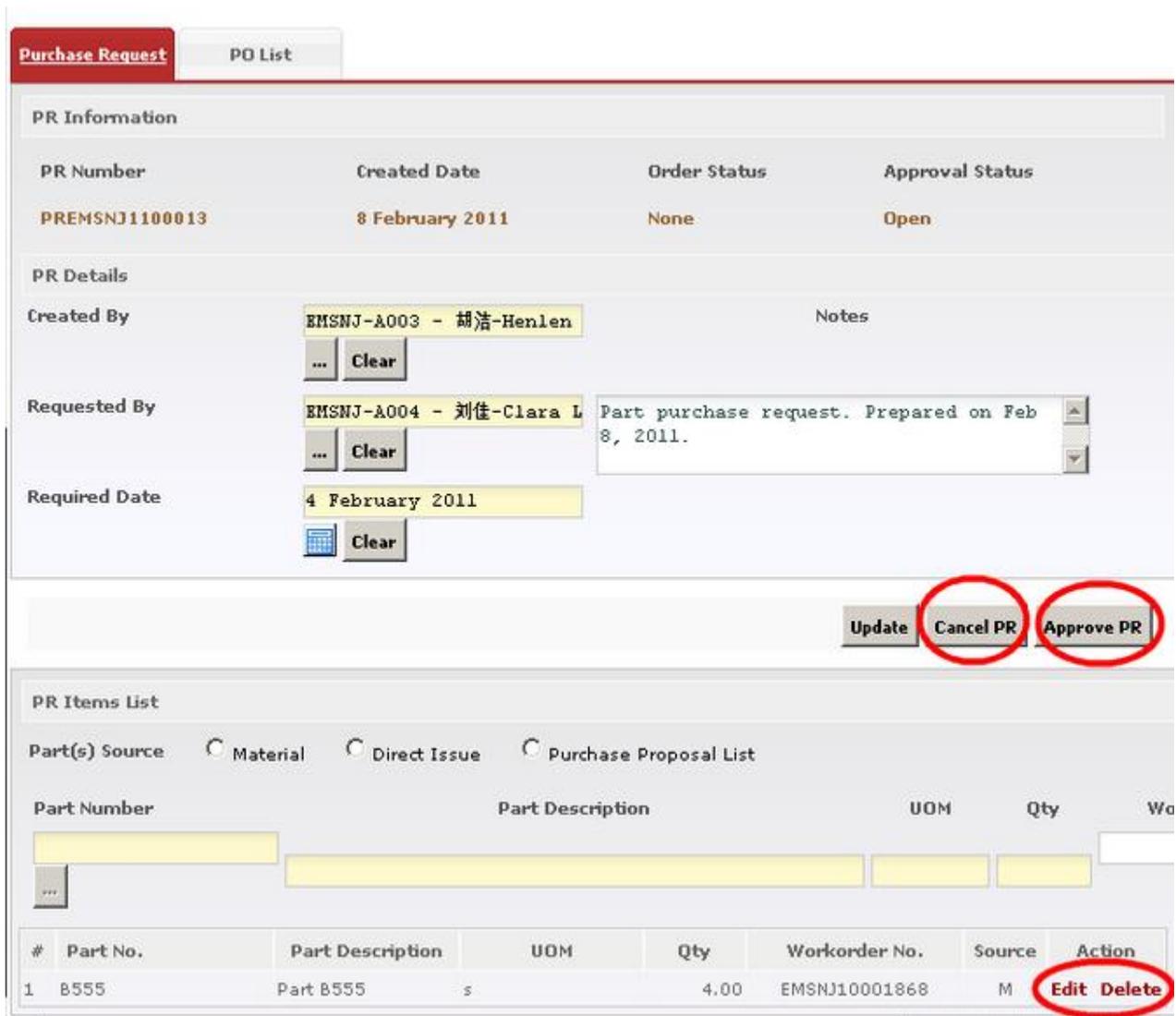


Figure 135: Approval and Cancellation Buttons on a Purchase Order opened for Editing

On the figure above, you can cancel this purchase order by clicking the **Approval PR button**. To cancel, you can click the **Cancel PR button**. In addition, you can edit the part request on the list via the **Edit link** as shown above. The **Delete link** will delete the part from the list.

9.3 Purchase Order



Click the **Purchase Order icon** (above) to open **Purchase Order opening screen** complete with listing of all purchase orders. Use the **site selector drop-down list** to select another site.

The Purchase Order provides the way for placing orders for spare parts or a service from any suppliers, vendors and contractors.



If you see the above message, it means you have not set you base currency yet. You should do that first to avoid complications.

9.3.1 Purchasing – Purchase Order Opening Screen

PURCHASING

 Welcome Admin
 Seconds before redirect: 895
[Change Level](#)

Purchasing
Main Menu

List
Purchase Order

New
Purchase Order

Site : Emerson Nanjing

| # | Purchase Order No | Supplier | Currency | Order Amount | Order Date | Order Status | Expected Delivery | Delivery Status |
|---|-------------------|-------------------------------|----------|--------------|------------------|----------------|-------------------|-----------------|
| 1 | POEMSNJ1000006 | Muhamad Canvas Supplier | MYR | 426.88 | 1 December 2010 | Not Authorised | 16 December 2010 | No Delivery |
| 2 | POEMSNJ1000007 | Muhamad Canvas Supplier | USD | 2259.16 | 1 December 2010 | Not Authorised | 9 December 2010 | No Delivery |
| 3 | POEMSNJ1000008 | JT International Berhad-10000 | MYR | 1317.00 | 15 December 2010 | Not Authorised | 15 December 2010 | No Delivery |
| 4 | POEMSNJ1000009 | Gamuda Berhad | MYR | 143.00 | 23 December 2010 | Not Authorised | 24 December 2010 | No Delivery |
| 5 | POEMSNJ1000011 | Gamuda Berhad | MYR | 121.00 | 23 December 2010 | Not Authorised | 30 December 2010 | No Delivery |
| 6 | POEMSNJ1100016 | JT International Berhad-10000 | | 0.00 | 3 January 2011 | Not Authorised | 11 January 2011 | No Delivery |
| 7 | POEMSNJ1100017 | Gamuda Berhad | | 0.00 | 3 January 2011 | Not Authorised | 4 January 2011 | No Delivery |

7 records
Page 1 of 1 [First](#) [Previous](#) [Next](#) [Last](#)

Search Criteria

PO No.

...

PO Order Status
Not Authorised
▼

Cost Center

▼

Order Date

From

To

Expected Delivery Date

From

To

Ordered By

...

Delivery Status

▼

Export to Excel
Print POs (Base currency)
Print POs (Selected currency)
Reset
Search

Figure 136: Purchase Order Opening

Figure 136 shows **Purchase Order opening** where you will find the listing of all *Purchase Orders*. Here you will find three menu icons and the table below describes their respective functions. For finding a specific or a group of Purchase Orders, you will find a fairly comprehensive search facility provided at the bottom of the opening screen.



| No. | Menu Icon | Description |
|-----|--------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| 1. |  Purchasing Main Menu | Click to return to Purchasing Opening Screen . |
| 2. |  List Purchase Order | Click to return to Purchase Order Listing Screen . On this page you will find all the Purchase Orders listing. |
| 3. |  New Purchase Order | Create a New Purchase Order . |

9.3.2 How to Create (Raise) a New Purchase Order

The screenshot shows the 'PURCHASING' section of the software. At the top right, it says 'Welcome Admin' and 'Seconds before redirect: 895'. Below this are three icons: 'Purchasing Main Menu', 'List Purchase Order', and 'New Purchase Order'. The 'New Purchase Order' icon is selected. Below the icons, it says 'Site : Emerson Nanjing'. The main form is titled 'Purchase Order' and 'PO Details'. It contains several input fields and dropdown menus. On the right side, there are two large text areas labeled 'Deliver To' and 'Remarks'. A 'Save' button is at the bottom right.

Figure 137: New Purchase Order Entry Form

| PURCHASE ORDER DETAILS OR FIELDS | | |
|----------------------------------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Field | Description |
| 1 | Ordered By | Pick a name from a pop-up list of the names who placed the order for the items or services |
| 2 | Invoice To | Pick a name from a pop-up list of the authorized person to whom the invoice will be sent with the delivery. The authorization can be granted by the administrator to an employee in the Administration Menu section. |
| 3 | Supplier | Pick a supplier from a pop-up list of suppliers (a list of suppliers is set up in Material Menu section) |
| 4 | Quotation Date | Click the calendar icon to pick a date of the quotation from vendor |

| | | |
|----|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| 5 | Quotation Reference | quotation Number from vendor |
| 6 | Term of Sale  | Pick from a drop down list. Sales terms and conditions. |
| 7 | Shipped Via  | Pick from a drop down list. Methods of shipment – depends on what you predefined in the Material Menu section. |
| 8 | Payment Terms  | Pick from a drop down list. To identify the payment term of vendor. The payment term can be defined in Masters. |
| 9 | Date Ordered  | The date on which the goods are ordered |
| 10 | Expected Delivery  | The date on which the goods are expected to be delivered |
| 11 | Cost Center  | Pick from a drop down list |
| 12 | Account Code  | Select from a drop down list |
| 13 | Currency  | Select from a drop down list |
| 14 | Rate | (Read only) The currency base rate set up in the CMMS database by client/user |
| 15 | Deliver To | Delivery address for the ordered parts |
| 16 | Remarks | Enter any notes or remarks regarding the order here |
| 17 |  | Save and create the new PO record with a new PO Number |

Here are the steps to create a **new Purchase Order**,



1. From **Figure 136** of the **Purchase Order opening screen**, click

to open the new purchase order form of **Figure 137** above.

- Fill in all the fields as shown below.

Site : Emerson Nanjing

Purchase Order

PO Details

| | | | |
|--------------------------------------------|--------------------------------------------------|----------------------------------------------------|------------------------------------|
| Ordered By EMSNJ-A25 - Alice Wu ... X | Term Of Sale CREDIT | Cost Center C01 - account ... X | Account Code ACC1 - Admin ... X |
| Invoice To J001 - Jiva ... X | Shipped Via ROAD | Currency MYR - 1.0000 ... X | |
| Supplier S15 - Johnsons Intellige ... X | Payment Terms 10 Days | Deliver To Shipping address: Emerson Nanjing | |
| Quotation Date 7 February 2011 ... X | Date Ordered 7 February 2011 ... X | Remarks | |
| Quotation Reference Not Available | Expected Delivery Date 16 February 2011 ... X | | |

Save

- Click the save button Save when you finish. The CMMS will immediately assign a new **PO Number** and create PO record. It will now open the record in the **PO editing form** shown below.

Purchase Order

PO Information

| PO Number | Created Date | Order Status | Delivery Status | Base Currency |
|----------------|------------------|----------------|-----------------|---------------|
| POEMSNJ1100019 | 24 February 2011 | Not Authorised | No Delivery | MYR |

PO Details

| | | | |
|-----------------------------------------------------|-----------------------------------------------------|--------------------------------------------------------------------------|--------------------------------------------|
| Ordered By EMSNJ-FHIS-01 - Allen Ta ... X | Term Of Sale CREDIT | Cost Center C01 - account ... X | Account Code ACC2 - CODE21 ... X |
| Invoice To Sarif - Sarif ... X | Shipped Via ROAD | Currency MYR-1.0000 ... X | |
| Supplier S15 - Johnsons Intellige ... X | Payment Terms 30 Days | Deliver To Concurrent Technologix. Kuala Lumpur Malaysia | |
| Quotation Date 22 February 2011 ... X | Date Ordered 22 February 2011 ... X | Remarks | |
| Quotation Reference [Empty] | Expected Delivery Date 2 March 2011 ... X | | |

PO Items List

Source: Material (M) Direct Issue (D) Purchase Proposal List (P) Purchase Request List

| Part # | Part Description | UoM | Qty | Workorder # |
|---------|------------------|---------|---------|-------------|
| [Empty] | [Empty] | [Empty] | [Empty] | [Empty] |

| Unit Price | Discount % | Tax % | Line Cost | Base Cost (MYR) |
|------------|------------|---------|-----------|-----------------|
| [Empty] | [Empty] | [Empty] | [Empty] | [Empty] |

| # | Part No. | Part Description | UOM | Qty | Unit Price | Discount % | Tax % | Line Cost | Base Cost | PR No. | Requested By | Workorder No. | Source | Action | | | | | | | | | | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------------|-----|-----|------------|------------|-------|-----------|-----------|--------|--------------|---------------|--------|--------|---------------|--------|----------------|-------------|---------------|-------------|-----------------------|------|-------|-------------|------------------------|--------|-----------------------------|--------|
| <table style="width: 100%; margin-top: 10px;"> <tr> <td>Cost in (MYR)</td> <td style="text-align: right;">0.0000</td> </tr> <tr> <td>Discount (MYR)</td> <td style="text-align: right;">0.00 0.0000</td> </tr> <tr> <td>G.S.T % (MYR)</td> <td style="text-align: right;">0.00 0.0000</td> </tr> <tr> <td>Freight Charges (MYR)</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Tax %</td> <td style="text-align: right;">0.00 0.0000</td> </tr> <tr> <td>Grand Total Cost (MYR)</td> <td style="text-align: right;">0.0000</td> </tr> <tr> <td>Grand Total Base Cost (MYR)</td> <td style="text-align: right;">0.0000</td> </tr> </table> | | | | | | | | | | | | | | | Cost in (MYR) | 0.0000 | Discount (MYR) | 0.00 0.0000 | G.S.T % (MYR) | 0.00 0.0000 | Freight Charges (MYR) | 0.00 | Tax % | 0.00 0.0000 | Grand Total Cost (MYR) | 0.0000 | Grand Total Base Cost (MYR) | 0.0000 |
| Cost in (MYR) | 0.0000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Discount (MYR) | 0.00 0.0000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| G.S.T % (MYR) | 0.00 0.0000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Freight Charges (MYR) | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tax % | 0.00 0.0000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Grand Total Cost (MYR) | 0.0000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Grand Total Base Cost (MYR) | 0.0000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |

4. Now you can either continue adding parts you want to order or stop.
Please see the next section on how to add parts.
5. Finish.

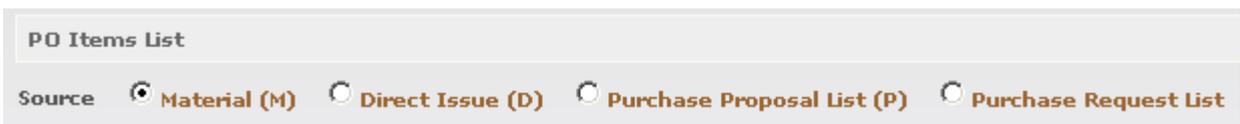
| PURCHASE SUMMARY INFORMATION | | |
|------------------------------|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Field | Description |
| 1 | Cost in (USD) | Sum Total in cost |
| 2 | Discount (USD) | Total discount in US dollar |
| 3 | G.S.T% (USD) | Gross Sales Tax (GST) percentage This is a preset value that is set in the " Masters - Misc ". However, you can override this preset value by entering a new input value. |
| 4 | Freight Charges (USD) | Transport cost for the item |
| 5 | Tax % | How many % tax you have to pay |
| 6 | Grand Total Line Cost (USD) | Grand Total Line Cost in US dollars for line items |
| 7 | Grand Total Base Cost (USD) | Grand Total Base Cost in US dollars (Gross) |
| 8 | <input type="button" value="Save"/> | Save Purchase Order form to a new record in the database |

9.3.3 How to Modify Existing Purchase Order

Figure 138: Modify/Edit Existing Purchase Order

Here are the steps to open and edit an existing **Purchase Order**,

1. From the purchase order listing on the **Purchase Order opening screen** of **Figure 136**, select and open an existing purchase order (click on the purchase order number in the listing) as shown in **Figure 138** above.
2. Edit any of the **purchase order details** accordingly.
3. Click  to save the changes.
4. Select the **Source** from the **options** shown below to indicate where the part belongs to.



where:

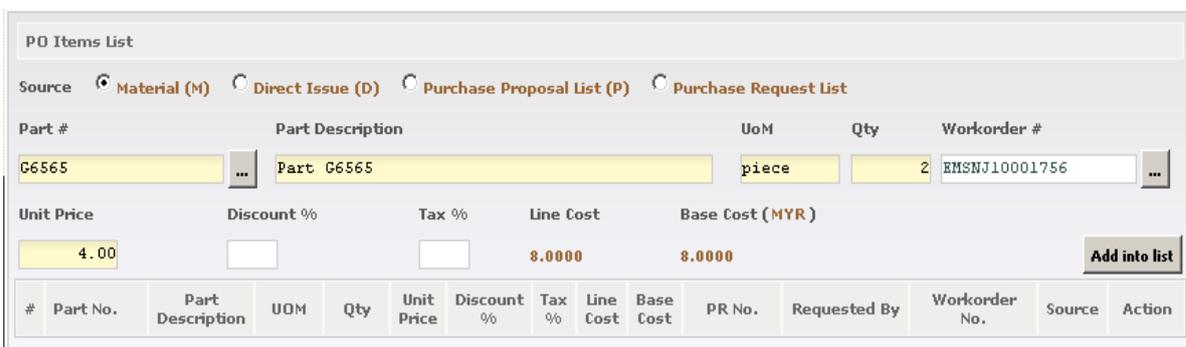
Material (M)is standard stock item that can be found in material store

Direct Issue(D) is sourced from outside on ad hoc basis

Purchase Proposal List(P) is listed in the Purchase Proposal

Purchase Request List is listed in the Purchase Request

5. Enter the **parts** to purchase by filling in the fields according to each type of source. For instance, the diagram below is for **source** type **Material(M)**.



| # | Part No. | Part Description | UoM | Qty | Unit Price | Discount % | Tax % | Line Cost | Base Cost | PR No. | Requested By | Workorder No. | Source | Action |
|---|----------|------------------|-------|-----|------------|------------|-------|-----------|-----------|--------|--------------|---------------|--------|--------|
| | G6565 | Part G6565 | piece | 2 | 4.00 | | | 8.0000 | 8.0000 | | | EMSNJ10001756 | | |

If source type is Direct Issue(D), you will need to fill in the part detail in the description field manually.

6. Select the work order via the ellipsis button.
7. Click  to add the part into part listing on the form as shown below. Notice that the cost fields also changed accordingly.

PD Items List

Source Material (M) Direct Issue (D) Purchase Proposal List (P) Purchase Request List

Part # Part Description UoM Qty Workorder #

Unit Price Discount % Tax % Line Cost Base Cost (MYR)

| # | Part No. | Part Description | UOM | Qty | Unit Price | Discount % | Tax % | Line Cost | Base Cost | PR No. | Requested By | Workorder No. | Source | Action |
|---|----------|------------------|-------|------|------------|------------|-------|-----------|-----------|--------|--------------|---------------|--------|---------------------------------------------|
| 1 | G6565 | Part G6565 | piece | 2.00 | 4.0000 | 0.00 | 0.00 | 8.0000 | 8.0000 | | | EMSNJ10001756 | M | Edit Delete |

Cost in (MYR)

Discount (MYR)

G.S.T % (MYR)

Freight Charges (MYR)

Tax %

Grand Total Cost (MYR)

Grand Total Base Cost (MYR)

8. Repeat adding parts as required.
9. Finish.

9.3.4 How to Cancel Purchase Orders

To cancel a purchase order, first open the purchase order in the modification/editing form as shown in **Figure 138** above. Next, click .

The CMMS will prompt you to verify your id before you can complete the process of cancellation, as shown below.

Please verify your identity to proceed.

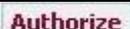
User Name: Password:

9.3.5 How to Authorize a Purchase Order

You can authorize a purchase order if you have the right privilege.

To authorize a Purchase Order click  .

Description of fields:

| Fields | Description |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name | To select the authorizer's number, click the  button to get a list. |
| Password | Enter password. |
|  | Click the respective button to clear any of the fields. |
|  | Authorize PO |

9.3.6 How to Print Purchase Orders

To print a purchase order, first open the purchase order in the modification/editing form as shown in **Figure 138** above. Then, click either one of the **print icons** below.



The first three options on the menu for this screen have already been explained in section 9.3.1. The two extra menus are related to the printing options for the existing Purchase Order. These options are:

1. **Print PO with Base Currency**

In this option, the cost in the PO will be automatically converted to the Base Currency using the conversion rate also provided in the form. This will allow material to be purchased in a country other than the destination country for the material purchased.

2. **Print PO without Base Currency**

In this option, the cost in the PO will **NOT** be converted to the Base Currency.

9.4 Goods Receipt



Click the **Goods Receipt icon** (above) to open **Goods Receipt opening screen** as shown in **Figure 139** complete with listing of purchase orders corresponding to goods received. Use the **site selector drop-down list** to select another site.

9.4.1 Good Receipt Opening Screen

PURCHASING

 Welcome Admin
 Seconds before redirect: 895
[Change Level](#)

Purchasing Main Menu

Site: Emerson Nanjing ▼

| # | PO# | Order Date | SAP PO# | SAP Date | GRN# | Supplier Name | Currency | Delivery Status |
|---|----------------|------------------|---------|----------|-----------------|-------------------|----------|------------------|
| 1 | POEMSNJ1000003 | 8 December 2010 | | | GRNEMSNJ1000001 | Craft Metal Works | MYR | Partial Delivery |
| 2 | POEMSNJ1000004 | 8 December 2010 | | | GRNEMSNJ1000003 | Craft Metal Works | MYR | Partial Delivery |
| 3 | POEMSNJ1000012 | 23 December 2010 | | | | Gamuda Berhad | MYR | No Delivery |
| 4 | POEMSNJ1000013 | 23 December 2010 | | | | Omega Enterprise | MYR | No Delivery |
| 5 | POEMSNJ1000014 | 23 December 2010 | | | | Gamuda Berhad | MYR | No Delivery |

5 records
Page 1 of 1 [First](#) [Previous](#) [Next](#) [Last](#)

Search Criteria

[Export to Excel](#)
[Transaction](#)
[Reset](#)
[Search](#)

PO No. ... [Clear](#)

Cost Center ▼ [Clear](#)

Supplier Name ... [Clear](#)

Received Date From [Clear](#) To [Clear](#)

Delivery Status No Delivery, Partial Delivery ▼ [Clear](#)

GRN No. ... [Clear](#)

[Export to Excel](#)
[Transaction](#)
[Reset](#)
[Search](#)

**Figure 139: Goods Receipt Opening Screen - Lists all
Purchase Orders for Goods Receipts**

Notice that there is only one menu icon on this screen and it is for returning to **top-level Purchasing Order Opening Screen**.

9.4.2 How to Process Goods Receipt

There are two types of processing of received goods that you can handle with this form:

1. Partial delivery
2. Full delivery

PURCHASING Welcome Admin
Seconds before redirect: 895
[Change Level](#)



Goods Received Information PO Transactions List

GRN Information

| | | | | | |
|------------|--------------|--|--|--|--|
| GRN Number | Created Date | | | | |
| | | | | | |

PO Information

| | | | | | |
|----------------|---------------|------------------|--------------|-----------------|---------------|
| PO Number | SAP PO Number | Created Date | Order Status | Delivery Status | Base Currency |
| POEMSNJ1000014 | | 23 December 2010 | Authorised | No Delivery | MYR |

PO Details

| | | | |
|-----------------------|--------------------|--|--|
| Ordered By | Invoice To | | |
| EMSNJ-A017 - Alina Ma | EMSNJ-A001 - Admin | | |
| Supplier | | | |
| S006 - Gamuda Berhad | | | |

| | | | |
|------------------------|---------------|--------------|----------|
| Quotation Date | Term Of Sale | Cost Center | Currency |
| 23 December 2010 | | account | MYR |
| Date Ordered | Shipped Via | Account Code | Rate |
| 23 December 2010 | | Admin | 1.0000 |
| Expected Delivery Date | Payment Terms | | |
| 30 December 2010 | | | |
| Quotation Reference | Deliver To | Remarks | |
| | | | |

PO Items List

| # | Part No. | Part Description | UOM | Qty | Unit Price | Discount % | Tax % | Line Cost | Base Cost | PR No. | Requested By | Workorder No. | Source |
|---|----------|------------------|-----|-------|------------|------------|-------|-----------|-----------|--------|--------------|---------------|--------|
| 1 | P002 | Part 002 | s | 12.00 | 11.0000 | 0.00 | 0.00 | 132.0000 | 132.0000 | | | | M |

All Summary Item Summary **Receive All** Receive Item Cancel Item

| | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Last Recv.Date</p> <p>Total Order Qty 12.00</p> <p>Total Received 0.00</p> <p>Total Cancelled 0.00</p> <p>Total Balance 12.00</p> | <p>Received Date <input type="text"/> <input type="button" value="Clear"/></p> <p>Supplier Invoice No <input type="text"/></p> <p>Invoice Date <input type="text"/> <input type="button" value="Clear"/></p> <p>Delivery Order No <input type="text"/></p> <p>Sub-Store <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Receive All Items"/></p> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Figure 140: Goods Receipt Processing Screen

| No. | Menu Icon | Description |
|-----|-----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| 1. |  Purchasing Main Menu | Click to return to Purchasing Opening Screen . |
| 2. |  Goods Received List | Click to return you to the Goods Receipt opening screen where you can find the purchase order listing. |

9.4.3 How to Process Partial Delivery of Goods

PO Items List

| # | Part No. | Part Description | UOM | Qty | Unit Price | Discount % | Tax % | Line Cost | Base Cost | PR No. | Requested By | Workorder No. | Source |
|---|----------|------------------|-----|-------|------------|------------|-------|-----------|-----------|--------|--------------|---------------|--------|
| 1 | P002 | Part 002 | s | 12.00 | 11.0000 | 0.00 | 0.00 | 132.0000 | 132.0000 | | | | M |

All Summary **Item Summary**

Item Name:

Last Recv.Date:

Total Order Qty: 12.00

Total Received: 0.00

Total Cancelled: 0.00

Total Balance: 12.00

Receive All **Receive Item** Cancel Item

Items:

Received Qty:

Received Date:

Supplier Invoice No:

Invoice date:

DO No:

Sub Store:

Figure 141: Processing Partial Delivery of Goods

Here are the steps to process goods receipt for **Partial delivery**:

1. From **purchase order listing** on **Goods Receipt Opening Screen** of **Figure 139**, select purchase order by clicking on the **purchase order number**. This will open the purchase

order for processing good receipt as shown in **Figure 140** of **Goods Receipt Processing Screen** above.

2. Click **Goods Received Information** tab.
3. Referring to **Figure 141**, click **Item Summary** tab to begin partial delivery processing.
4. Using **Item Name** drop-down list, select the **item part number** to process. This will display the summary on the order. If there was a partial delivery previously, it will show up in the **Last Recv. Date**.
5. Click **Receive Item** tab. Using **Item Name** drop-down list, select the **item part number** to process.
6. Enter total items delivered (a partial delivery of 6 in this case) into the **Received Qty** field.
7. Fill in the relevant fields – **dates, Invoice, DO, and sub-store**.
8. Click button **Receive This Item**. This will update the details as shown below.

9. For summary of the PO transaction, click **PO Transactions List** tab to display the details below.

| # | Part Number | Description | Status | Qty | Unit Price | Date Received | DD No | Invoice No | Invoice Date |
|---|-------------|-------------|----------|------|------------|-----------------------|-------|------------|-----------------------|
| 1 | P002 | Part 002 | Received | 6.00 | 11.00 | 7 February 2011 00:00 | 73290 | JPINV-3222 | 7 February 2011 00:00 |

On the **Goods Receipt Opening Screen** of **Figure 139**, you will see PO information

amended as shown below.

Site: Emerson Nanjing

| # | PO# | Order Date | SAP PO# | SAP Date | GRN# | Supplier Name | Currency | Delivery Status |
|---|----------------|------------------|---------|----------|-----------------|-------------------|----------|------------------|
| 1 | POEMSNJ1000003 | 8 December 2010 | | | GRNEMSNJ1000001 | Craft Metal Works | MYR | Partial Delivery |
| 2 | POEMSNJ1000004 | 8 December 2010 | | | GRNEMSNJ1000003 | Craft Metal Works | MYR | Partial Delivery |
| 3 | POEMSNJ1000012 | 23 December 2010 | | | | Gamuda Berhad | MYR | No Delivery |
| 4 | POEMSNJ1000013 | 23 December 2010 | | | | Omega Enterprise | MYR | No Delivery |
| 5 | POEMSNJ1000014 | 23 December 2010 | | | GRNEMSNJ1100001 | Gamuda Berhad | MYR | Partial Delivery |

5 records

10. Finish.

9.4.4 How to Process Full Delivery of Goods

PO Items List

| # | Part No. | Part Description | UDM | Qty | Unit Price | Discount % | Tax % | Line Cost | Base Cost | PR No. | Requested By | Workorder No. | Source |
|---|----------|------------------|-----|------|------------|------------|-------|-----------|-----------|--------|--------------|---------------|--------|
| 1 | P111 | Part111 | d | 1.00 | 11.0000 | 0.00 | 0.00 | 11.0000 | 11.0000 | | | | M |

| | |
|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Last Recv.Date Total Order Qty 1.00 Total Received 0.00 Total Cancelled 0.00 Total Balance 1.00 | Received Date: 8 February 2011 <input type="button" value="Clear"/> Supplier Invoice No: INV-10 Invoice Date: 8 February 2011 <input type="button" value="Clear"/> Delivery Order No: 5498 Sub-Store: Material Store B |
|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Figure 142: Processing Full Delivery of Goods

Here are the steps to process goods receipt for **Full delivery**:

1. From **purchase order listing** on **Goods Receipt Opening Screen** of **Figure 139**, select purchase order by clicking on the **purchase order number**. This will open the purchase order for processing good receipt as shown in **Figure 140** of **Goods Receipt Processing Screen** above.
2. Click **Goods Received Information** tab.
3. On the form as shown in **Figure 142** above, select **Receive All Tab**.
4. On the summary form (on the left), Click **All Summary** to view summary detail on this goods. If there was a partial delivery before, it will show up on the summary.
5. Click **Receive All** on the right for entering received goods.
6. Fill in the date fields, Invoice, DO, sub-store, etc.
7. Click button below **Receive All Items**.
8. Click **PO Transactions List** tab to see the listing of completed transaction including this one.
9. Finish.

9.4.5 How to Cancel Goods on Purchase Order

| PO Items List | | | | | | | | | | | | | |
|---------------|----------|------------------|-----|------|------------|------------|-------|-----------|-----------|--------|--------------|---------------|--------|
| # | Part No. | Part Description | UOM | Qty | Unit Price | Discount % | Tax % | Line Cost | Base Cost | PR No. | Requested By | Workorder No. | Source |
| 1 | P003 | Oil Seal | Pcs | 1.00 | 1.0000 | 0.00 | 0.00 | 1.0000 | 1.0000 | | | | M |

| | | | | |
|--------------------|---------------------|--------------------|---------------------|--------------------|
| All Summary | Item Summary | Receive All | Receive Item | Cancel Item |
|--------------------|---------------------|--------------------|---------------------|--------------------|

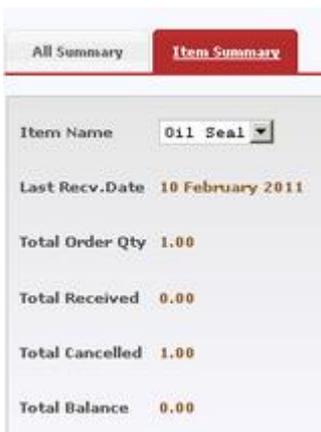
| | |
|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Item Name: Oil Seal Last Recv.Date: Total Order Qty: 1.00 Total Received: 0.00 Total Cancelled: 0.00 Total Balance: 1.00 | Items: Oil Seal Cancel Qty: 1 Cancel Date: 10 February 2011 Reason: Spec does not match requirement. Cancel All Items |
|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|

Figure 143: Canceling Goods on the Purchase Order

To process canceling of items, the steps are:

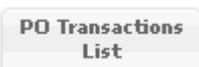
1. On the form above, select **Cancel Item Tab**.
2. On the summary form (on the left), select **Item Summary** to view summary detail on the delivery of this goods. If there was a partial delivery before, it will show up on the summary.
3. Fill in the Cancel **Qty**, **date** & **Reason** fields.

4. Click button below . This will update item summary as shown below.



The screenshot shows a summary form with the following details:

- Item Name: Oil Seal
- Last Recv.Date: 10 February 2011
- Total Order Qty: 1.00
- Total Received: 0.00
- Total Cancelled: 1.00
- Total Balance: 0.00

5. Click  to see the completed transaction listing as shown below.



The screenshot shows a table with the following data:

| # | Part Number | Description | Status | Qty | Unit Price | Date Received | DO No | Invoice No | Invoice Date |
|---|-------------|-------------|-----------|------|------------|------------------------|-------|------------|--------------|
| 1 | P003 | Oil Seal | Cancelled | 1.00 | 1.00 | 10 February 2011 00:00 | | | |

Summary: 1 records. Page 1 of 1. Navigation: First Previous Next Last. Buttons: Export to Excel, Print.

6. Finish.

10. CLEANING



ACCESSING CLEANING

You can access **Cleaning** on **CWorks EASY opening screen** by clicking the **icon** on the left, which will open **Cleaning Opening Screen**.

The screenshot shows the "CLEANING INSPECTION" interface. At the top, there is a dark red header with the text "CLEANING INSPECTION" on the left and a user welcome message "Welcome Elias Ishak" and a "Change Level" link on the right. Below the header, there is a row of five icons: "Cleaning Inspection List" (brush icon), "Cleaning Schedule" (calendar icon), "Cleaning Generation" (calendar with checkmark icon), "PM Task List" (list icon), and "Inspection Group" (magnifying glass icon). Below this row, a yellow message box contains the text: "Please set the cleaning weightage at the master module before you can create new inspection."

Note: If you get the message above, that means you have not yet set up the cleaning weightage. You should do that first in the **Master** section.

10.1 Cleaning Inspection Opening Screen

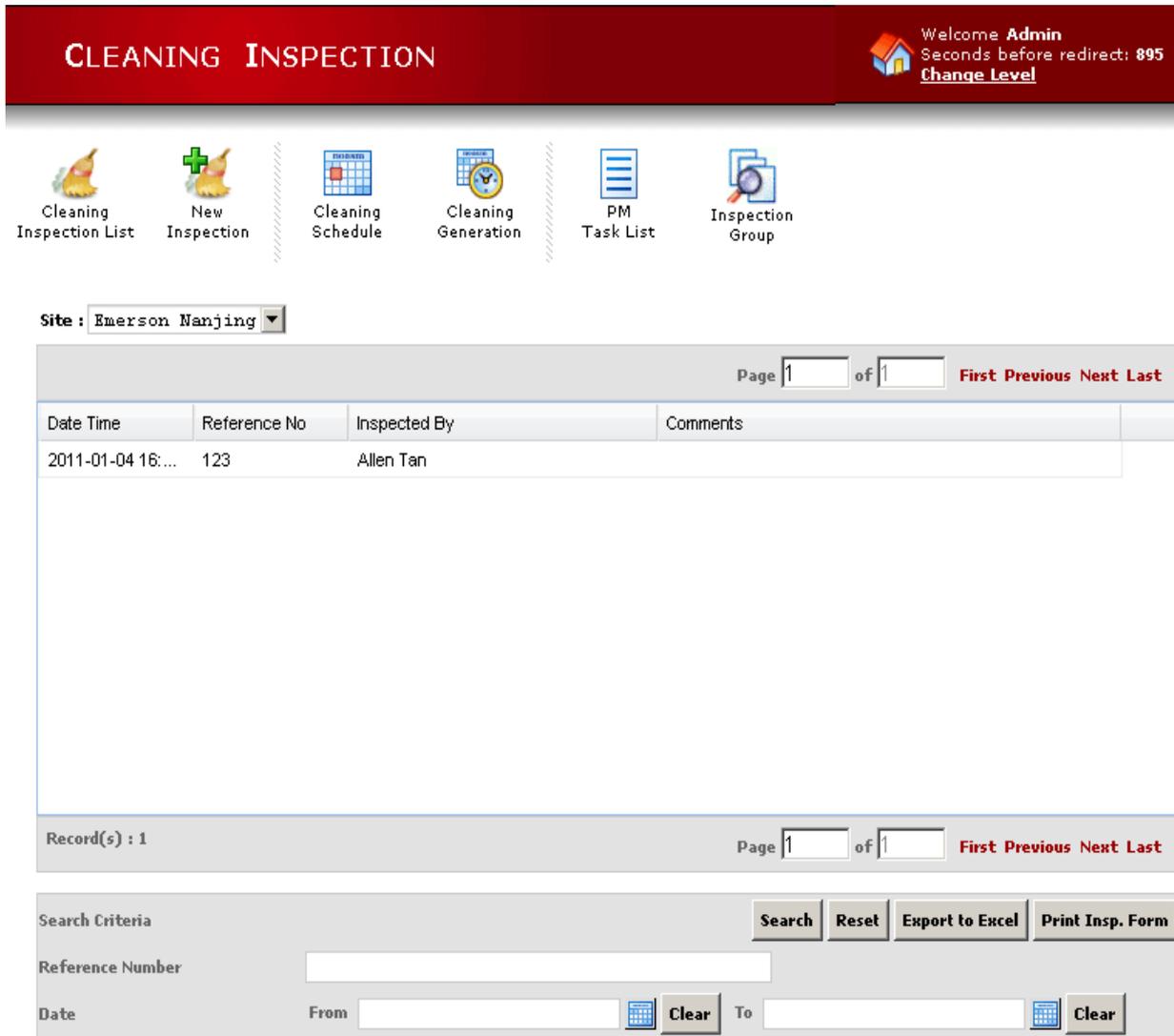


Figure 144: Cleaning Inspection Opening Screen

| CLEANING MENU ICONS | | |
|---------------------|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| No. | MENU ICON | DESCRIPTION |
| 1. |  Cleaning Inspection List | Go to the Cleaning Inspection Opening Screen . |
| 2. |  New Inspection | Create a new inspection |

| | | |
|----|----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| 3. |  Cleaning Schedule | Cleaning Schedules (Utility) |
| 4. |  Cleaning Generation | Generate PM Work Order for a specified period (This has been fully described in Preventive Maintenance Section) |
| 5. |  PM Task List | PM Task List Management Utility (This has been fully described in Preventive Maintenance Section) |
| 6. |  Inspection Group | Setting up Inspection Groups (Utility) |

10.2 How to Create New Cleaning Inspection

NEW CLEANING INSPECTION

 Welcome **Elias Ishak**
 Seconds before redirect: **1166**
[Change Level](#)








Site : Emerson Nanjing

Inspection Details

| | |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date | <input style="width: 90%;" type="text"/>  <input type="button" value="Clear"/> |
| Reference No | <input style="width: 90%;" type="text"/> |
| Inspection By | <input style="width: 90%;" type="text"/> <input type="button" value="..."/> <input type="button" value="Clear"/> |
| Comments | <div style="border: 1px solid #ccc; height: 30px; width: 95%;"></div> |

Figure 145: Creating a New Cleaning Inspection

Here are the steps to create a **new cleaning inspection**:



1. On the **Cleaning Inspection Opening Screen** shown in **Figure 144**, click **New Inspection** to open new inspection form as shown in **Figure 145** above.
2. Fill in the date, Reference No., Inspection By and Comments.
3. Click **Save Button** to save. After saving, the CMMS will change the editing form to that shown below.

Site : Emerson Nanjing

Inspection Details

Cleaning List

Date

Reference No **CLN-1003**

Inspection By

Comments

At this point, you can exit if you want.

4. Click on **Cleaning List** tab. This will switch to this tab as shown below.

Site : Cworks Malaysia

Inspection Details

Cleaning List

Department

Location

Group

Inspection Date

Rating

Floor

Wall

Window/Door

Ceiling

Furniture/Fix/Equip

Waste Bag Holder

Consumables

Remarks

Cleaning Inspection List

| # | Department | Location | Inspection Date | Group | Floor | Wall | Window/Door | Ceiling | Furniture/Fix/Equip | Waste Bag Holder | Consumables | Record (%) | Acceptability | Remarks | Option |
|---|------------|----------|-----------------|-------|-------|------|-------------|---------|---------------------|------------------|-------------|------------|---------------|---------|--------|
| | | | | | | | | | | | | | | | |

5. Fill in Department, Location, Group, Inspection Date fields and remarks fields accordingly.
6. Set the ratings accordingly.
7. Click **Save Into List**.

- Repeat step (5) to (6) if you have more cleaning details to add.
- Finish.

10.3 How to Edit Existing Inspection

The screenshot displays the 'CURRENT CLEANING INSPECTION' interface. At the top, a red banner contains the title and a user welcome message: 'Welcome Elias Ishak', 'Seconds before redirect: 1195', and a 'Change Level' link. Below the banner are six icons representing different functions: 'Cleaning Inspection List', 'New Inspection', 'Cleaning Schedule', 'Cleaning Generation', 'PM Task List', and 'Inspection Group'. The 'Inspection Details' tab is selected, showing a form with the following fields and controls:

- Date:** 1 February 2011 13:53, with a calendar icon and a 'Clear' button.
- Reference No:** FG4510
- Inspection By:** 002 - John Baker, with a dropdown arrow and a 'Clear' button.
- Comments:** Created Feb 9, 2011 - Thurs, with a text area and scroll arrows.
- update** button at the bottom.

Figure 146: Opening Existing Cleaning Inspection for editing

Here are the steps to edit or modify an **existing cleaning inspection**:

- From the **inspection listing** on the **Cleaning Inspection Opening Screen** shown in **Figure 144**, select existing inspection for editing by clicking on any column of the **inspection number**. This will open the cleaning inspection for editing as shown in **Figure 146** above.
- On the **Inspection Detail Tab**, edit any of the fields as necessary and click **update** to save the changes.

3. Next, click on **Cleaning List** tab. This will switch to this tab as shown below.

Site : Cworks Malaysia

Inspection Details **Cleaning List**

Department: Department 1

Location: [Text Field] [Clear]

Group: o1

Inspection Date: [Text Field] [Clear]

Rating:

- Floor: 3 - Good
- Wall: 3 - Good
- Window/Door: 3 - Good
- Ceiling: 3 - Good
- Furniture/Fix/Equip: 3 - Good
- Waste Bag Holder: 3 - Good
- Consumables: 3 - Good

Remarks: [Text Field]

[Save Into List]

| # | Department | Location | Inspection Date | Group | Floor | Wall | Window/Door | Ceiling | Furniture/Fix/Equip | Waste Bag Holder | Consumables | Record (%) | Acceptability | Remarks | Option |
|---|--------------|-----------|-----------------------|-------|-------|------|-------------|---------|---------------------|------------------|-------------|------------|---------------|------------------------------|---------------|
| 1 | Department 1 | Location1 | 1 February 2011 14:19 | o1 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 75.00 | Satisfactory | Location is on the West Wing | DELETE |

- To add a new cleaning detail, fill in Department, Location, Group an Inspection Date fields.
- Set or edit the ratings accordingly.
- Click **Save Into List**.
- Repeat step (5) to (6) if you have more cleaning details to add.
- To delete an existing cleaning detail in the listing at the bottom of the form, click on the **Delete link**.
- Finish.
-

10.4 Cleaning Schedule

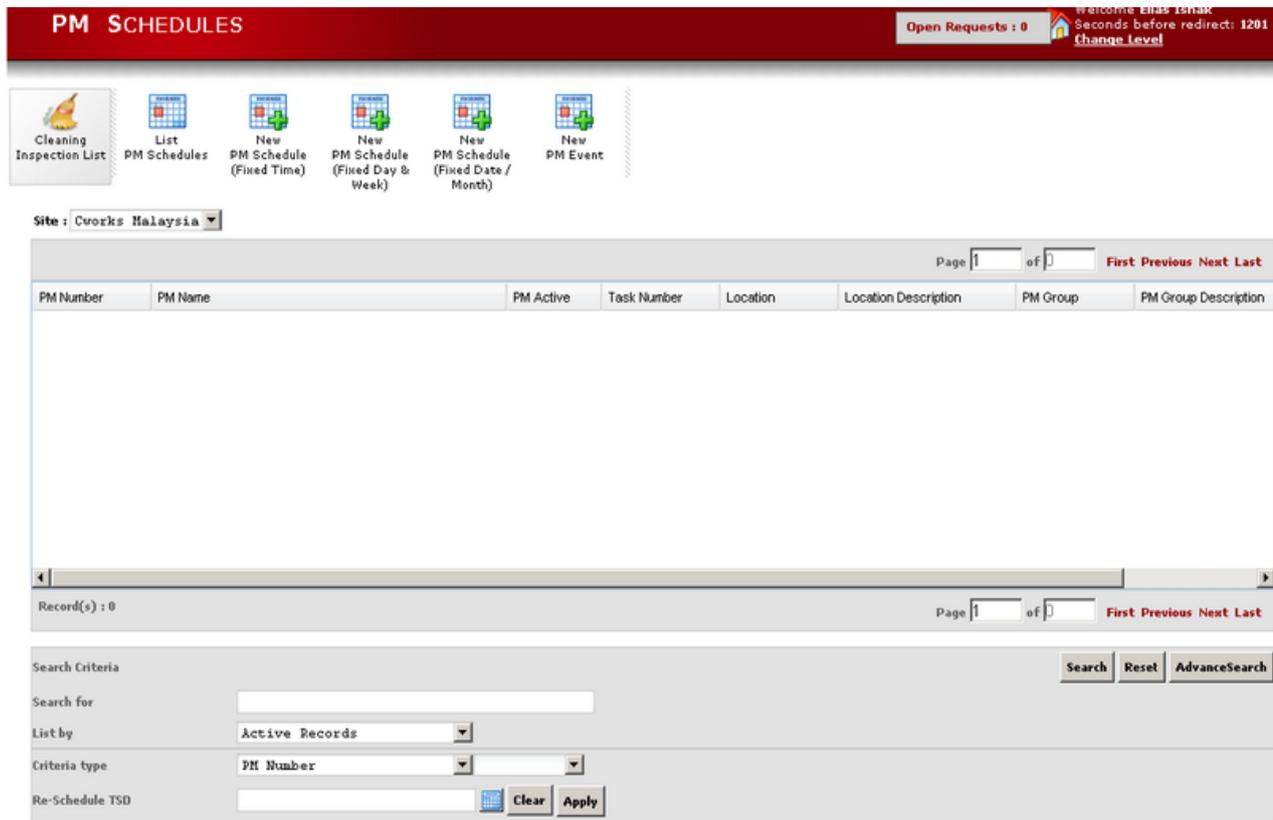


Figure 147: PM Schedules Listing Screen



On the **Cleaning Inspection Opening Screen** shown in **Figure 144**, click to go to the **cleaning PM schedule screen** as shown in **Figure 147** above.

| CLEANING SCHEDULE | | |
|-------------------|-----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| No. | Menu Icon | Description |
| 1. |  Cleaning Inspection List | Go to the Cleaning Inspection Opening Screen . |
| 2. |  List PM Schedules | A click on this icon will take you to PM Schedule (Time-based) Opening Screen where you will find all PM Schedule Listing |

| | | |
|----|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|
| 3. |  New PM Schedule (Fixed Time) | Create New PM Schedule (Fixed Time) |
| 4. |  New PM Schedule (Fixed Day & Week) | Create New PM Schedule (Fixed Day & Week) |
| 5. |  New PM Schedule (Fixed Date / Month) | Create New PM Schedule (Fixed Day & Month) |
| 6. |  New PM Event | Create New PM Event |

The menu icons in the table above are exactly similar to the menu icons in the **PM section**. Please refer to the PM Section for description on how to fill them in since the work in a very similar manner.

10.4.1 How to Create New PM Schedule (Fixed Time)

NEW PM SCHEDULE Welcome **Elias Ishak**
Seconds before redirect: **1199**
[Change Level](#)


Cleaning Inspection List


List PM Schedules


New PM Schedule (Fixed Time)


New PM Schedule (Fixed Day & Week)


New PM Schedule (Fixed Date / Month)


New PM Event

Site : Cworks Malaysia

PM Schedule

PM Number auto-generate

PM Name

Work Type

Work Trade

PM By

Location

Location No. - Desc.

Inspection Group

Group No. - Desc.

Task Number

PM Generation Type

Frequency Unit

Frequency Target Start Date

Days Target Complete Date

Work Period Day(s) Next Start Date

Figure 148: Creating New PM Schedule (Fixed Time)



New
PM Schedule
(Fixed Time)

On the **cleaning PM schedule screen** as shown in **Figure 147** above, click **New PM Schedule (Fixed Time)** to open the **New PM Schedule (Fixed Time) screen** as shown in **Figure 148** above.

Please refer to the **Preventive Maintenance Section 6** for description on how to process the form above.

10.4.2 How to Create New PM Schedule (Fixed Day & Week)

PM Schedule

| | | | |
|-------------------------------------------|------------------------------------------------------------------------------|-------------------------------------|-----------------------------------------------------------------------|
| PM Number | <input type="text"/> | <input checked="" type="checkbox"/> | auto-generate |
| PM Name | <input type="text"/> | | |
| Work Type | <input type="text" value="Preventive"/> <input type="button" value=""/> | | |
| Work Trade | <input type="text" value="TM - Mechanical"/> <input type="button" value=""/> | | |
| PM By | | | |
| <input checked="" type="radio"/> Location | | | |
| Location No. - Desc. | <input type="text"/> | <input type="button" value="..."/> | <input type="button" value="Clear"/> |
| <input type="radio"/> Inspection Group | | | |
| Group No. - Desc. | <input type="text"/> | <input type="button" value="..."/> | <input type="button" value="Clear"/> |
| Task Number | <input type="text"/> | <input type="button" value="..."/> | <input type="button" value="Clear"/> |
| Frequency (Months) | <input type="text" value="1"/> | Year | <input type="text" value="2011"/> |
| Work Periods Days | <input type="text" value="1"/> | Start Month | <input type="text" value="February"/> <input type="button" value=""/> |
| Day of Week | <input type="text" value="Sunday"/> <input type="button" value=""/> | Target Start Date | |
| Week of Month | <input type="text"/> <input type="button" value=""/> | Target Complete Date | |
| | | Next Date | |

Figure 149: New PM Schedule (Fixed Day & Week)



On the **cleaning PM schedule screen** as shown in **Figure 147** above, click  to open the **New PM Schedule (Fixed Time) screen** as shown in **Figure 149** above.

Please refer to the **Preventive Maintenance Section 6** for description on how to process the form above.

10.4.3 How to Create New PM Schedule (Fixed Date & Month)

PM Schedule

| | | | |
|-------------------------------------------|------------------------------------------------------------------------------|-----------------------------------------------|--------------------------------------------------------------|
| PM Number | <input type="text"/> | <input checked="" type="checkbox"/> | auto-generate |
| PM Name | <input type="text"/> | | |
| Work Type | <input type="text" value="Preventive"/> <input type="button" value=""/> | | |
| Work Trade | <input type="text" value="TH - Mechanical"/> <input type="button" value=""/> | | |
| PM By | | | |
| <input checked="" type="radio"/> Location | | | |
| Location No. - Desc. | <input type="text"/> | <input type="button" value="..."/> | <input type="button" value="Clear"/> |
| <input type="radio"/> Inspection Group | | | |
| Group No. - Desc. | <input type="text"/> | <input type="button" value="..."/> | <input type="button" value="Clear"/> |
| Task Number | <input type="text"/> | <input type="button" value="..."/> | <input type="button" value="Clear"/> |
| Frequency (Monthly) | <input type="text" value="1"/> | Target Start Date | <input type="text"/> <input type="button" value="Calendar"/> |
| | | | <input type="button" value="Clear"/> |
| Work Period Day(s) | <input type="text" value="1"/> Monthly | <input type="checkbox"/> Target Complete Date | |
| | | Next Start Date | |

Figure 150: New PM Schedule (Fixed Date & Month)



On the **cleaning PM schedule screen** as shown in **Figure 147** above, click **New PM Schedule (Fixed Date / Month)** to open the **New PM Schedule (Fixed Time) screen** as shown in **Figure 150** above.

Please refer to the **Preventive Maintenance Section 6** for description on how to process the form above.

10.4.4 How to Create New PM Event

The screenshot shows a web-based form titled "PM Schedule". At the top right, there is a "save" button. Below the title bar, there are several input fields and dropdown menus:

- PM Number:** A text input field followed by a checked checkbox labeled "auto-generate".
- PM Name:** A text input field.
- Work Type:** A dropdown menu currently showing "Preventive".
- Work Trade:** A dropdown menu currently showing "TM - Mechanical".
- PM By:** A section with two radio buttons: "Location" (selected) and "Inspection Group".
- Location:** A search field labeled "Location No. - Desc." with a search icon and a "Clear" button.
- Inspection Group:** A search field labeled "Group No. - Desc." with a search icon and a "Clear" button.

At the bottom right of the form, there is another "save" button.

Figure 151: New PM Event



On the **cleaning PM schedule screen** as shown in **Figure 147** above, click  to open the **New PM Event screen** as shown in **Figure 151** above.

Please refer to the **Preventive Maintenance Section 6** for description on how to process the form above.

10.5 Cleaning Generation

PM GENERATION

 Welcome Admin
 Seconds before redirect: 895
[Change Level](#)

Cleaning Inspection List

Site: Emerson Nanjing

PM Generation

| | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| Last PM Generated Date | 11 January 2011 |
| Last Date Range of PM WD Generated | 14 January 2011 |
| Date for PM to be Generated | <input style="width: 100%;" type="text"/> Clear |
| View PM Open PM WD Export PM Forecast Print | |

Schedule PM

| # | PM Number | PM Name | PM WD No | PM WD Raise | Task Number | Asset No. | Location No. | Group No. | Target Start | Target Complete | Next PM Date |
|-------------------------|-----------|---------|----------|-------------|-------------|-----------|--------------|--------------|-----------------|-----------------|--------------|
| Actual Complete Date PM | | | | | | | | | | | |
| # | PM Number | PM Name | PM WD No | PM WD Raise | Task Number | Asset No. | Location No. | Target Start | Target Complete | Next PM Date | |

Figure 152: Cleaning PM Generation



On the **Cleaning Inspection Opening Screen** shown in **Figure 144**, click to open **Cleaning PM Generation** form as shown in **Figure 152** above.

Please refer to the **Preventive Maintenance Section 6** for description on how to Process the form above.

10.6 Cleaning – PM Task List

This section allows you to create **Cleaning PM Task** identical to that found in **Preventive Maintenance Section 6.2**. Please refer to that section on handling PM Task processing.

Welcome **Elias Ishak**
Seconds before redirect: **1197**
[Change Level](#)

Cleaning Inspection List
 List PM Tasks
 New PM Task

Site :

Page of [First](#) [Previous](#) [Next](#) [Last](#)

| PM Task Number | PM Task Name | Est. Labour Hrs. | Status |
|----------------|---------------------------|------------------|--------|
| CTN514 | Location 10 Cleaning Task | 2 | Active |

Record(s) : 1 Page of [First](#) [Previous](#) [Next](#) [Last](#)

Search for in

Display

Figure 153: Cleaning – PM Task List Opening Screen

NEW PM TASK Welcome **Elias Ishak**
Seconds before redirect: **1175**
[Change Level](#)


Cleaning
Inspection List


List
PM Tasks


New
PM Task

PM Task

| | |
|--------------------------|-------------------------------------|
| PM Task Number | <input type="text"/> |
| PM Task Name | <input type="text"/> |
| Remarks | <input type="text"/> |
| Est. Labour Hours | <input type="text"/> |
| PM Task Active | <input checked="" type="checkbox"/> |

Figure 154: Creating Cleaning New PM Task

Please refer to the **Preventive Maintenance Section 6.2.1** for description on how to Process the form above.

11. REPORTS



ACCESSING REPORTS

You can access **Reports** on **CWorks EASY** **opening screen** by clicking the **icon** on the left, which will open the **Reports Opening Screen**.

Data accumulated in the CWorks EASY over time through maintenance activities are very useful to the management in many ways especially in making financial and operational decisions. These data are retrievable in the form of numerous reports which are available via the **Report Section**.

11.1 Accessibility to Full Reports: Exception to the rules

There is a **special case** when the CMMS **blocked** user access to the report even though administration has granted full access to the user. The rationale behind this is that: If a user access to the majority of the features has been blocked for security reasons, therefore it stands to reasons that access to the reports that reveal those information should also be blocked.

To demonstrate this exception, **Figure 155** below shows a sample settings of various modules access privileges.

| <i>Employee Login & Accessible Details</i> | | | | |
|------------------------------------------------|----------------------------------|-----------------------|----------------------------------|------------------|
| <i>Module Accessibilities</i> | <i>Authentication Permission</i> | <i>Employee Login</i> | <i>Site</i> | <i>Worktrade</i> |
| <i>Main Module Name</i> | <i>Hidden</i> | <i>Read Only</i> | <i>Full Access</i> | |
| <i>Work Orders</i> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | |
| <i>Assets</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| <i>Location</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| <i>Preventive</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| <i>Employees</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| <i>Material</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| <i>Work Request</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| <i>Masters</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| <i>Reports</i> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | |
| <i>Administration</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| <i>Purchase Order</i> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

Figure 155: Exception to the rules – the CMMS has denied full access to the Reports for security reasons even though administration has granted full access to the user.

11.2 How to Generate CWorks EASY Reports

REPORTS

Site :

Report Group

| Report Group | Report Name |
|--------------|-----------------------------------------|
| Assets | Asset Details |
| Assets | Asset Downtime Report by Date and Asset |
| Assets | Asset List |
| Assets | Asset List by Department |
| Assets | Asset Maintenance History |
| Assets | Failure Type Analysis (Downtime) |
| Assets | Failure Type Analysis (Frequency) |
| Assets | Mean Time Before Failure (MTBF) Report |
| Assets | Mean Time To Repair (MTTR) Report |
| Assets | Warranty Report |
| Employee | Employee-Customer Details |
| Employee | Employee-Customer List |
| Employee | Overtime by Employee |
| Location | Location List |
| Location | Location Maintenance History |
| Master | Contractor-Supplier Details |
| Master | Contractor-Supplier List |

Figure 156: Reports Main Menu – General Listing of all Reports



In **CWorks EASY Menu**, click the Reports button  to display the general listing of all available reports. This is shown in Figure 156. First, make sure that you have selected the correct site for the reports, using the current site selector.

Notice that the **Report Group** drop-down list shows [All] as shown here:

Site :

Report Group

If you click the drop-down list, you will see that the report is also conveniently grouped into smaller related groups as shown here in Figure 157:

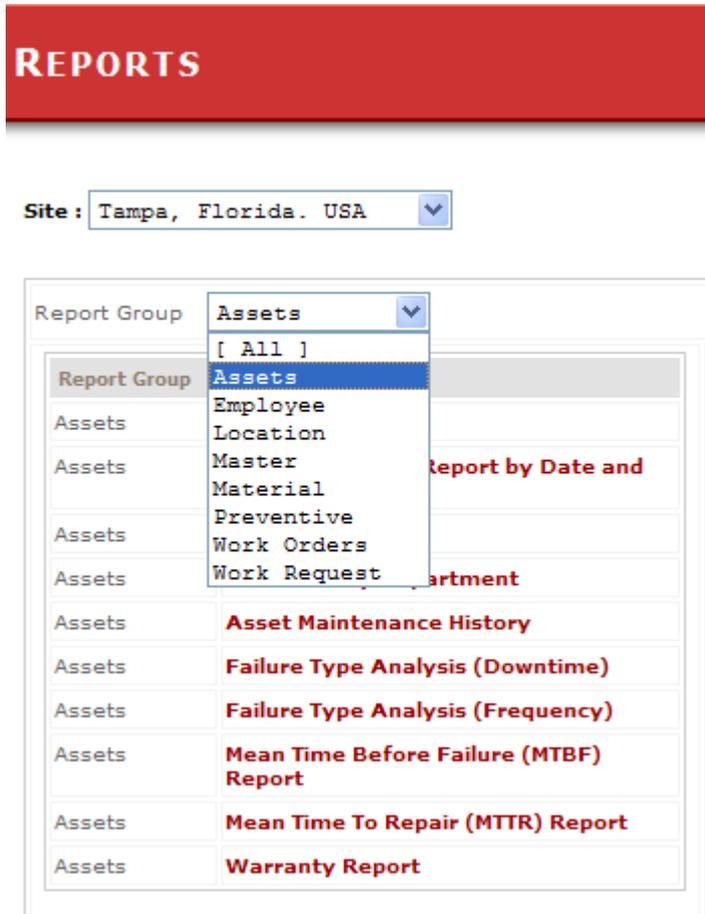


Figure 157: The available Reports are divided into a smaller related Groups

For instance, if only Material reports interests you, then on clicking **Material**, the display will only shows:



Other reports are hidden. Similarly, you also get a display as above if you click any other group in the Report Group drop-down list.

11.3 Available Reports

The following are samples of reports available.

11.3.1 Asset Details

| Asset Details Report | | | |
|-------------------------|-----------------------------------------|--------------------------|-----------|
| Asset Number | 886000015 | Purchase Price | 0 |
| Asset Description | WASHER | Date Disposed | |
| Location No | 01GF010 | Current Value | 1 |
| Department No | 103 - Central Sterile Supply Department | Warranty/Contract | |
| Asset Category | Washer / Disinfector | Warranty/Contract Expiry | 5/21/2003 |
| Status | Active | Contractor | |
| Model No | GUARDIAN SLIMLINE | Vendor/Supplier | |
| Serial No | 5682 | Authorized Employee | |
| Date Acquired | 5/22/2002 | Criticality | Normal |
| Asset Notes | | | |
| Warranty/Contract Notes | | | |
| Notes To Tech | | | |

Figure 158: Asset Details Report

11.3.2 Asset List

| Asset Number | Asset Description | Asset Category | Location No | Model No | Serial No | Status | Department | Purchase Price |
|--------------|--------------------------------|----------------|-------------|------------------------|-------------------|--------|------------|----------------|
| 886000015 | WASHER | 870101 | 01GF010 | GUARDIAN SLIMLINE | 5682 | Active | 103 | .00 |
| 886000016 | WASHER | 870101 | 16GF024 | GUARDIAN SLIMLINE | 5684 | Active | 103 | 15,000.00 |
| 886000017 | WASHER | 870101 | 16GF024 | GUARDIAN SLIMLINE | 5681 | Active | 103 | 18,000.00 |
| 886000018 | HT TRANSFORMER (11kv) | 310209 | 05GF016 | GUARDIAN SLIMLINE | 5685 | Active | 102 | 250,000.00 |
| 886000236 | AIR HANDLING UNIT (AHU 1) | 460301 | 01GF001 | CARRIER 42JS-012 | 4003678 | Active | 104 | 10,000.00 |
| 886000238 | AIR HANDLING UNIT (AHU 2) | 460301 | 01GF001 | CARRIER 42JS-012 | 4020222 | Active | 104 | 10,000.00 |
| 886000248 | VEHICLE - AMBULANCE | 780302 | 0300000 | LAND ROVER | SALLDHH7LA-936076 | Active | 101 | 0.00 |
| 886000402 | FIRE EXTINGUISHER - DRY POWDER | 560202 | 01GF014 | EVERSAFE EC-9 | 141787 | Active | 102 | 1,000.00 |
| 886000403 | FIRE EXTINGUISHER - DRY POWDER | 560202 | 01GF022 | EVERSAFE EC-9 | 147136 | Active | 102 | 0.00 |
| 886000669 | STANDBY GENERATOR | | 0900000 | IVECO 8210SR125.01A581 | 467266 | Active | 102 | 300,000.00 |
| 886000675 | WASHER - BED PAN | 870101 | 01GF010 | GUARDIAN SLIMLINE | 5683 | Active | 103 | 0.00 |
| 886000787 | FIRE EXTINGUISHER - DRY POWDER | 560202 | 01GF025 | FLAMMART PSC-20 | 255437 | Active | 102 | 0.00 |

Figure 159: Asset List Report

11.3.3 Asset Maintenance History

Asset Maintenance History Filter

Asset Number ...

Figure 160: Select Asset

Select asset and click “List” to view the maintenance history.

| Asset Maintenance History Report | | | | | | | | |
|----------------------------------|-------------------------------|------------|----------|------------|-------------|-------------|---------------|------------|
| Asset Number: | | 886000017 | | | | | | |
| Asset Description: | | WASHER | | | | | | |
| Work Order No. | Problem Description | Date Start | Date End | Work Type | Work Status | Labour Cost | Material Cost | Total Cost |
| OV106000191 | Preventive - AM100 - MEDIDOR | | | Preventive | | 0.00 | 0.00 | 0.00 |
| OV106000731 | Patient Monitoring System | | | Repair | | 0.00 | 0.00 | 0.00 |
| OV106000734 | Preventive - issa-test - test | | | Preventive | | 0.00 | 0.00 | 0.00 |
| Total Maintenance Cost: | | | | | | | | 0.00 |

Figure 161: Asset Maintenance History Report

11.3.4 Employee – Requester Details

| Employee - Requester Details Report | | | |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------------|
| EmployeeNO | 001 | Work Phone | 092962944 |
| Name | Mohamad Anuar B. Hamzah | Extension | |
| Address | Pej. Urus Bangunan BLSB, Tingkat Bawah, Bangunan Persekutuan Temerloh, Jalan Merdeka, 28000 Temerloh, Pahang Darul Makmur. | HandPhone | 0197666764 |
| Designation | Pengurus Bangunan / PJE | Office Location | Bangunan Persekutuan Temerloh |
| Department No | 11 | HourlySalary | 10 |
| Dept Description | Building Lindungan Sdn Bhd | OverTime1 | 20 |
| Email | anuar@buildinglindungan.com | OverTime2 | 30 |
| | | OverTime3 | 40 |

Figure 162: Employee-Requester Details Report

11.3.5 Employee – Requester List

| Employee - Requester List Report | | | | |
|----------------------------------|-------------------------|---------------------|-----------------------------------|--------------|
| Employee No | Name | Designation | Department | Work Phone |
| A001 | Timothy Lyle | CworksAdministrator | | |
| C001 | Ahmad B. Abu | Clerk | Administration | 03-74566555 |
| C002 | Siti Hajar Bt. Bakar | Secretary | Pharmacy | 03-75556545 |
| C003 | Dr. John Adams | Doctor | In-Patient Services | 021039021930 |
| C004 | Sister Amy Teoh | Penjaga Toilet | Out-Patients Department (OPD) | 2319020219 |
| C006 | Sister June Tan | SISTER | Central Sterile Supply Department | 876543 |
| E001 | Hasrina Abd. Halil | CMMS Executive | | 03-89459041 |
| E002 | N. Jivaraja | Technician | | 03-89459041 |
| E003 | Jamal Ali B. Jamal Mohd | Engineer | | 03-89459041 |
| 5518 | David C | Supervisor | Maintenanc | |
| RP001 | Ray | | Maintenanc | |
| hsjhs5034 | qwaeqsd | | Maintenanc | |
| 200200 | ALEJANDRA | | Administration | 82662090 |
| 20200 | ALEJANDRA | | Administration | 82662090 |
| 100100 | CLINT GRACE | | Maintenanc | 639-1775 |

Figure 163: Employee-Requester Lists Report

11.3.6 Supplier List

| Contractor - Supplier List Report | | | | | |
|-----------------------------------|-----------------------------|----------------|-----------------|---------------|--------------|
| Supplier No | Supplier Name | Contact Person | Designation | Phone Number | Fax Number |
| S001 | Civil Hardware Supplies Ltd | Ali Bin Abu | Manager | 03-778989987 | 03-778989984 |
| S002 | Power Systems Ltd | Tommy Kieth | saleman | 12090-3012920 | 2092-03930 |
| S003 | Mediserve Sdn Bhd | | | | |
| S004 | Jetcool Ltd | | | | |
| 1010 | PRAVEEN SOFTWARE LTD | PRAVEEN | ENGINEER | | |
| E001 | City Eelctrical Factors | Alex Pocock | | 02083931234 | |
| S0001 | City & Suburban Pools | Greg Ferris | Pool Contractor | 99682040 | 99672111 |

Figure 164: Contractor-Supplier List Report

11.3.7 Supplier Details

| Contractor-Supplier Details Report | | | |
|------------------------------------|-----------------------------------------------------------|----------------|------------|
| Supplier No | S001 | City | Kota Bharu |
| Supplier Name | Chop Hup Seng | Postal Code | 15050 |
| Address | No.3991-D, Jln Sultanah Zainab,15050 Kota Bharu, Kelantan | State/Province | Kelantan |
| Designation | | Country | Malaysia |
| Phone Number | | Fax Number | |

Figure 165: Contractor-Supplier Details Report

11.3.8 Work Order List

Work Order List Filter

Work Type: Corrective

Work Status: Closed

Work Trade: Electrical

Work Priority: Urgent

Requester:

Asset No:

Location No:

Description:

PM Start Date: From To

Date Received: From To

Sort: Work Type Work Status Asset No Location No Description
 PM Start Date Date Received

Order: None Ascending (A->Z) Descending (Z->A)

Figure 166: Work Order Filter

Generate report for work order based on the filters below.

| FIELDS | DESCRIPTION |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Work Type | To search by <i>Work Type</i> select an option from the respective drop-down list. |
| Work Status | To search by <i>Work Status</i> , select an option from the respective drop-down list. |
| Work Trade | To search by <i>Work Trade</i> , select an option from the respective drop-down list. |
| Work Priority | To search by <i>Work Priority</i> select an option from the respective drop-down list. |
| Requester | To search by problem <i>Requester</i> , click the respective <input type="button" value="..."/> button to get a list of personnel names. |
| Asset No. | To search by <i>Asset No.</i> , click the respective <input type="button" value="..."/> button to get a list of asset numbers. |
| Location No | To search by <i>Location No.</i> , click the respective <input type="button" value="..."/> button to get a list of location numbers. |
| Description | To search by problem <i>Description</i> , click the respective <input type="button" value="..."/> button to get a list of problem descriptions. |
| PM Start Date | To search by <i>PM Start Date</i> , click on <input type="button" value="..."/> for both <i>From</i> and <i>To</i> fields. |
| Date Received | To search by <i>Date Received</i> , click on <input type="button" value="..."/> for both <i>From</i> and <i>To</i> fields. |

| | |
|--------------|----------------------------------------------|
| Clear | Click the button to clear any of the fields. |
| Reset | Click button to reset search criteria. |
| List | List out work orders. |

The generated work order list report.

| Work Order List Report | | | | | | | | | |
|------------------------|------------------------------------------|------------|-----------|-------------------|-------------|---------------|----------------------|-----------------------|-------------|
| Filter Criteria | | | | | | | | | |
| Work Type: | 'Corrective', 'Preventive' | | | | | | | | |
| Work Status: | 'Closed' | | | | | | | | |
| Work Trade: | 'Electrical' | | | | | | | | |
| Work Priority: | 'Urgent', 'Normal' | | | | | | | | |
| Requester: | (all) | | | | | | | | |
| Asset No: | (all) | | | | | | | | |
| Location No: | (all) | | | | | | | | |
| Description: | (all) | | | | | | | | |
| PM Start Date: | (all) | | | | | | | | |
| Date Received: | (all) | | | | | | | | |
| Work Order No | Problem Description | Work Type | Asset No | Asset Description | Location No | Date Received | Date Start | Date End | Work Status |
| 0000000005 | Standby Generator Preventive Maintenance | Preventive | 886000669 | STANDBY GENERATOR | 0900000 | 8/30/2004 | 8/31/2004 9:00:00 AM | 8/31/2004 10:00:00 AM | Closed |
| 0000000006 | Standby Generator Preventive Maintenance | Preventive | 886000669 | STANDBY GENERATOR | 0900000 | 8/30/2004 | 9/3/2004 9:00:00 AM | 9/3/2004 11:00:00 AM | Closed |

Figure 167: Work Order List Report

11.3.9 Work Order Details

Site: Tampa, Florida. USA

Report Group: Work Orders

| Report Group | Report Name |
|--------------|----------------------------------------|
| Work Orders | List of Pending Work Orders |
| Work Orders | Work Order by Trade Distribution Chart |
| Work Orders | Work Order by Type Distribution Chart |
| Work Orders | Work Order Details |
| Work Orders | Work Order List |
| Work Orders | Work Order Statistics (all sites) |
| Work Orders | Work Order Status Chart |
| Work Orders | Work Orders by Employees |
| Work Orders | Work Orders by Employees Chart |
| Work Orders | Work Orders by Requester |

Work Order Details

Generate Report

Work Order No: To:

Work Status:
(all except Closed or Cancelled)

Work Order Desc:

Work Order Received Date

From: To:

Sort By:

Work Trade:

Figure 168: Form to generate Work Order Details Report

On running the above report by clicking the **Generate Report** button, the result is as shown below.

| Work Order Details Report | | | |
|-------------------------------------------------------|------------------------------|---------------------|-----------------------------------------------------------|
| Work Status: (all except Closed or Cancelled) | | | |
| Work Order Received Date: 1 March 2009 To 20 May 2009 | | | |
| Location Description: Manufacturing Building No. 3 | | | |
| WorkOrder No | PMsc000109000001 | Description | Preventive - sc0001PM0001 - REPLACE FAULTY REGULATOR UNIT |
| Requester | | | |
| Asset No | ASSET-00001 | Act. Start Date | |
| Asset Description | | Act. End Date | |
| | | Action Taken | |
| Warranty/Contract Expiry | | Failure Code | |
| Location No | LOCN-0001 | Failure Description | |
| Location Description | Manufacturing Building No. 3 | Assign To | |
| Date Received | 19 March 2009 | Work Type | Preventive |
| Date Required | | Cause Description | |
| Est. Start Date | | PreventionTaken | |
| Est. End Date | | Work Status | Open |
| Work Priority | Normal | | |

| Work Order Details Report | | | |
|---------------------------|----------------------|---------------------|----------------------|
| WorkOrder No | 06000001 | Description | FAN COIL DOESNT WORK |
| Requester | | | |
| Asset No | | Act. Start Date | |
| Asset Description | | Act. End Date | |
| | | Action Taken | |
| Warranty/Contract Expiry | | Failure Code | |
| Location No | 05GF004 | Failure Description | |
| Location Description | | Assign To | |
| Date Received | 3/3/2006 7:58:00 PM | Work Type | Corrective |
| Date Required | 3/3/2006 | Cause Description | |
| Est. Start Date | 3/3/2006 11:15:00 AM | PreventionTaken | |
| Est. End Date | 3/3/2006 12:15:00 PM | Work Status | Waiting for Approval |
| Work Priority | Normal | | |

Figure 169: Work Order Details Report

11.3.10 Work Order Status Chart

Select Date Received to view Work Order Status Chart.

Work Order Status Chart Filter

Date Received From To

Figure 170: Work Order Status Chart Filter

The generated work order status chart is shown below:

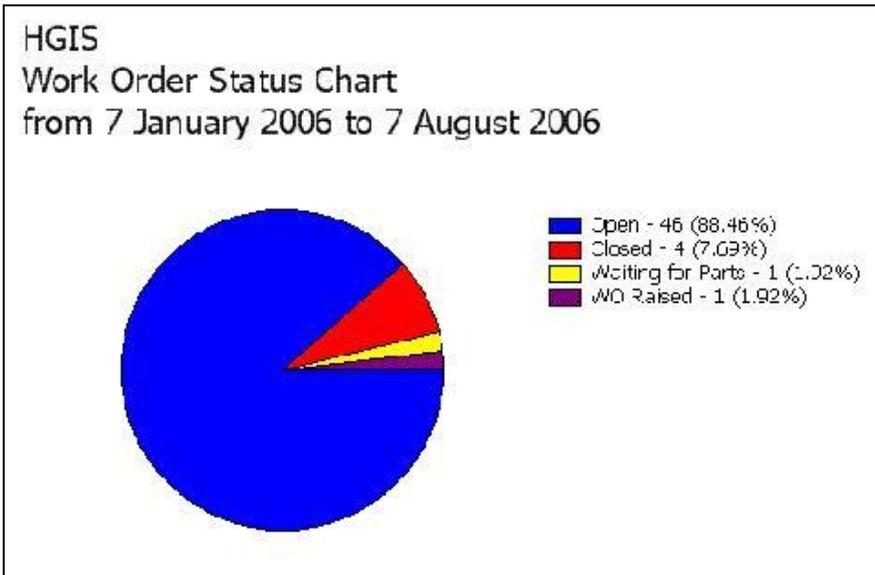


Figure 171: Work Order Status Chart

11.3.11 Work Order Distribution Chart

Select Date Received to view Work Order Distribution Chart.

Work Order Distribution Chart Filter

Date Received From To

Figure 172: Work Order Status Chart Filter

The generated work order distribution chart is shown below:

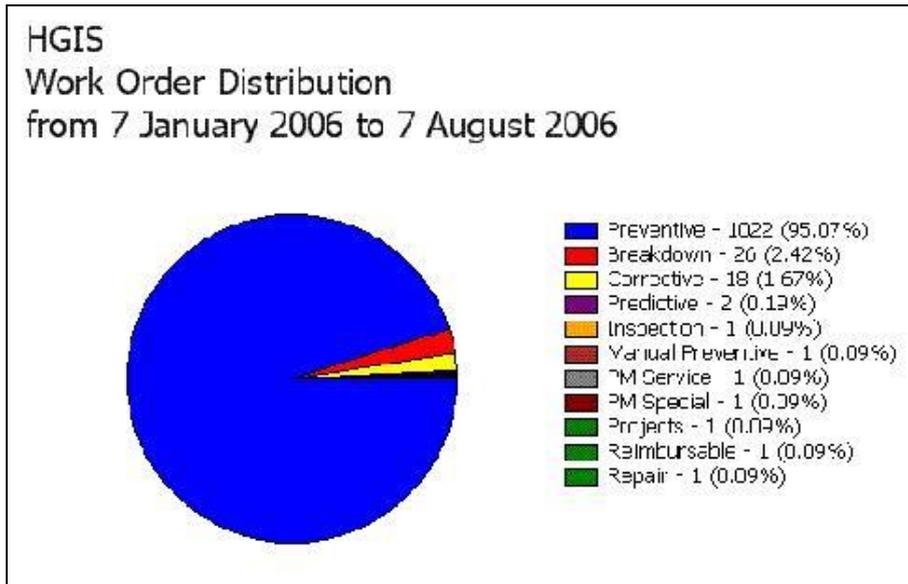


Figure 173: Work Order Distribution Chart

11.3.12 Department List

| List of Departments | |
|---------------------|-----------------------------------|
| Department No | Department Description |
| 001 | Administration |
| 100 | In-Patient Services |
| 101 | Administration |
| 102 | Engineering |
| 103 | Central Sterile Supply Department |
| 104 | Accidents & Emergencies |
| 105 | Library A |
| 106 | Canteen |
| 107 | Store |
| 108 | Out-Patients Department (OPD) |
| 109 | Pharmacy |
| 110 | Operating Theatre |
| 111 | Operation |

Figure 174: Department List Report

11.3.13 PM Task List

| PM Checklist | | |
|--------------|--------------------------------------|---------------------|
| ChecklistNo | CheckListName | EstimatedLaborHours |
| AHU001 | AHU/ ConVol/ BltDrv/ CW/ Monthly | 2 |
| AHU002 | AHU/ConVol/BltDrv/CW/Quarterly | 3 |
| E0001 | Generator/Diesel/Weekly | 2 |
| E0002 | Generator/Diesel/Monthly | 3 |
| E0099 | HT Transformer 11kV (Oil) / Annually | 4 |
| M50001 | Washer / Monthly | 1 |
| M01001 | AHU - Monthly | 1 |
| BLW | Beltloader 600 Monthly PM | 3 |

Figure 175: PM Task List Report

11.3.14 PM Task Checklist

| PM Task Checklist | | | |
|-------------------|---------------------------------------------------------------------------------------------------------|------------------------|---|
| PM Task No | AHU001 | Estimated Labour Hours | 2 |
| PM Task Name | AHU/ ConVol/ BltDrv/ CW/ Monthly | | |
| PM Checklist | | | |
| Sequence No | Sub Task Description | | |
| 1 | Inspect exterior duct and flex connectors for damage or air leaks. Make repairs as deemed necessary. | | |
| 2 | Inspect and clean interior of air handler. | | |
| 3 | Inspect fan V-belts. Adjust and/or align, if needed. | | |
| 4 | Inspect fan wheel for cleanliness, cracks. | | |
| 5 | Inspect coil for water leaks. | | |
| 6 | Checks drain pan for leaks, plugged drain or corrosion. | | |
| 7 | Check all filters, clean or replace if necessary. | | |
| 8 | Inspect all coils for cleanliness. Clean as required. | | |
| 9 | Inspect starter and any other electrical component, or control for wear, arcing, overheating condition. | | |
| 10 | Check controls and unit for proper operation. | | |
| 11 | Lubricate shaft and motor bearing, if necessary. | | |
| 12 | Clean all area around equipment. | | |

Figure 176: PM Checklist Report

11.3.15 PM Compliance Chart

Select PM Target Complete Date to view PM Compliance Chart.

PM Compliance Chart Filter

PM Target Complete Date From To

Figure 177: PM Compliance Filter

The generated PM compliance chart is shown below:

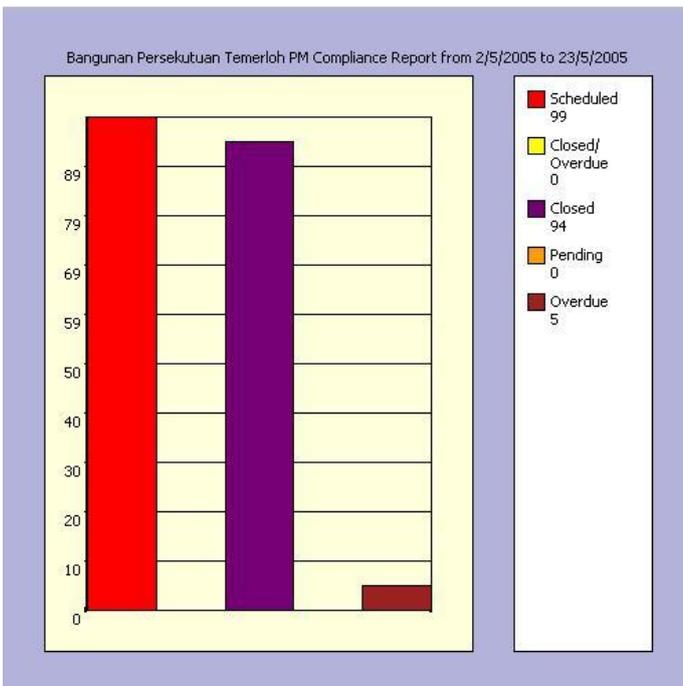


Figure 178: PM Compliance chart

11.3.16 Physical Location List

| Physical Location List | | | |
|------------------------|------------------------|---------------|-------------------------|
| Location No | LocationDescription | Department No | Department Description |
| 01GF001 | Sala riunioni | 101 | Administration |
| 01GF002 | A&E - MALE TOILET | 104 | Accidents & Emergencies |
| 01GF003 | A&E - WASHING ROOM | 104 | Accidents & Emergencies |
| 01GF004 | A&E - RESTROOM | 104 | Accidents & Emergencies |
| 01GF005 | A&E - FEMALE TOILET | 104 | Accidents & Emergencies |
| 01GF006 | A&E - DRIVERS ROOM | 104 | Accidents & Emergencies |
| 01GF007 | A&E - SWITCH GEAR ROOM | 104 | Accidents & Emergencies |

Figure 179: Physical Location List Report

11.3.17 Physical Location Maintenance History

Select Location Number to view Physical Location Maintenance History.

Physical Location Maintenance History Filter

Location Number: ...

Figure 180: Physical Location Maintenance History Filter

The generated work order distribution chart is shown below:

| Physical Location Maintenance History Report | | | | | | | |
|----------------------------------------------|-------------------------------------------------|-------------------|----------|-------------|-------------|---------------|------------|
| Location Number: | | 01GF002 | | | | | |
| Location Description: | | A&E - MALE TOILET | | | | | |
| Work Order No. | Problem Description | Date Start | Date End | Work Status | Labour Cost | Material Cost | Total Cost |
| OV106000004 | Please fix my sink. Parts: Mortice door knob | | | | 0.00 | 5.00 | 5.00 |
| OV106000726 | fix window | | | | 0.00 | 0.00 | 0.00 |
| Total Maintenance Cost: | | | | | | 5.00 | |

Figure 181: Physical Location Maintenance History Report

11.3.18 Purchase Proposal

| PURCHASE PROPOSALS | | | | | | | |
|--------------------|--------------------|-----------------|-----------|---------------|-----------|-----------------------|--|
| CRITICAL | | | | | | | |
| Part Number | Part Description | Current Balance | Min Level | Reorder Level | Max Level | Advised Reorder Level | |
| test | test | 1.00 | 20.00 | 2.00 | 20.00 | 19.00 | |
| 5 | ggg | 0.00 | 500.00 | 200.00 | 500.00 | 500.00 | |
| FILTER001 | AHU Primary Filter | -1.00 | 10.00 | 5.00 | 10.00 | 11.00 | |
| NORMAL | | | | | | | |
| Part Number | Part Description | Current Balance | Min Level | Reorder Level | Max Level | Advised Reorder Level | |
| | | | | | | | |

Figure 182: Purchase Proposal Report

11.3.19 Part Transaction Details

Select Transaction Type and date; Part No./Desc. and Attribute Group to view Part Transaction Details.

Material Stock Take List Report

Transaction Type: From: to:

Part No./Desc.:

Attribute Group:

Figure 183: Part Transaction Details Filter

The generated Part Transaction Details report is shown below:

| Part Transaction List | | | | | | | | |
|-----------------------|----------|-------------------|------------|------------|------------------|-------|-----------|-----------|
| No | Stock No | Stock Description | Attr Group | Trans Type | Trans Date | Qty | Price | Total |
| 1. | 09876 | Brass plug... | Door Knob | REC | 24 January 2006 | 20.00 | 10.00 | 200.00 |
| 2. | 09876 | Screw | Aircond | REC | 24 January 2006 | 20.00 | 10.00 | 200.00 |
| 3. | 09876 | Brass plug... | Door Knob | REC | 25 January 2006 | 1.00 | 1.00 | 1.00 |
| 4. | 09876 | Screw | Aircond | REC | 25 January 2006 | 1.00 | 1.00 | 1.00 |
| 5. | 1989871 | Seal | Gear Box | REC | 17 February 2006 | 5.00 | 12,000.00 | 60,000.00 |
| 6. | 09876 | Screw | Aircond | REC | 19 February 2006 | 20.00 | 9.50 | 190.00 |
| 7. | 09876 | Brass plug... | Door Knob | REC | 19 February 2006 | 20.00 | 9.50 | 190.00 |

Figure 184: Part Transaction Details Report

11.3.20 Stock Balance

Select the Attribute Group to view Stock Balance.

Stock Balance

Attribute Group:

Figure 185: Stock Balance Filter

The generated Stock Balance report is shown below:

| Stock Balance | | | | | | | | | | | | |
|---------------|-----------|------------------------|------------|--------|-----------|-----------|-----------|---------|---------|-------------|-----------|-----------|
| No | Part No | Part Description | Attr Group | UOM | Min Value | Tot Rec | Tot Iss | Tot Adj | Tot Ret | Tot Avg Bal | Tot Value | |
| 1. | COMP1HP | A/Cond Compressor-1 hp | Aircond | Pieces | 1 | 18.00 | 0.00 | 0.00 | 0.00 | 18.00 | 533.72 | 9,607.00 |
| 2. | FILTER001 | AHU Primary Filter | Aircond | Pieces | 2 | 0.00 | 1.00 | 0.00 | 0.00 | -1.00 | 0.00 | 0.00 |
| 3. | 18-1542 | awning 19' burg | Door Knob | Pieces | 2 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 258.63 | 0.00 |
| 4. | 4567890 | Bolt | Gear Box | Pieces | 10 | 70.00 | 2.00 | 0.00 | 1.00 | 69.00 | 80.72 | 5,570.00 |
| 5. | 09876 | Brass plug... | Door Knob | Litres | 1 | 310.00 | 34.00 | 11.00 | 12.00 | 299.00 | 30.50 | 9,118.59 |
| 6. | 100 | dfhd | Aircond | Pieces | 1 | 10,856.00 | 10,201.00 | 100.00 | 101.00 | 856.00 | 27.30 | 23,368.09 |

Figure 186: Stock Balance Report

11.3.21 Stock Take List

Select Attribute Group to view Stock Take List.

Stock Take List

Attribute Group ▼

Figure 187: Stock Take List Filter

The generated Stock Take List report is shown below:

| Material Stock Take List Report (Attribute : All) | | | | | | Date Stock Take : _____ | | |
|---------------------------------------------------|------------------------|-------------------------------------------------|-----------|--------|------------|-------------------------|----------------|----------|
| No | Stock Description | Stock Notes | Stock No | UOM | System Qty | Physical Qty | Variance (+/-) | Location |
| 1. | A/Cond Compressor-1 hp | | COMP1HP | Pieces | 18 | | | |
| 2. | AHU Primary Filter | | FILTER001 | Pieces | -1 | | | |
| 3. | awning 19' burg | ornder from Atlas or Dometic which ever cheaper | 18-1542 | Pieces | 0 | | | |
| 4. | Bolt | | 4567890 | Pieces | 69 | | | |
| 5. | Brass plug... | | 09876 | Litres | 299 | | | |
| 6. | dfhd | dfhdg | 100 | Pieces | 856 | | | |
| 7. | ggg | | 5 | Pieces | 0 | | | |
| 8. | Key (8 HP) | | 1382510 | Pieces | 41 | | | |

Figure 188: Stock Take List Report

11.3.22 GRN Details

Site : GoogleUSA

Report Group : [All]

- Preventive **PM Work Order List**
- Preventive **PM Work Order Status Chart**
- Work Orders **List of Pending Work Orders**
- Work Orders **Work Order by Trade Distribution Chart**
- Work Orders **Work Order by Type Distribution Chart**
- Work Orders **Work Order Details**
- Work Orders **Work Order List**
- Work Orders **Work Order Statistics (all sites)**
- Work Orders **Work Order Status Chart**
- Work Orders **Work Orders by Employees**
- Work Orders **Work Orders by Employees Chart**
- Work Orders **Work Orders by Requester**
- Purchase Order **GRN Details**
- Purchase Order **Purchase Order Details**
- Purchase Order **Purchase Request Details**

GRN Details

[Generate Report](#)

Received Date Range

From [Clear](#)

To [Clear](#)

? February, 2009 x

< < Today > >

| wk | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|----|-----|-----|-----|-----|-----|-----|-----|
| 5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 6 | 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 7 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 8 | 22 | 23 | 24 | 25 | 26 | 27 | 28 |

Select date

[Generate Report](#)

Figure 189: Goods Received Notes (GRN) Report Generator

| GRN Details [Date Range : 1 February 2009 To 21 May 2009] | | | | | | | |
|-------------------------------------------------------------|-------------------|---------|-------------------------------|--------------|---------------|--------------|------------------|
| No | GRN No | Part No | Part Description | Received Qty | Received Date | PO No | Delivery Status |
| 1. | GRNG010900001P002 | | Oil Seal | 10 | 5/18/2009 | POG010900002 | Completed |
| 2. | GRNG010900001 | | Stepper Motor Drives | 2 | 5/18/2009 | POG010900002 | Completed |
| 3. | GRNG010900002 | | Heavy Duty Pulley | 1 | 5/18/2009 | POG010900003 | Completed |
| 4. | GRNG010900003 | | 1.5m Dia x 2m ht. Water Tank | 1 | 5/18/2009 | POG010900004 | Completed |
| 5. | GRNG010900004P001 | | Ball Bearing | 20 | 5/18/2009 | POG010900001 | Partial Delivery |
| 6. | GRNG010900004P002 | | Oil Seal | 2 | 5/18/2009 | POG010900001 | Partial Delivery |
| 7. | GRNG010900004P001 | | Ball Bearing | 2 | 5/18/2009 | POG010900001 | Partial Delivery |
| 8. | GRNG010900004P001 | | Ball Bearing | 10 | 5/18/2009 | POG010900001 | Partial Delivery |
| 9. | GRNG010900005P003 | | Stepper Motor Drives | 3 | 5/18/2009 | POG010900005 | Completed |
| 10. | GRNG010900005 | | Belts & Pulleys | 4 | 5/18/2009 | POG010900005 | Completed |
| 11. | GRNG010900005 | | No Slip Positioning Belts | 1 | 5/18/2009 | POG010900005 | Completed |
| 12. | GRNG010900005 | | No Slip Positive Drive Belt | 2 | 5/18/2009 | POG010900005 | Completed |
| 13. | GRNG010900005P003 | | No Slip Sprockets | 2 | 5/18/2009 | POG010900005 | Completed |
| 14. | GRNG010900006 | | Three Core 30Amps Mains Cable | 1 | 5/18/2009 | POG010900006 | Partial Delivery |
| 15. | GRNG010900006 | | Silicon Waterproof Sealant | 2 | 5/18/2009 | POG010900006 | Partial Delivery |

To print GRN Details report,

1. Select **GRN Details** from the **Report Group** drop-down list. It will display the GRN Details report form as above.
2. Enter the date range for the report period
3. Click the **Generate Report** button.
4. The report will be generated in a new browser window.
5. Print it.
6. Close the browser window.
7. Finish.

11.3.23 Purchase Order Details

Site :

Report Group [All]

| | |
|----------------|----------------------------------------|
| Preventive | PM Work Order List |
| Preventive | PM Work Order Status Chart |
| Work Orders | List of Pending Work Orders |
| Work Orders | Work Order by Trade Distribution Chart |
| Work Orders | Work Order by Type Distribution Chart |
| Work Orders | Work Order Details |
| Work Orders | Work Order List |
| Work Orders | Work Order Statistics (all sites) |
| Work Orders | Work Order Status Chart |
| Work Orders | Work Orders by Employees |
| Work Orders | Work Orders by Employees Chart |
| Work Orders | Work Orders by Requester |
| Purchase Order | GRN Details |
| Purchase Order | Purchase Order Details |
| Purchase Order | Purchase Request Details |

Purchase Order Details

Received Date Range

From

To

February, 2009

Today

| wk | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|----|-----|-----|-----|-----|-----|-----|-----|
| 5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 6 | 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 7 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 8 | 22 | 23 | 24 | 25 | 26 | 27 | 28 |

Select date

| Purchase Order Details [Date Range : 1 February 2009 To 21 May 2009] | | | | | | | | | | |
|------------------------------------------------------------------------|------------------|---------|-------------------------------|------|-----|---------------|-------|------------|------------|--------|
| No | PO No | Part No | Part Description | UOM | Qty | Workorder No | Tax % | Discount % | Unit Price | Amaunt |
| 1. | POG010900001P001 | | Ball Bearing | Psc | 100 | | 0 | 0 | 100 | 10000 |
| 2. | POG010900001P002 | | Oil Seal | L | 2 | | 0 | 0 | 100 | 200 |
| 3. | POG010900004 | | HV Isolation Transformer | 1 | 1 | | 0 | 0 | 12 | 12 |
| 4. | POG010900003 | | Emergency Generator | 1 | 1 | G0109000019 | 0 | 0 | 11 | 11 |
| 5. | POG010900006 | | Oil based Capacitors | pcs | 6 | PMG0109000001 | 0 | 0 | 2 | 12 |
| 6. | POG010900002P002 | | Oil Seal | L | 10 | | 15 | 5 | 20 | 218.5 |
| 7. | POG010900005P003 | | 100ml Lubrication machine oil | can | 5 | PMG0109000001 | 0 | 0 | 6 | 30 |
| 8. | POG010900002 | | 5L Water based Paint | Each | 2 | PMG0109000007 | 0 | 0 | 12 | 24 |
| 9. | POG010900005 | | Tungsten Carbide Drill Bits | Each | 7 | | 0 | 0 | 3 | 21 |

To print Purchase Order Details report,

8. Select **Purchase Order Details** from the **Report Group** drop-down list. It will display the **Purchase Order** Details report form as above.
9. Enter the date range for the report period
10. Click the **Generate Report** button.
11. The report will be generated in a new browser window.
12. Print it.
13. Close the browser window.
14. Finish.

11.3.24 Purchase Request Details

Site :

Report Group [All]

- Preventive **PM Work Order List**
- Preventive **PM Work Order Status Chart**
- Work Orders **List of Pending Work Orders**
- Work Orders **Work Order by Trade Distribution Chart**
- Work Orders **Work Order by Type Distribution Chart**
- Work Orders **Work Order Details**
- Work Orders **Work Order List**
- Work Orders **Work Order Statistics (all sites)**
- Work Orders **Work Order Status Chart**
- Work Orders **Work Orders by Employees**
- Work Orders **Work Orders by Employees Chart**
- Work Orders **Work Orders by Requester**
- Purchase Order **GRN Details**
- Purchase Order **Purchase Order Details**
- Purchase Order **Purchase Request Details**

Purchase Request Details

Generate Report

Received Date Range

From

To

? February, 2009 x

< < Today > >

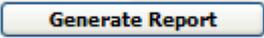
| wk | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|----|-----|-----|-----|-----|-----|-----|-----|
| 5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 6 | 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 7 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 8 | 22 | 23 | 24 | 25 | 26 | 27 | 28 |

Select date

Generate Report

| Purchase Request Details [Date Range : 1 February 2009 To 21 May 2009] | | | | | | | | |
|--------------------------------------------------------------------------|--------------|---------|----------------------------------|------|-----|---------------|-----------------------|-----------------|
| No | PR No | Part No | Part Description | UOM | Qty | Workorder No | Purchase Order Status | Approved Status |
| 1. | PRG010900001 | P001 | Ball Bearing | Psc | 100 | | Fully Ordered | Approved |
| 2. | PRG010900003 | P002 | Oil Seal | L | 10 | | Fully Ordered | Approved |
| 3. | PRG010900002 | P001 | Ball Bearing | Psc | 10 | PMG0109000006 | None | Approved |
| 4. | PRG010900006 | P003 | Oil Filters | T | 5 | PMG0109000001 | Fully Ordered | Approved |
| 5. | PRG010900005 | | 5 Ltr Oil Cleansing Detergent | l | 1 | G0109000019 | Fully Ordered | Approved |
| 6. | PRG010900004 | P002 | Oil Seal | Unit | 5 | | None | Approved |
| 7. | PRG010900004 | | Stainless Steel Door Frames | Each | 2 | PMG0109000007 | Fully Ordered | Approved |
| 8. | PRG010900007 | | Non-Conductive Electrostatic Mat | pcs | 6 | PMG0109000001 | Fully Ordered | Approved |
| 9. | PRG010900006 | | Glossy Bathroom Tiles | Pack | 7 | | Fully Ordered | Approved |

To print Purchase Request Details report,

15. Select **Purchase Request Details** from the **Report Group** drop-down list. It will display the **Purchase Request** Details report form as above.
16. Enter the date range for the report period
17. Click the  button.
18. The report will be generated in a new browser window.
19. Print it.
20. Close the browser window.
21. Finish.

12. MASTER



ACCESSING THE MASTER LIST

You can access **Master list** on **CWorks EASY opening screen** by clicking the **Master icon** on the left, which will open the **Master screen**.

Frequently used codes and descriptions are recorded here for quick lookup by users. This module captures all your basic maintenance data, required by CWorks EASY.

12.1 Master Opening Screen

MASTER Welcome Elias Ishak
Seconds before redirect: 1188

General Masters First Line Fix

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

New Department

Department Sitecode:

Department Number:

Department Description:

Departments List

| # | Department Code | Department Description | Site |
|----|-------------------|---------------------------|-----------------|
| 1 | EMSNJ-ADM | Administration | Emerson Nanjing |
| 2 | EMSNJ-DMC | DMC Department | Emerson Nanjing |
| 3 | EMSNJ-FIN | Finance Department | Emerson Nanjing |
| 4 | EMSNJ-GMO | General Manager Office | Emerson Nanjing |
| 5 | EMSNJ-HR | Human Resource Department | Emerson Nanjing |
| 6 | EMSNJ-IT | IT Department | Emerson Nanjing |
| 7 | EMSNJ-Maintenance | Maintenance Department | Emerson Nanjing |
| 8 | EMSNJ-MMI | MMI Department | Emerson Nanjing |
| 9 | EMSNJ-OMD | Order Management | Emerson Nanjing |
| 10 | EMSNJ-QD | Quality Department | Emerson Nanjing |
| 11 | EMSNJ-RFD | RFD Department | Emerson Nanjing |
| 12 | EMSNJ-SCM | Supply Chain Department | Emerson Nanjing |

Please click on the link to update

Figure 190: The Master Opening Screen

Listed below are short description of each **tab** in the **Master**:

1. **Department Tab**

Hold the list of **department numbers** and their **descriptions**. You register new departments here. In the Cworks EASY CMMS, where an entry form requires a

department is as input, these departments will appear in the form of a drop-down list. All the user need to do is select a department from the list.

2. **Level Tab**

Gives you the option to set up and organize some or all of the sites into **hierarchical structure**.

3. **Site Tab**

Hold the list of **Site numbers** and their **descriptions**.

The Site Numbers and their descriptions will appear as a drop-down list wherever you need to select an input.

4. **Failure Cause Tab**

Hold the list of all **failure codes** for assets and equipment.

You can create and add new **Failure codes** here.

By adding a failure code for each **type of breakdown, malfunctions** and **stoppages** you will be able to display them as statistical plots, pie-charts, etc.

5. **Remedy Tab**

What does Remedy do?

6. **Asset Category Tab**

Hold the list of all **asset and equipment categories**. In this way, you have a meaningful way of grouping asset and equipment of similar functions, for example **SENSORS** category covers all kinds of sensors such as pressure sensors, heat sensors and vibration sensors, just to name a few.

The *asset categories* will appear as a drop-down list in CWorks EASY operation.

7. **BOM List Tab**

Hold the list of all **Spare Part numbers and descriptions**. The list is use to select one or more spare part items (as a drop-down list) during the course of a normal routine maintenance and service operation.

The *Spare Part numbers and descriptions* will appear as a drop-down list in CWorks EASY operation.

8. **Supplier Tab**

Hold the list of all **supplier and contractor numbers**, their names, business addresses

and complete business details as shown in **Error! Reference source not found..** They should be registered in this list if they have an active role in the maintenance of your facilities. The *supplier* and *contractor numbers* will appear as a drop-down list in EASY operation.

9. **Cost Center Tab**

Hold the list of all **cost center codes or numbers**. It will be used for assigning cost for a routine maintenance job, for Purchase Orders billing and for miscellaneous accounting purposes. The *cost center codes* or *numbers* will appear as a drop-down list in EASY operation.

It is worth considering using the department field for this as it is linked to every Asset. Thus, it could be better suited to tracking costs/commitments per Account Code/Cost Center.

10. **Account Code Tab**

Hold the list of all **account codes or numbers**. In practice, each cost centre could have many accounts. These account numbers or codes should be in this list. These account numbers or codes will appear as a drop-down list; anywhere they are required as an input.

11. **Currency Tab**

Hold the list of all **base currencies** and their corresponding symbols.

This is where you can register your new base currencies and their symbols.

These currencies are use for costing hourly labor charges, prices of spare parts, service charges, etc. All base currencies should be entered in this list. The base currencies will appear as a drop-down list in EASY operation.

12. **Job Plan Tab**

Hold the list of all **job plans**.

You can register all new job plans in the CMMS here. The job plans will appear as a drop-down list in EASY operation.

13. **Safety Instruction Tab**

Hold the list of all **safety instructions**.

You can register all new *safety instructions* here. *Safety instructions* are very much a part of a Job Plan but related to lock-outs/vessel entry etc. The *safety instructions* will appear as a drop-down list in EASY operation.

14. PC Code Tab

Hold the list of all **PC codes**.

You can register all new **PC codes** here.

15. Cleaning Weightage Tab

What is going into here???

16. Location Inventory Tab

Hold the list of all **Location Inventory**.

You can register all new Location Inventory here.

17. Craft Tab

Listing of all Crafts.

18. Logo Tab

You can upload a *corporate* or *business* logo file here. The file can be any of these formats: gif, jpg, jpeg, png and bmp. However, you can upload only one logo file at anytime (only one is allowed). Uploading another logo file will replace the existing logo.

The CMMS will display your uploaded logo file at the top left hand corner of your login screen, on the Work Order print form, and on the left hand corner of the EASY menu.

19. Miscellaneous Tab

This tab holds an assortment of common technical terms, status, constant values, etc., that are use by the CMMS. You can add all relevant information here.

12.2 How to Create Master Data

This is where you enter all the master data.

There are nineteen tabs on the master screen. Each corresponds to one aspect of the maintenance component deployed in the EASY.

12.2.1 Master List: Adding New Departments

Adding a new department is straight forward as shown by the form below.

New Department

Department Sitecode Select Site ▼

Department Number

Department Description

Departments List

| # | Department Code | Department Description | Site |
|---|------------------|------------------------|-----------------|
| 1 | EMSJN-ADM | Administration | Emerson Nanjing |
| 2 | EMSJN-DMC | DMC Department | Emerson Nanjing |
| 3 | EMSJN-FIN | Finance Department | Emerson Nanjing |

| Fields | Description |
|------------------------|----------------------------------------------|
| Department Sitecode | Site Name or ID it belongs to or located in. |
| Department Number | A unique number assigned to a department |
| Department Description | A name assigned to a department. |

1. Click **Department tab** as shown below and you should see the form above.
2. Fill in the appropriate details and click **Save**.
3. You should see it in the list underneath the form shortly.
4. Finish.

To edit any of the department in the listing, click on the **Department Code link**.

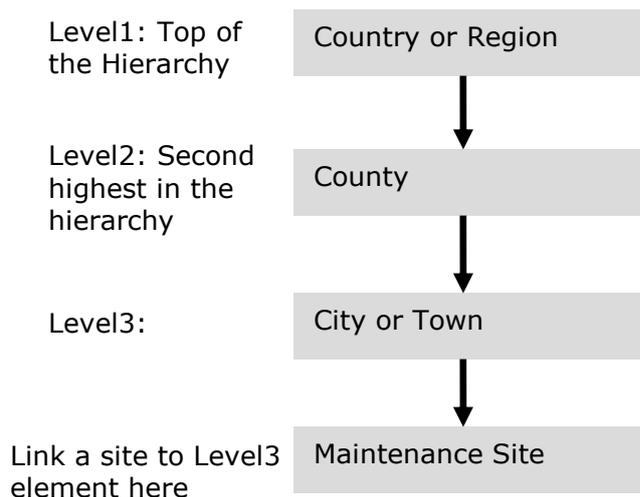
12.2.2 Master List: Adding Levels

Please skip this section if you do not organize maintenance sites in a hierarchy. Otherwise, please read on.

This functionality is **optional**. Whether you organize your sites in a **hierarchy** or not is entirely your decision. However, this facility is available if you need it, and you can completely **ignore it** if you do not.

Some corporations and companies prefer to organize maintenance sites in a **hierarchy**. The element at Level1 is considered as the top of the hierarchy. The elements on Level2 are at the second highest and the elements on Level3 are considered as at the third highest (also the lowest) in the hierarchy respectively.

A set of elements form a complete three-level of hierarchical when they take the form shown below.



After a set of elements form a complete three-level of hierarchical, have been created, link each site in turn to the elements on level3. (See how to link an element at a time in section: **Master -> Adding New Sites**)

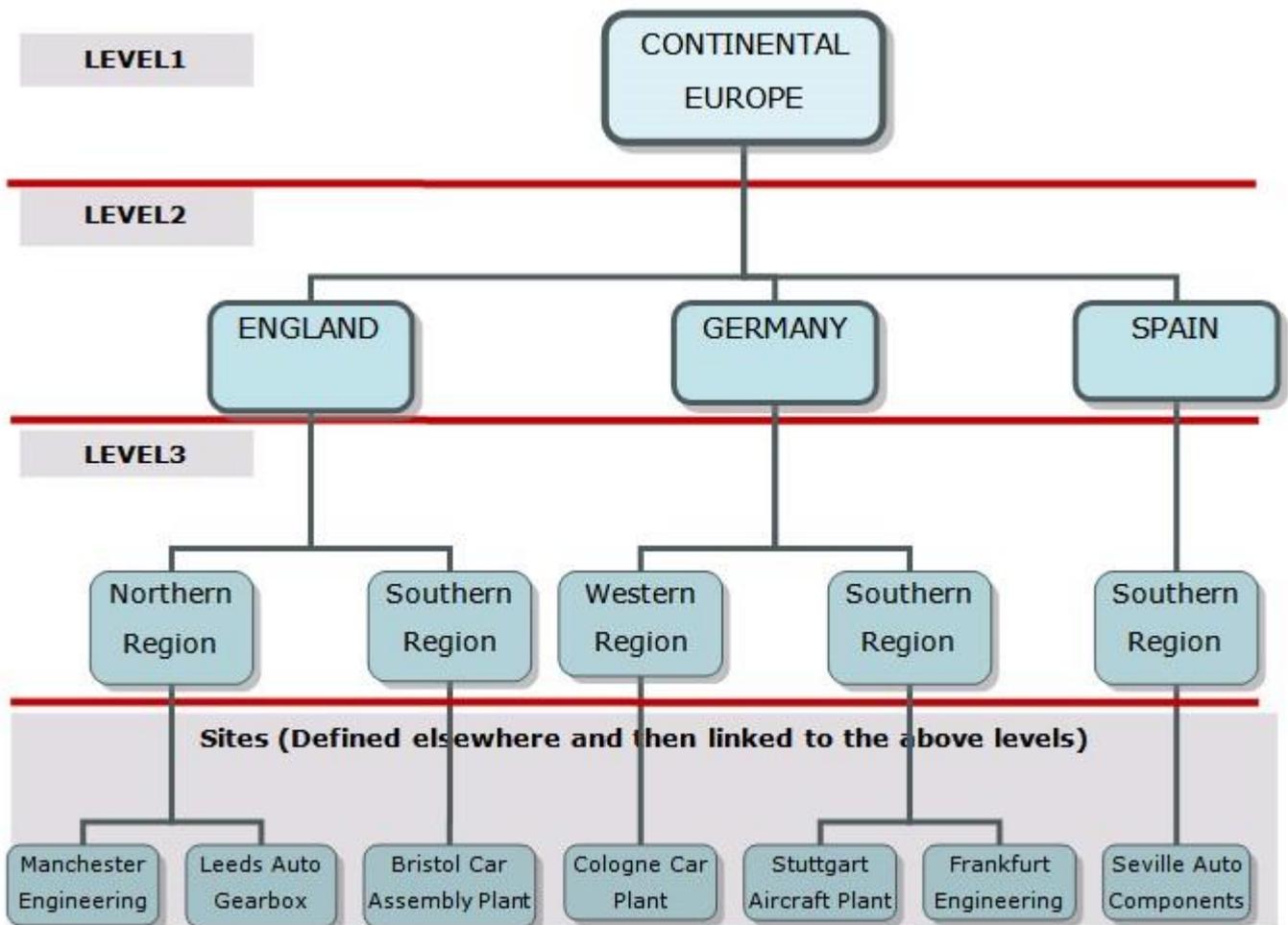
This EASY section describes how to add each level. It also explains how to visualize the **levels** and the sites as a **hierarchy**. After understanding this idea, you should be able to divide and organize your sites into hierarchy.

IMPORTANT POINT TO REMEMBER

When creating the levels that forms the hierarchy, you must define all the three levels. You cannot leave any level blank. This is a mandatory requirement.

The basic idea is to visualize the three levels as positioned above all the sites. Effectively, these sites will be underneath Level3 as shown below, once the hierarchy and the sites are linked via a setting.

In a hierarchy, **Level1** is viewed as the first highest level, whereas **Level2** is the second highest level and **Level3** is the lowest level in the whole hierarchy. A site is added to the lowest level by linking the selected level3 with the site.



| | | | | | | | | | |
|------------|--------------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Levels

| | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Level 1</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p>Rename selected Add new</p> <input style="width: 80%;" type="text"/> <input type="button" value="Add"/> | <p>Level 2</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p>Rename selected Add new</p> <input style="width: 80%;" type="text"/> <input type="button" value="Add"/> | <p>Level 3</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p>Rename selected Add new</p> <input style="width: 80%;" type="text"/> <input type="button" value="Add"/> |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Levels refers to **hierarchical levels** used in organizing locations into (location) **hierarchies**.

They are created as the upper level to the site code. For example

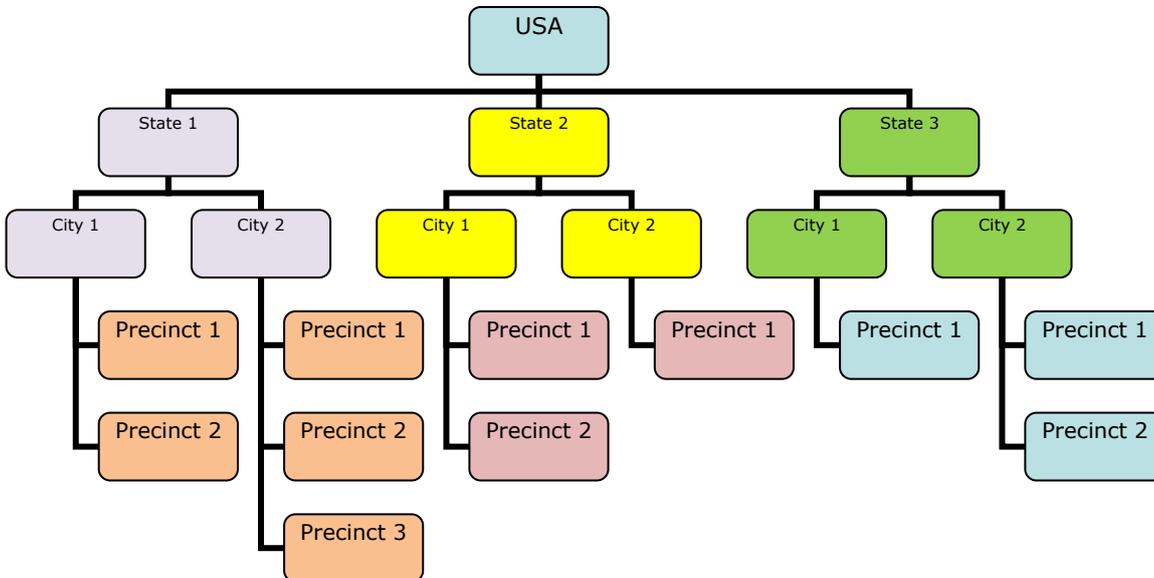
- Level 1: Country (e.g.: Malaysia, United States)
- Level 2: State (e.g.: Selangor, Ohio)
- Level 3: City/Town (e.g.: Serdang, Cincinnati)

This function can be implemented if a client requires more filters for the location hierarchy. It is not necessary to be implemented and can be left empty.

| THE ORDER OF THE HIERARCHICAL LEVELS | | | |
|--------------------------------------|----------------------|----------|---------------------|
| (FROM THE HIGHEST TO THE LOWEST) | | | |
| | LEVEL 1 (HIGHEST) | LEVEL 2 | LEVEL 3 (LOWEST) |
| Example of Hierarchies | United States | Ohio | Cincinnati |
| | Malaysia | Selangor | Serdang |
| | Grand Parents | Parents | Child1 |
| | | | |

In order to organize your sites in hierarchical form, first define the **highest hierarchical level** in Level 1, the second highest level in Level 2 and the third highest level in Level 3. For e.g., you could create a hierarchy for your list of maintenance sites by states, and each state is divided into

cities and towns, and these are divided into districts or precincts. The diagram below shows this hierarchical organization. This is just one way to organize this. You could organize your maintenance facilities in another logical way.



12.2.3 Master List: Adding New Sites

Administrators can specify time zones for individual sites. Specifying a **time zone** is **mandatory** before starting EASY as all date/time fields, generated by the system, are based on time zones specified for a particular site.

The **time zones** are defined according to **Greenwich Mean Time (GMT)**. The determination of the **time zone** for a **site** is dependant on the region of the earth in which it is located. For example,

- Kuala Lumpur, Malaysia is **GMT+8(Hrs)**
- London is **GMT+0(Hrs)**
- New York City is **GMT-4(Hrs)**

Note that Daylight Savings Time (DST) must be considered and manually adjusted in the Site master as EASY does not automatically adjust for DST.

Add/Edit Site

Level 3

Site Code

Site Name

Timezone

Supervisor ID

Fax

Currency Symbol

Site List

| # | Level | Site | Supervisor | Fax | Timezone | Curr. |
|---|-------|------------------------------|------------|------------------|---------------|-------|
| 1 | | EMSNJ Emerson Nanjing | | | Asia/Shanghai | MYR |
| 2 | | s s | | | | |
| 3 | | S001 Cworks Malaysia | | | Malaysia Time | |
| 4 | | S002 Japan | DR | 0322312121 Japan | | MYR |

Please click on the link to update

| Fields | Description |
|-----------------|----------------------------------------------------------------|
| Level 3 | |
| Site Code | A unique number assigned to a site |
| Site Name | A description of the site. |
| Timezone | Select a standard world time zone for this site (based on GMT) |
| Supervisor ID | ID of the site's supervisor. |
| Fax | Fax number of the site. |
| Currency Symbol | Currency used by the site |

Here are the steps to add a new site:

1. Click **Site Tab**.
2. Fill in the appropriate details.
3. Select the currency to be the **base currency** for this site.
 Note: This is where you set the base currency.
4. Click **Save**.
5. Finish.

To edit any of the sites in the listing, click on its **site name** in the listing.

12.2.4 Master List: Adding New Failure Causes

The screenshot shows a web interface for adding a new failure code. It consists of two main sections: a form for adding a new code and a table listing existing codes.

New Failure Code Form:

- Failure Code:** A text input field.
- Failure Description:** A larger text input field.
- Buttons:** 'Save' and 'Cancel' buttons.

Failure Code List Table:

| # | Failure Code | Failure Description |
|---|--------------|----------------------------------|
| 1 | F001 | Inadequate Design 0000 |
| 2 | F002 | Substandard Manufacturing 000000 |

| Fields | Description |
|---------------------|---------------------------------------|
| Failure Code | A unique number assigned to a failure |
| Failure Description | Description of failure |

Here are the steps to add a new Failure Code:

1. Click **Failure Code Tab**.
2. Fill in appropriate detail and click **Save**.
3. Finish.

To edit any of the codes in the listing, click its corresponding number.

12.2.5 Master List: Adding New Remedies

The screenshot shows a web interface for adding a new remedy code. It consists of two main sections: a form for adding a new code and a table listing existing codes.

New Remedy Code Form:

- Remedy Code:** A text input field.
- Remedy Description:** A larger text input field.
- Buttons:** 'Save' and 'Cancel' buttons.

Remedy Code List Table:

| # | Remedy Code | Remedy Description |
|---|-------------|------------------------------------|
| 1 | R001 | Calibrate / Adjust 00 |
| 2 | R002 | Check / Inspect / Test 00 / 00 |
| 3 | R003 | Clean / Wash / Polish 00 / 00 / 00 |

Here are the steps to add a new Remedy Code:

1. Click **Remedy Tab**.
2. Fill in appropriate detail and click **Save**.

3. Finish.

To edit any of the codes in the listing, click on the code.

12.2.6 Master List: Asset Categories

12.2.6.1 Add New Asset Categories

The screenshot shows a software interface for adding new asset categories. It consists of two main sections: a form for creating a new category and a table listing existing categories.

New Asset Category Form:

- Category Code:** A text input field.
- Category Description:** A larger text input field.
- Buttons:** 'Save' and 'Cancel' buttons are located below the description field.

Asset Category List Table:

| # | Category Code | Category Description |
|---|------------------|-----------------------------------|
| 1 | B&MRE | Business & Meeting Room Equipment |
| 2 | CV-BS | CIVIL - BUILDING / STRUCTURE |
| 3 | CV-SD | CIVIL - SEWERAGE/ DRAINAGE |
| 4 | CV-WST | CIVIL - WATER SUPPLY & TREATMENT |

Figure 191: Asset Category

| Fields | Description |
|----------------------|----------------------------------------|
| Category Code | A unique number assigned to a category |
| Category Description | A name assigned to a category. |

To add a new Asset Category the steps are:

1. Click **Asset Category Tab**.
2. Fill in the appropriate detail and click **Save**.
3. Finish.

12.2.6.2 Edit Existing Asset Categories

New Asset Category

Category Code **B&MRE**

Category Description 办公室及会议室设备 Business & Meeting Room Equipment

Asset Category List

| # | Category Code | Category Description |
|---|------------------|-----------------------------------|
| 1 | B&MRE | Business & Meeting Room Equipment |
| 2 | CV-BS | CIVIL - BUILDING / STRUCTURE |
| 3 | CV-SD | CIVIL - SEWERAGE/ DRAINAGE |
| 4 | CV-WST | CIVIL - WATER SUPPLY & TREATMENT |

Here are the steps to edit existing asset category:

1. Click **Asset Category Tab** to see the listing of all **Asset Categories**.
2. Click on the **category code** you would like to edit and the CMMS will open it for editing as shown above.

3. Edit **Category Description** and click .

Note: Clicking will put the form into create a New Asset Category.

4. Finish.

12.2.7 Master List: Adding New BoM Lists

Note: After you create a BoM, you cannot delete it even when it is empty. However, you can add or delete parts from it.

New Bill Of Material

BOM Number

BOM Description

Bill Of Material List

| # | BOM Number | BOM Description |
|---|-------------|--------------------|
| 1 | B001 | BOM1 |
| 2 | B002 | Bill of Material 2 |
| 3 | B003 | Bill of Material 3 |

Please click on the link to update

Figure 192: Adding a New BoM

| Fields | Description |
|-----------------|---------------------------------|
| BOM Number | A unique number |
| BOM Description | Description of bill of material |

Here are the steps to create a new BOM:

1. Click **BOM List Tab**.
2. Fill in the appropriate BOM Number and BOM Description.
3. Click **Save**.
4. Finish.

12.2.7.1 Adding parts to a BOM

Here are the steps to add parts to a BOM:

1. Click **BOM List Tab**.

2. From the listing of BOMs as shown below,

| Bill Of Material List | | |
|-----------------------|-------------|---------------------|
| # | BOM Number | BOM Description |
| 1 | B001 | BOM1 |
| 2 | B002 | Bill of Material 2 |
| 3 | B003 | Bill of Material 3 |
| 4 | B004 | Bill of Materials 4 |

Please click on the link to update

click on the BOM Number to open it for editing as shown below.

| New Bill Of Material | | | |
|-----------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| BOM Number | B004 | | |
| BOM Description | Bill of Materials 4 | | |
| | <input type="button" value="Update"/> | <input type="button" value="Cancel"/> | |
| Parts# | <input type="text"/> | <input type="text"/> | <input type="button" value="..."/> |
| Quantity | <input type="text"/> | <input type="button" value="Save"/> | <input type="button" value="Cancel"/> |
| Part No | Part Description | Quantity | Action |
| Bill Of Material List | | | |
| # | BOM Number | BOM Description | |
| 1 | B001 | BOM1 | |
| 2 | B002 | Bill of Material 2 | |
| 3 | B003 | Bill of Material 3 | |
| 4 | B004 | Bill of Materials 4 | |

Please click on the link to update

3. Edit the BOM description if required and click **Update button** to save the changes.
4. Begin adding each part by opening the part list via the ellipsis button .
5. Fill in the **Quantity** field, which represent total number of parts to add to the BOM.
6. Click **Save** to add the part to the Part list. However, if you decided to abort adding the part, click **Cancel**, the CMMS will discard the part.

Note: Previously saved part is unaffected by the cancellation.

7. Deleting Existing Parts in a BOM

You can remove previously added parts (shown on the list) by clicking the **Remove** link that is on the same line as the part(see below).

New Bill Of Material

BOM Number **B001**

BOM Description **BOM1**

Parts#

Quantity

| Part No | Part Description | Quantity | Action |
|---------|------------------|----------|--------|
| P002 | Part 002 | 1 | Remove |
| P001 | Bearing | 2 | Remove |
| P003 | Oil Seal | 2 | Remove |
| P004 | Gasket | 2 | Remove |

Bill Of Material List

| # | BOM Number | BOM Description |
|---|------------|--------------------|
| 1 | B001 | BOM1 |
| 2 | B002 | Bill of Material 2 |
| 3 | B003 | Bill of Material 3 |

Please click on the link to update

8. Finish.

12.2.8 Master List: Suppliers

12.2.8.1 Add New Supplier

Site : **Emerson Nanjing** ▼

Supplier List

Add a Supplier / Contractor

| # | Supplier Number | Supplier Name | Services |
|----|-----------------|----------------------------------|-----------------------------------------------------------|
| 1 | S001 | Craft Metal Works | |
| 2 | S002 | Harmonic Storm Solution Ltd. | Industrial Corrosion Prevention and Treatments Specialist |
| 3 | S003 | Omega Enterprise | |
| 4 | S006 | Gamuda Berhad | Broad Category of Industrial Plant Services |
| 5 | S | Gardon Marks | Biometric Equipment Sales and Calibration Services |
| 6 | S11 | ADCO Jeramin Corp. | Engineering Cables Supplier |
| 7 | S15 | Johnsons Intelligent Systems | Heavy Portable Lifting Equipments |
| 8 | S005 | Libermann Industrial Compressors | Sales, Services and repairs of Compressors and pumps |
| 9 | TR0001 | T & R Enterprise | |
| 10 | Q1212 | Try Q12121 | |
| 11 | F1112 | Supplier F | |

Please click on the link to update

Figure 193: Master: Suppliers Screen

| Fields | Description |
|------------------|-------------------------------------------------------------------------|
| Supplier Number | A unique supplier Identification number assigned by you for your system |
| Supplier Name | The Supplier's name |
| Contact Person | Name of a person |
| Designation | Designation of the above persons |
| Services | Type of services offered by this contractor |
| Category | Set Supplier's service Category. Select from a drop-down list. |
| Central Supplier | Tick if true. |

| | |
|----------------|------------------------------------------------|
| Address | Supplier's postal or company office address |
| City | City name |
| Post/Zip code | Postcode |
| State/Province | State name |
| Country | Country name |
| phone | Supplier's telephone number |
| Fax | Supplier's fax number |
| Email | Email contact |
| Supplier List | All the suppliers/contractors in your database |

Here are the steps to add new Suppliers:

1. Click **Suppliers Tab**  to open the **Suppliers screen** of **Figure 193**.
2. Click the link shown below



to open a blank new supplier form below.

Site : Emerson Nanjing ▼

Add / Update Supplier

Supplier Number Address

Supplier Name

Contact Person

Designation City

Services Post / Zip Code

State / Province

Country

Category Phone

Central Supplier Fax

Email

Supplier List

Add a Supplier / Contractor

| # | Supplier Number | Supplier Name | Services |
|---|-----------------|------------------------------|-----------------------------------------------------------|
| 1 | S001 | Craft Metal Works | |
| 2 | S002 | Harmonic Storm Solution Ltd. | Industrial Corrosion Prevention and Treatments Specialist |

- Fill in the supplier Number, supplier Name, Contact Person, Designation, Services, Category, checkmark Central Supplier tick box if applicable, address, city, Post/Zip Code, State/Province, Country, Phone, Fax, and Email.
- Click **Save** and the CMMS will add the new supplier to the listing at the bottom of the form.
- Finish.

12.2.8.2 Edit Existing Suppliers

To edit **existing supplier** detail, the steps are:

- Click **Suppliers Tab** and you will see the form of **Figure 193** above.

- In suppliers listing, click on the supplier number you want to modify and the CMMS will open it for editing as shown below.

Site : Emerson Nanjing

Add / Update Supplier

Supplier Number: **S15** Address: 120 Scycamore Road

Supplier Name: Johnsons Intelligen

Contact Person: Mike Doolen

Designation: General Assistance City:

Services: Heavy Portable Lifting Equipments Post / Zip Code:

State / Province:

Country:

Category: Supplier Phone:

Central Supplier: Fax:

Email:

Services Details

| Name | Rate | Options |
|------|------|------------|
| | | Add |

- Add services and their corresponding rate one at a time via the **Add** button.
- Edit any of the details on the supplier as required.
- Click **Update** to save the changes. On the other hand, to abort changes and return to the listing screen click **Cancel**.
- Finish.

12.2.9 Master List: Adding New Cost Centers

12.2.9.1 Add new Cost Centers

The screenshot shows a web interface for adding a new cost center. It consists of two main sections: a form for adding a new cost center and a table listing existing ones.

New Cost Centre Form:

- Cost Centre Number:
- Cost Centre Description:
- Buttons:

Cost Centre List Table:

| # | Cost Centre Number | Cost Centre Description |
|---|--------------------|-------------------------|
| 1 | C01 | account |
| 2 | C02 | Account2q |

Below the table, there is a text prompt: "Please click on the link to update".

Figure 194: Adding New Cost Center form

Here are the steps to add new Cost Centre:

1. Click the Cost Centre tab  and you will get the form shown in **Figure 194**.
 2. Fill in the appropriate details and click .
- Note: Clicking  will clear both input fields.
3. The new cost center will immediately appear in the listing.
 4. Finish.

12.2.9.2 Edit Existing Cost Centers

To edit existing **cost center**, the steps are:

1. Click the Cost Centre tab  and you will get the form shown in **Figure 194**.

- In the listing of Centre Center, click on the Cost Center Number to edit it. You will see the form below, however, the **Save button** has changed to **Update button**:

New Cost Centre

Cost Centre Number C02

Cost Centre Description

Cost Centre List

| # | Cost Centre Number | Cost Centre Description |
|---|--------------------|-------------------------|
| 1 | C01 | acount |
| 2 | C02 | Account2q |

Please click on the link to update

- Edit the description details accordingly.
- Click to save your changes.
- Finish.

12.2.10 Master List: Account

12.2.10.1 Adding New Account

New Account Code

Cost Centre Number

Acc. Code

Acc. Code Description

Account Code List

| # | Account Code | Account Code Description | Cost Centre |
|---|--------------|--------------------------|-------------|
| 1 | ACC1 | Admin | C01 |
| 2 | ACC2 | CODE21 | C01 |
| 3 | ACC3 | Account 3 | C02 |

Please click on the link to update

Figure 195: New Account Form

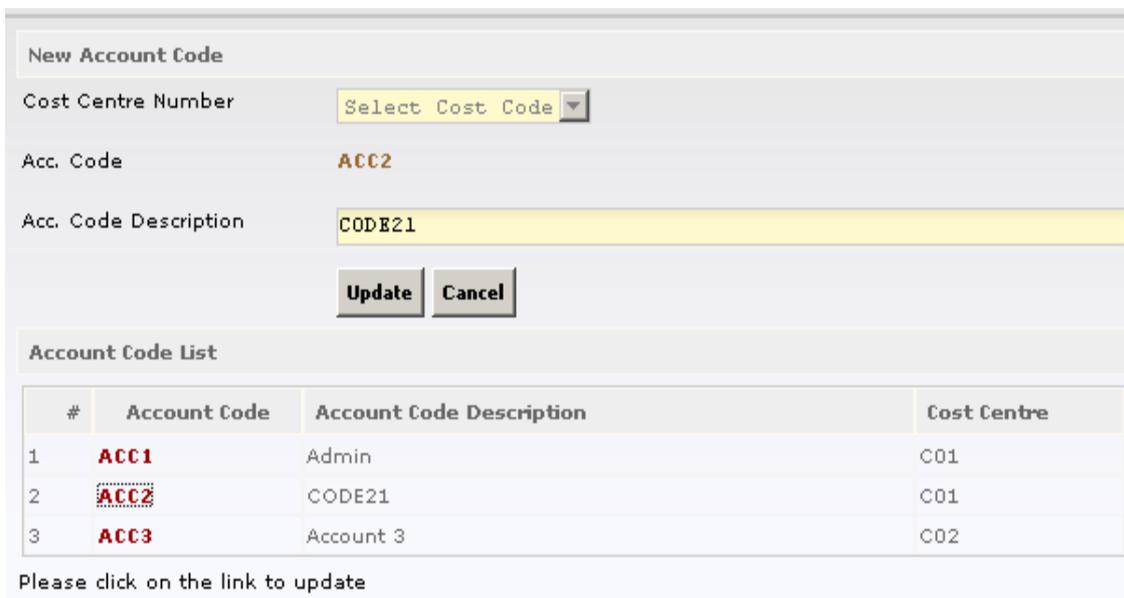
Here are the steps to add new account:

1. Click **Account Code tab**  shown above and you get the form of **Figure 195**.
 2. Fill in the details and click  .
You should see it in the **Account Code listing** immediately.
- Note:  clears the input fields.
3. Finish.

12.2.10.2 Edit Existing Account

To edit Account Code, the steps are:

1. Click **Account Code tab**  above and you get the form shown in **Figure 195**.
2. In the Account Code Listing below, click the Account Code to you want edit it and the CMMS will open it as shown below for editing.



The screenshot shows a web interface for editing an account code. At the top, there are two tabs: 'Cost Centre' and 'Account Code', with 'Account Code' being the active tab. Below the tabs is a form titled 'New Account Code'. The form has three input fields: 'Cost Centre Number' with a dropdown menu showing 'Select Cost Code', 'Acc. Code' with the value 'ACC2', and 'Acc. Code Description' with the value 'CODE21'. Below these fields are two buttons: 'Update' and 'Cancel'. Below the form is a section titled 'Account Code List' containing a table with the following data:

| # | Account Code | Account Code Description | Cost Centre |
|---|--------------|--------------------------|-------------|
| 1 | ACC1 | Admin | C01 |
| 2 | ACC2 | CODE21 | C01 |
| 3 | ACC3 | Account 3 | C02 |

Below the table, there is a text prompt: 'Please click on the link to update'.

3. Edit the description field as appropriate.

4. Click  to save your changes.

Note: Clicking  will change the form into add new **Account Code**.

5. Finish.

12.2.11 Master List: Currency

First and foremost, we recommend that you submit the **base currency** before you enter and create any currency code for a site. After that, adding other currency codes with the conversion rate to the base currency becomes simpler.

Note: You can only have one base currency.

Creating the base currency only requires that you to set the conversion rate to 1 (one).

12.2.11.1 Adding New Currency

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|-----------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Currency Base on 1

Symbol : Currency Rate :

| # | Symbol | Currency Rate |
|---|------------|---------------|
| 1 | MYR | 3.2362 |
| 2 | USD | 1.0000 |

Figure 196: Adding New Currency

Here are the steps to add new **currency**.

1. Click **Currency tab**   to display the form shown in Error! Reference source not found..
2. Fill in the **currency symbol**.

3. If this is the **Base Currency**, fill in the conversion rate as **1 (one)**. Otherwise, fill in the **conversion rate** (based on current exchange rate).
4. Click . You should see it appears in the listing.
5. Finish.

12.2.11.2 Edit Existing Currency

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|-----------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Currency Base on 1

Symbol : Currency Rate :

| # | Symbol | Currency Rate |
|---|----------------|---------------|
| 1 | MYR | 3.2362 |
| 2 | USD | 1.0000 |

Figure 197: Edit Existing Currency

Here are the steps to edit existing **currency**.

1. Click **Currency tab**   to display the form shown in Error! Reference source not found..
2. In the listing of currencies, click on the **currency symbol** you want to change. The CMMS will load the currency into the editing form as shown in **Figure 197**.
3. Edit **Currency Rate** accordingly.
4. Click  to save the changes.
5. Finish.

The table below shows the currency symbols for most countries around the world.

| Currency | SYMBOL | Currency | SYMBOL |
|------------------------|--------|----------------------------|--------|
| American Dollar | USD | Kuwaiti Dinar | KWD |
| Argentine Peso | ARS | Latvian Lats | LVL |
| Australian Dollar | AUD | Libyan Dinar | LYD |
| Bahraini Dinar | BHD | Lithuanian Litas | LTL |
| Botswana Pula | BWP | Malaysian Ringgit | MYRM |
| Brazilian Real | BRL | Maltese Lira | MTL |
| British Pound Sterling | GBP | Mauritius Rupee | MUR |
| Brunei dollar | BND | Mexican Peso | MXN |
| Bulgarian Lev | BGL | Nepalese Rupee | NPR |
| Canadian Dollar | CAD | New Zealand Dollar | NZD |
| Chilean Peso | CLP | Norwegian Kroner | NOK |
| Chinese Yuan | CNY | Omani Rial | OMR |
| Colombian Peso | COP | Pakistan Rupee | PKR |
| Croatian Kuna | HRK | Philippine Peso | PHP |
| Czech Koruna | CZK | Polish Zloty | PLN |
| Danish Krone | DKK | Qatari Rial | QAR |
| Djibouti Franc | DJF | Romanian Leu | RON |
| Dominican Peso | DOP | Russian Ruble | RUB |
| East Caribbean Dollar | XCD | Saudi Riyal | SAR |
| Egyptian Pound | EGP | Singapore Dollar | SGD |
| El Salvador Colon | SVC | South African Rand | ZAR |
| Euro | EUR | South Korean Won | KRW |
| Gibraltar Pound | GIP | Sri Lanka Rupee | LKR |
| Hong Kong Dollar | HKD | Swedish Krona | SEK |
| Hungarian Forint | HUF | Swiss Franc | CHF |
| Iceland Krona | ISK | Syrian Pound | SYP |
| Indian Rupee | INR | Taiwan Dollar | TWD |
| Indonesian Rupiah | IDR | Thai Baht | THB |
| Iranian Rial | IRR | Trinidad/Tobago Dollar | TTD |
| Iraqi Dinar | IQD | Turkish Lira | TRL |
| Jamaican Dollar | JMD | United Arab Emirate Dirham | AED |
| Jordanian Dinar | JOD | Venezuelan Bolivar | VEB |
| Japanese Yen | YEN | Vietnamese Dong | VND |
| Kenyan Shilling | KES | | |

Table 1: Table of most Countries Currency Symbols

12.2.12 Master List: Job Plans

12.2.12.1 Adding NewJob Plans

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|-----------------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Add / Update

Number

Name

Description

List Click on an item link to update

| # | Number | Name |
|---|-----------------|-------------------------------------------------|
| 1 | JP001 | Job Plan 001 |
| 2 | JPLN0012 | CLEANING AIR FILTER FOR AIR CONDITION UNIT |
| 3 | s | Inspect the bearings on unit for wear and tear. |

Figure 198: New Job Plan Form

Here are the steps to add a new **Job Plan**:

1. Click **Job Plan tab**  to display the form in **Figure 198** above.
2. Fill in Number, Name and Description.
3. Click . You should see appear in the listing.

Note:  will clear all the fields.

4. Finish.

12.2.12.2 Edit Existing Job Plans

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Add / Update

Number **JPLN0012**

Name **CLEANING AIR FILTER FOR AIR CONDITION UNIT**

Description **(Edit)**

1. Switch off electrical power to the air condition unit. Unplug the power cord.
2. Remove the cover at the back.
3. Gently undo the four screws for the air filter fixing frame.
4. Thoroughly use the air pump to clean the air filter.
5. Install the filter back into the air condition unit.
6. Screw back the unit using the four screw.
7. Place the cover back on the unit.
8. Plug the power cord. Switch the air condition unit back on.
9. Finish.

List Click on an item link to update

| # | Number | Name |
|---|-----------------|-------------------------------------------------|
| 1 | JP001 | Job Plan 001 |
| 2 | JPLN0012 | CLEANING AIR FILTER FOR AIR CONDITION UNIT |
| 3 | s | Inspect the bearings on unit for wear and tear. |

Figure 199: Edit Existing Job Plans

Here are the steps to edit a **Job Plan**:

1. Click **Job Plan tab**  to display the form in **Figure 198** above.
2. Click on the **Job Plan number** and the CMMS will open it for editing as shown in **Figure 199**.
3. Edit Name, Description fields accordingly.
4. Click to save your changes.

Note: Clicking will return you to adding new Job Plan Number.

5. Finish.

12.2.13 Master List: Safety Instructions

12.2.13.1 Adding New Safety Instructions

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Add / Update

Number

Name

Description

List Click on an item link to update

| # | Number | Name |
|---|--------|----------------|
| 1 | S1001 | Safety Ins 001 |

Figure 200: New Safety Form

Here are the steps to add new **Safety Instruction**:

1. Click **Safety Instruction tab**

| | | |
|----------|--------------------|---------|
| Job Plan | Safety Instruction | PC Code |
|----------|--------------------|---------|

 and you should see the form shown in **Figure 200** above.
2. Fill in the Number, Name and Description fields.

3. Click **Save** and it should appear in the listing at the bottom of the form shortly.
4. Finish.

12.2.13.2 Edit Existing Safety Instructions

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|---------------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Add / Update

Number: **SI001**

Name:

Description: **(Edit)**
1.Try safety

Update **Cancel**

List Click on an item link to update

| # | Number | Name |
|---|--------------|----------------|
| 1 | SI001 | Safety Ins 001 |

Figure 201: Editing Existing Safety Instruction

Here are the steps to edit existing **Safety Instruction**:

1. Click **Safety Instruction tab** **Job Plan** **Safety Instruction** **PC Code** and you should see the form shown in **Figure 200** above.
2. In the list of Safety Instructions, click the **safety Number** of an instruction you want to edit. The CMMS will load it into the editing screen as shown in **Figure 201** above.
3. Edit accordingly.
4. Click **Update** to save your changes.

Note: Clicking **Cancel** will return you to 'add new **Safety Instruction**' form.

5. Finish.

12.2.14 Master List: Adding PC Codes (PROFIT CENTER CODES)

PC Code stands for (**Profit Center Code**). It is a function for clients who provide **maintenance as a service** and thus generates profit for their organisations. It is not a mandatory field and can be ignored. Think of Profit Centre codes as the opposite of Cost Center Codes.

12.2.14.1 Adding New PC Codes

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|----------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

New PC Code

Site:

PC Code:

PC Code Description:

PC Code List

| # | PC Code | PC Code Description | Site |
|---|------------|---------------------|-----------------|
| 1 | 001 | Code1 | Cworks Malaysia |

Please click on the link to update

Figure 202: Adding New PC Codes

Here are the steps to add new **PC Codes**:

1. Click **PC Code tab** and you should see the form shown in Figure 202 above.
2. Select **Site**.
3. Fill in **PC Code** and **PC Code Description** fields.
4. Click and it should appear in the listing at the bottom of the form shortly.

Note: Clicking will clear all input fields.

5. Finish.

12.2.14.2 Edit Existing PC Codes

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

New PC Code

Site:

PC Code:

PC Code Description:

| PC Code List | | | |
|--------------|---------|---------------------|-----------------|
| # | PC Code | PC Code Description | Site |
| 1 | 001 | Code1 | Cworks Malaysia |

Please click on the link to update

Figure 203: Edit Existing PC Code

Here are the steps to edit existing **PC Codes**:

1. Click **PC Code tab** and you should see the form shown in **Figure 202** above.
2. Select **Site**.
3. Click on the PC Code in the listing that you want to edit.
4. Edit PC Code Description field as appropriate.
5. Click to save the changes.

Note: will return you to Adding New PC Code form.

6. Finish.

12.2.15 Master List: Adding Cleaning Weightage

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Cleaning Element Weightage

Site: Cworks Malaysia

| Cleaning Elements | Public | Room | Outside |
|-------------------------------|----------------------------------|----------------------------------|----------------------------------|
| Floor | <input type="text" value="10"/> | <input type="text" value="40"/> | <input type="text" value="10"/> |
| Wall | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| Window/ Door | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| Ceiling | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="40"/> |
| Furniture/ Fixture/ Equipment | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| Gen. Waste Bag Holder | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| Consumables | <input type="text" value="40"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <hr/> | | | |
| Total Rating | <input type="text" value="100"/> | <input type="text" value="100"/> | <input type="text" value="100"/> |
| Satisfaction Level | <input type="text" value="70"/> | | |

Classification Group

Cleaning Group

A1

A2

Section Four

Figure 204: Cleanliness Rating (Weightage)

You can access this section by click PC Code Cleaning Weightage Location Inventory .

The screen **Figure 204** above shows the cleanliness rating (weighted rating or weightage) that must be achieved for each elements of a cleaning area by the cleaning teams. The **Area Cleaning scheme** has divided the cleaning area into three regions: **Public**, **Room** and **Outside**. Each region cleanliness rating (weighted rating) can be set independently. The manner in which you reset the cleanliness rating (weighted rating) will either affect the previous cleaning history or not.

There are two ways in which you can change the cleanliness rating (weighted rating):

1. Resetting cleanliness rating (weighted rating) using the New button

- Resetting cleanliness rating (weighted rating) using the  button

12.2.15.1 Resetting cleanliness rating (weighted rating) using New Button

Cleaning Element Weightage

Site: Cworks Malaysia ▾

| Cleaning Elements | Public | Room | Outside |
|-------------------------------|--------|------|---------|
| Floor | 10 | 40 | 10 |
| Wall | 10 | 10 | 10 |
| Window/ Door | 10 | 10 | 10 |
| Ceiling | 10 | 10 | 40 |
| Furniture/ Fixture/ Equipment | 10 | 10 | 10 |
| Gen. Waste Bag Holder | 10 | 10 | 10 |
| Consumables | 40 | 10 | 10 |
| <hr/> | | | |
| Total Rating | 100 | 100 | 100 |
| Satisfaction Level | 70 | | |

Update
New

Resetting cleanliness rating (weighted rating) using the  button will only affect the **Cleaning Module** calculations carried out after the reset. That means, all new calculation will be based on the new cleanliness rating (weighted rating). However, it will not affect previously calculated results (as there will be no recalculation on the previous data).

Here is how you can reset the setting:

- Select the site.

- For each column below, you can change the figure according to your own rating. However, the total per column must be 100.

| Public | Room | Outside |
|---------------------------------|---------------------------------|---------------------------------|
| <input type="text" value="10"/> | <input type="text" value="40"/> | <input type="text" value="10"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="40"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <input type="text" value="40"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |

- Click the **New button**.
- Finish.

12.2.15.2 Resetting cleanliness rating (weighted rating) using Update button

Cleaning Element Weightage

Site: Cworks Malaysia ▾

| Cleaning Elements | Public | Room | Outside |
|-------------------------------|----------------------------------|----------------------------------|----------------------------------|
| Floor | <input type="text" value="10"/> | <input type="text" value="40"/> | <input type="text" value="10"/> |
| Wall | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| Window/ Door | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| Ceiling | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="40"/> |
| Furniture/ Fixture/ Equipment | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| Gen. Waste Bag Holder | <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| Consumables | <input type="text" value="40"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <hr/> | | | |
| Total Rating | <input type="text" value="100"/> | <input type="text" value="100"/> | <input type="text" value="100"/> |
| Satisfaction Level | <input type="text" value="70"/> | | |

Resetting cleanliness rating (weighted rating) using the  button will have major effect across all the previous results (as there will be recalculation on the previous data) that have been calculated in the **Cleaning Module**. In another word, it has the effect of changing the previous history of the results. **Unsatisfactory results** suddenly become satisfactory due to recalculation in the Cleaning Module, based on the new cleanliness rating (weighted rating). Therefore, it is important that you bear this in mind, should you decide to change the rating using the  button.

Here is how you can reset the setting:

1. Select the site.
2. For each column below, change the figure according to your own rating. However, the total per column must be 100.

| Public | Room | Outside |
|---------------------------------|---------------------------------|---------------------------------|
| <input type="text" value="10"/> | <input type="text" value="40"/> | <input type="text" value="10"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="40"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <input type="text" value="10"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |
| <input type="text" value="40"/> | <input type="text" value="10"/> | <input type="text" value="10"/> |

3. Click the **Update button**.
4. Finish.

12.2.15.3 How to create Cleaning group

Classification Group

Cleaning Group

A1

A2

Section Four

Here are the steps to create new cleaning group:

1. From **Figure 204** above, type into the field provide and click the **Save button**.
2. Finish.

12.2.16 Master List: Adding Location Inventory

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|---------------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

| | | |
|-------------------------------------|-------------------------------------|-------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="button" value="Save"/> | <input type="button" value="Save"/> | <input type="button" value="Save"/> |

| Inventory Category | Inventory Element | Inventory Type |
|--------------------|-------------------|----------------|
| Plumbing 1 | | [edit] |
| Architecture | | [edit] |
| Ceiling | | [edit] |
| Wall | | [edit] |

Figure 205: Adding Location Inventory

Here are the steps to add **New Inventory Category**:

1. Type **Inventory Category** name e.g. 'Architecture' into the field below and click **Save**.

The screenshot shows a form with a text input field at the top. Below it is a 'Save' button. Underneath is a section titled 'Inventory Category' containing a table with three rows:

| | |
|------------|--------|
| Plumbing 1 | [edit] |
| Ceiling | [edit] |
| Wall | [edit] |

After saving, you should have something as shown below.

The screenshot shows the same form as above, but the table now has four rows:

| | |
|--------------|--------|
| Plumbing 1 | [edit] |
| Architecture | [edit] |
| Ceiling | [edit] |
| Wall | [edit] |

2. Highlight a category as shown below.

The screenshot shows the 'Inventory Category' form with the 'Architecture' row highlighted in yellow:

| | |
|--------------|--------|
| Plumbing 1 | [edit] |
| Architecture | [edit] |
| Ceiling | [edit] |
| Wall | [edit] |

In the **Inventory Element** field below, type a name e.g. carpet and click **Save**.

The screenshot shows a form with a text input field at the top. Below it is a 'Save' button. Underneath is a section titled 'Inventory Element'.

After saving you should see something like below.

| | |
|-------------------------------------|------------------------|
| <input type="text"/> | |
| <input type="button" value="Save"/> | |
| Inventory Element | |
| Carpet | [edit] |
| Antique Table | [edit] |

3. Highlight Architecture and Carpet as shown below.

| | | | |
|-------------------------------------|------------------------|-------------------------------------|------------------------|
| <input type="text"/> | | <input type="text"/> | |
| <input type="button" value="Save"/> | | <input type="button" value="Save"/> | |
| Inventory Category | | Inventory Element | |
| Plumbing 1 | [edit] | Carpet | [edit] |
| Architecture | [edit] | Antique Table | [edit] |
| Ceiling | [edit] | | |
| Wall | [edit] | | |

In the **Inventory Type** below, fill in a type name e.g. Floor Furnishing and click **Save**.

| |
|-------------------------------------|
| <input type="text"/> |
| <input type="button" value="Save"/> |
| Inventory Type |

You should end up with something like below.

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

| | | | | | |
|-------------------------------------|------------------------|-------------------------------------|------------------------|-------------------------------------|------------------------|
| <input type="text"/> | | <input type="text"/> | | <input type="text"/> | |
| <input type="button" value="Save"/> | | <input type="button" value="Save"/> | | <input type="button" value="Save"/> | |
| Inventory Category | | Inventory Element | | Inventory Type | |
| Plumbing1 | [edit] | Carpet | [edit] | Floor Furnishing | [edit] |
| Architecture | [edit] | Antique Table | [edit] | | |
| Ceiling | [edit] | | | | |
| Wall | [edit] | | | | |

- Repeat the above process if you have more to Location Inventory to add.
- Finish.

To edit any of the fields above, click the field corresponding [\[edit\]](#) link.

12.2.17 Master List: Adding New Crafts

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

New Craft

Craft Number

Craft Description

Craft List

| # | Craft Number | Craft Description |
|---|--------------|-------------------|
| 1 | c0001 | craft no.11 |
| 2 | c0002 | craft no.2 |
| 3 | c0003 | craft no.3 |

Please click on the link to update

Figure 206: Form for Adding New Craft

Here are the steps to add new Craft:

1. Click to open the form in **Figure 206** above.
2. Enter Craft Number and Craft Description.
3. Click **Save**.
4. Finish.

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------------------------------|--------------|--------------------|-----------------------------------------------------------------------------|--------------------|--------------------|----------|----------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |
| New Craft | | | | | | | | | |
| Craft Number | | | c0001 | | | | | | |
| Craft Description | | | craft no.11 | | | | | | |
| | | | <input type="button" value="Update"/> <input type="button" value="Cancel"/> | | | | | | |
| Craft List | | | | | | | | | |
| # | Craft Number | Craft Description | | | | | | | |
| 1 | c0001 | craft no.11 | | | | | | | |
| 2 | c0002 | craft no.2 | | | | | | | |
| 3 | c0003 | craft no.3 | | | | | | | |
| Please click on the link to update | | | | | | | | | |

Figure 207: Form for Editing Existing Craft

Here are the steps to edit existing craft:

1. Click to open the form in **Figure 206** above.
2. In the Craft listing, click on the Craft Number to open it for editing as shown in **Figure 207** above.
3. Click . Note: Clicking **Cancel** will return the form to Add new Craft.
4. Finish.

12.2.18 Master List: Adding a Logo

| Department | Level | Site | Failure Cause | Remedy | Asset Category | BoM List | Supplier | Cost Centre | Account Code |
|------------|----------|--------------------|---------------|--------------------|--------------------|----------|-------------|---------------|--------------|
| Currency | Job Plan | Safety Instruction | PC Code | Cleaning Weightage | Location Inventory | Craft | Logo | Miscellaneous | |

Upload logo

Current Logo 

Figure 208: Logo Upload Form

Adding a new Logo is simple as shown by the form above.

1. Click **Logo Tab**  to open the upload form as shown in **Figure 208** above.
2. Browse to locate the Logo file and click .
3. Finish.

12.2.19 Master List: Adding Miscellaneous info

| | |
|------|----------------------|
| Logo | Miscellaneous |
|------|----------------------|

Click on the **Miscellaneous tab** shown above and you will be able to access a bank/pool of various status and attributes for many maintenance activities.

| | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Work Priority</p> <p>Normal <input type="checkbox"/></p> <p>Urgent <input type="checkbox"/></p> <p>Emergency <input type="checkbox"/></p> <p>Very Emergency <input type="checkbox"/></p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>Work Status</p> <p>Open <input type="checkbox"/></p> <p>Closed <input type="checkbox"/></p> <p>Cancelled <input type="checkbox"/></p> <p>Waiting for Materials <input type="checkbox"/></p> <p>Waiting for Approval <input type="checkbox"/></p> <p>Waiting for Access <input type="checkbox"/></p> <p>Completed <input type="checkbox"/></p> <p>WO Raised <input type="checkbox"/></p> <p>In Progress <input type="checkbox"/></p> <p>Waiting for Work Permit <input type="checkbox"/></p> <p>PR Assigned</p> <p>PO Assigned</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>Work Type</p> <p>Corrective <input type="checkbox"/></p> <p>Preventive <input type="checkbox"/></p> <p>Service Request <input type="checkbox"/></p> <p>Service - Out of Scope <input type="checkbox"/></p> <p>Service - Reimbursable <input type="checkbox"/></p> <p>Manual Preventive</p> <p>Breakdown <input type="checkbox"/></p> <p>New Project</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>Warranty Contract</p> <p>Warranty</p> <p>Contract</p> <p>None</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> |
| <p>Asset Status</p> <p>Active</p> <p>In-Active</p> <p>Disposed</p> <p>Lost</p> <p>In-Storage</p> <p>TRY</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>Work Trade</p> <p>TM - Mechanical <input type="checkbox"/></p> <p>TM - Electrical <input type="checkbox"/></p> <p>TM - Civil <input type="checkbox"/></p> <p>TM - Life and Safety <input type="checkbox"/></p> <p>Landscaping <input type="checkbox"/></p> <p>Cleaning Service <input type="checkbox"/></p> <p>Moves & Setup <input type="checkbox"/></p> <p>Meeting Room Management <input type="checkbox"/></p> <p>Customer Service <input type="checkbox"/></p> <p>Sub-Con Drinking Water <input type="checkbox"/></p> <p>Sub-Con Pest Control <input type="checkbox"/></p> <p>Sub-Con Uniform Laundry <input type="checkbox"/></p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>Asset Critical</p> <p>Normal</p> <p>Critical</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>Attribute Group</p> <p><input type="checkbox"/> Office Stationery</p> <p><input type="checkbox"/> PPE/Uniform</p> <p><input type="checkbox"/> Fixed Asset</p> <p><input type="checkbox"/> TOOL/Small Equipment</p> <p><input type="checkbox"/> TM Consumable</p> <p><input type="checkbox"/> Cleaning Material</p> <p><input type="checkbox"/> Cleaning Consumable</p> <p>Electrical Motors</p> <p>Flammable Materials</p> <p>bearing group</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> |
| <p>Term Of Sale</p> <p>COD</p> <p>CREDIT</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>Ship Via</p> <p>AIR</p> <p>ROAD</p> <p>SHIP</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>Payment Terms</p> <p>10 Days</p> <p>100 Days</p> <p>30 Days</p> <p>45 Days</p> <p>60 Days</p> <p>90 Days</p> <p><input type="text"/></p> <p><input type="button" value="Save"/></p> | <p>GST%</p> <p>0.00</p> |
| <p>Tax</p> <p>0.00</p> | | | |

Figure 209: Miscellaneous Master List

Master miscellaneous information contains data required by EASY functions. Users cannot delete existing data, however they can add new data to it. Data entered on this page will be saved upon exit.

WARNING

Changing the **Miscellaneous tab** various status directly in the database table may have adverse impact on your operation. Please contact us at info@.com.my for more information.

To edit the items in red, click on it and follow the instruction on the screen.

13. ADMINISTRATION

| | |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>ACCESSING ADMINISTRATION</p> <p>You can access Administration on EASY opening screen by clicking the icon on the left, which will open the Administration Opening Screen.</p> |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

The **Administrator module** is for **administrative users only** and it provides the facility for managing user registration, at **module-level** for controlling access to modules, at **function-level** for controlling access to some features within the module, at **site-level** for controlling access to some sites and at **worktrade-level** for controlling access to trades.

You can set up a **new user account** for registering a new user, within which, you can grant **access privileges** at **module** and **function levels** including:

1. Grant/deny access to one or more **modules** (Hidden, Read Only, Modify, Full Access, print)
2. Grant/deny access to one or more **sites** (view only, Full Access, print, etc)
3. Grant/deny access to one or more **work trades**
4. Set, modify the authentication privileges to some or all **sensitive functions**
5. Create or change employees' login **passwords and usernames**

Employee Login & Accessible Details

Modules Additional Permissions **User Account** Site Work Trade

| Main Module Name | Hidden | Read Only | Full Access |
|------------------|----------------------------------|-----------------------|-----------------------|
| Work Orders | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Assets | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Location | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Preventive | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Employees | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Material | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Work Request | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Masters | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Reports | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Administration | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Purchasing | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Cleaning | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Figure 210: Granting/Denying Module-Level Access to User

Employee Login & Accessible Details

| Workorder | Purchase Request | Purchase Order | GRN |
|--------------------------------------------------------|-----------------------------------------------|----------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Allow Re-open WO | <input type="checkbox"/> Allow To Create PR | <input type="checkbox"/> Allow To Create PO | <input type="checkbox"/> Allow To Create GRN |
| <input type="checkbox"/> Allow Assign WO | <input type="checkbox"/> Allow To Re-open PR | <input type="checkbox"/> Allow To Re-open PO | |
| <input type="checkbox"/> Allow Close WO | <input type="checkbox"/> Allow To Cancel PR | <input type="checkbox"/> Allow To Authorized PO | |
| <input type="checkbox"/> Allow To View WO Cost | <input type="checkbox"/> Allow To Approved PR | <input type="checkbox"/> Allow To Cancel PO | |
| <input type="checkbox"/> Allow Material Return From WO | | <input type="checkbox"/> Allow To Print PO | |
| <input type="checkbox"/> Allow Material Issue From WO | | <input type="checkbox"/> Register Invoice To | |
| <input type="checkbox"/> Can View Assign WO Only | | PO Approval Amount <input style="background-color: #ffff00;" type="text"/> | |
| <input type="checkbox"/> Allow PM Generation | | | |
| Material | Remote Web Request | | |
| <input type="checkbox"/> Allow Adjustment | <input type="checkbox"/> Limit Web Request | | |

Figure 211: Granting/Denying Function-Level Access to User

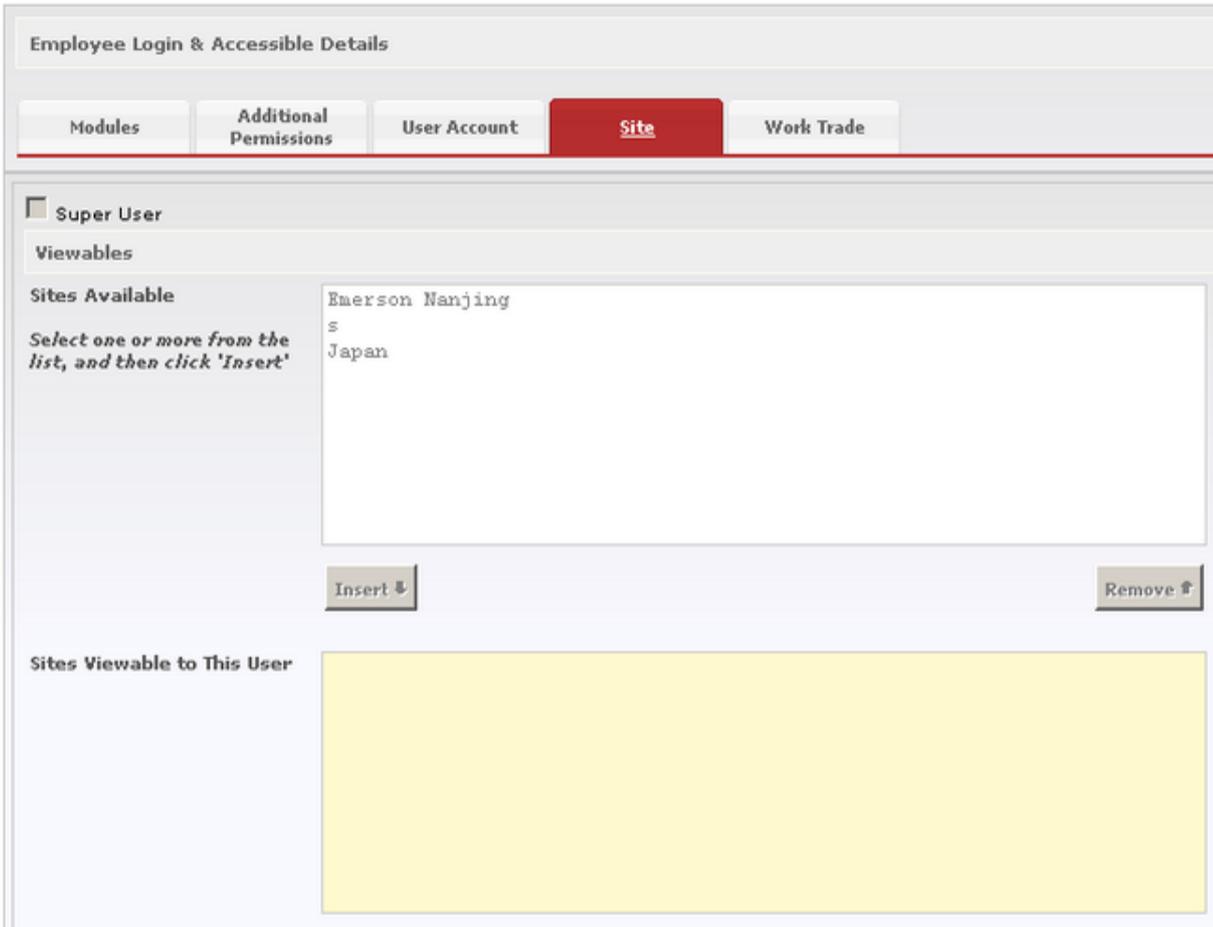


Figure 212: Granting/Denying Site-Level Access to User

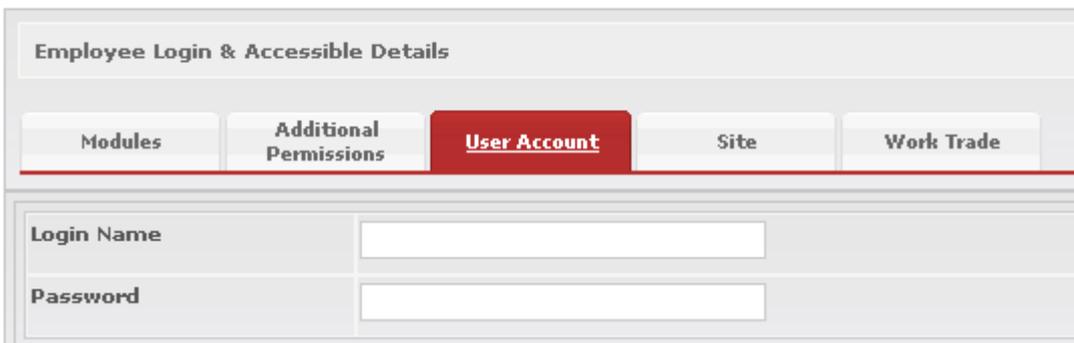


Figure 213: User Account – Login Username and Password

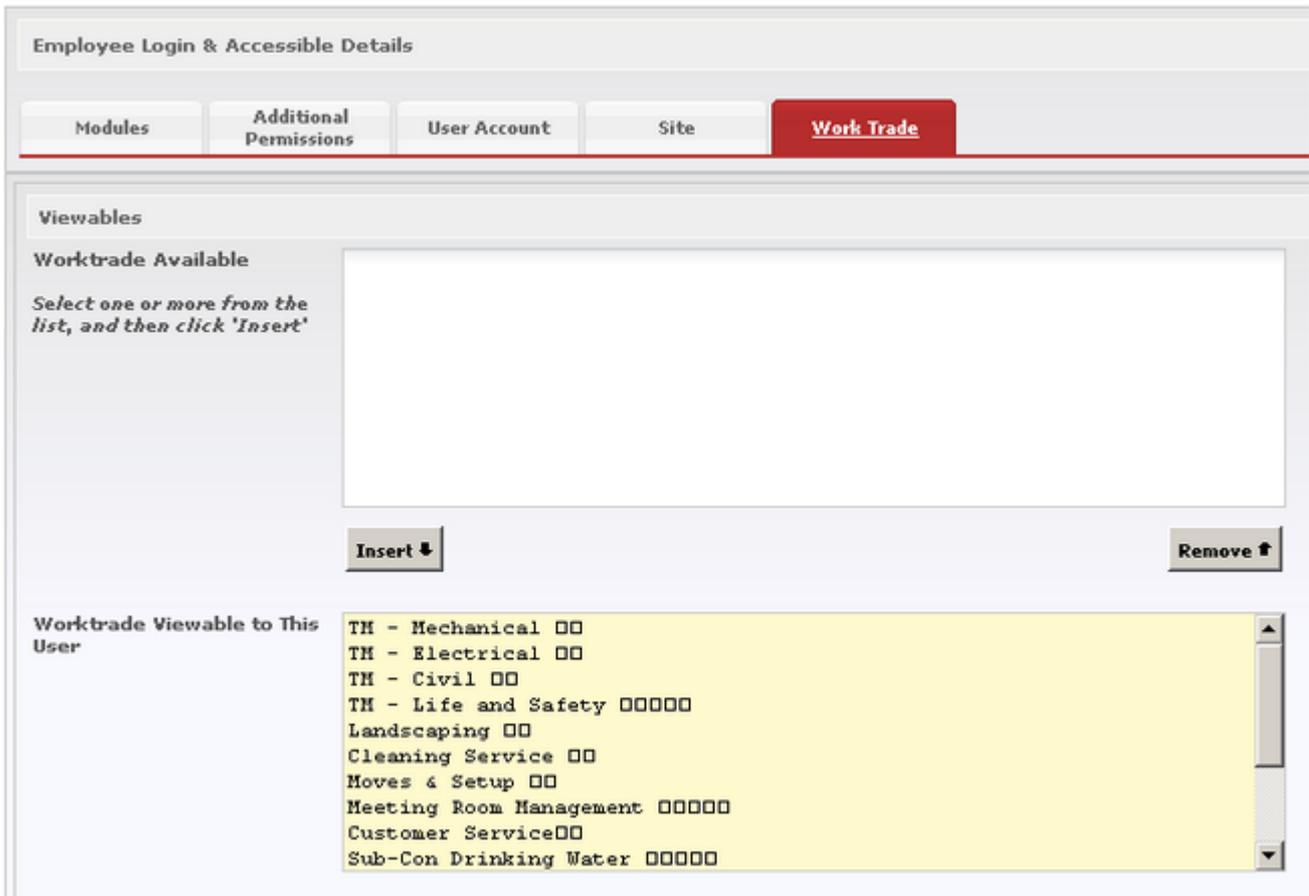


Figure 214: Granting/Denying Worktrade-Level Access to User

When you access **Administration**, you will see the **opening screen** as shown in **Figure 215**, where you also find a set of **menu icons** below:



1. List Employees

A click on this icon will always take you to **Administration Opening Screen**. In addition, it automatically lists **all registered employees** that you can flip through– page by page. Alternatively, you can use the search facility to find an employee.

2. New Employee

A click on this icon allows you to add or register new employees.

3. Session Trails

Session Trails allows you to display the access-log of any user; it allows you to view user’s actions, movements and access with the CMMS. Typically, these access-logs show users’ activities within the CMMS – such as times and dates of logins and logouts, etc.

4. **Search**

A facility for locating an employee

13.1 Administration Opening Screen



Figure 215: Administration Opening Screen –gives automatic listing of employees

The table below gives the descriptions of menu icons on the opening screen above.

| No. | Menu Icon | Description |
|-----|-------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| 1. |  List Employees | Click to return to Administration Opening Screen. |

| | | |
|----|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| 2. |  New Employee | Click to add and register a new employee |
| 3. |  Session Trails | View an employee's session trail i.e. user's activities from logging in until logging out. |

13.2 How to add New Employee

The **Add New Employee** function is exactly similar to the one found in the **Employee Section/Module**. Therefore, to avoid repetition please refer to that section for full detailed description.

Here are the steps to add a new **employee or user**:

1. On the **Administration opening screen** as shown in **Figure 215**, click **New Employee**



icon to open a **new Employee registration form**.

2. Fill in all the employee's details on the form.

For a fuller description on '**How to Add New Employee**', see the **Employee Section/Module**.

3. Save the new employee record when you finished entering employee's details using the



button.

4. After you saved the new employee's record, the CMMS will change the form to **employee editing form** as shown below. However, unlike the **employee editing form** of the **Employee Section/module**, this form has extra facility for setting the following user **Administration details**:

1. Modules Accessibility (Modules accessible to this user)
2. Additional Permissions (secured functions accessible to this user)
3. User Account
4. Sites Accessibility (sites accessible to this user)
5. Work Trade (relevant to this user)

| Employee Login & Accessible Details | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|-----------------------|----------------------------------|
| Modules Additional Permissions User Account Site Work Trade | | | |
| Main Module Name | Hidden | Read Only | Full Access |
| Work Orders | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Assets | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Location | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Preventive | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Employees | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Material | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Work Request | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Masters | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Reports | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Administration | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Purchasing | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Cleaning | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

At this point, you can either continue further setting up or exit editing.

For further setting up, see next section on how to do this.

5. Finish.

13.3 How to Edit Employee Details and Access Privileges

ADMINISTRATION - CURRENT EMPLOYEE

 Welcome Elias Ishak
 Seconds before redirect: 092
[Change Level](#)

List Employees

New Employee

Session Trails

[update](#)

| | | | |
|-----------------|--------------------------------------------------------------------------|-------------|------------------------------------------------------------------------|
| Employee No. | 002 | Site Code | Cworks Malaysia |
| Full Name | John Baker | Department | Order Management |
| Category | <input checked="" type="radio"/> Employee <input type="radio"/> Customer | Status | <input checked="" type="radio"/> Active <input type="radio"/> Inactive |
| Designation | Junior Assistance Service Manager | | |
| Address | 88 Bakersfield, Memphis, Tennessee. USA | | |
| Office Location | Memphis, Tennessee | | |
| Email | | | |
| Work Phone | 10427781245 | Ext. | 8 |
| Mobile Phone | | Fax | |
| Hourly Salary | 30.0000 | House Phone | |
| Over Time 2 | 60 | Over Time 1 | 45 |
| | | Over Time 3 | 0 |

[update](#)

Employee Login & Accessible Details

Modules
Additional Permissions
User Account
Site
Work Trade

| Main Module Name | Hidden | Read Only | Full Access |
|------------------|----------------------------------|-----------------------|-----------------------|
| Work Orders | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Assets | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Location | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Preventive | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Employees | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Material | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Work Request | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Masters | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Reports | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Administration | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Purchasing | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Cleaning | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

[Save](#)

Figure 216: Existing Employee Record opened for editing

Here are the steps to open and edit **existing employee or user** record:

1. In the **Administration opening screen** of **Figure 215**, to edit an employee record click on the employee number on the employees listing. The CMMS will open the employee record as shown in **Figure 216**.
2. Edit the employee details accordingly and click **Update button** to save the changes. (This is the same as in the **Employee Section/Module**).
3. Under **Module Accessibilities Tab**, grant access to those modules that this user can access. Module is accessible when you click the radio buttons corresponding to the module. Consequently, only accessible Modules are **visible** to this user. Others become hidden.
4. Go to (click on it) **Authentication Permission Tab**.
5. **Grant** or **deny** to this user access to **secured functions** below by **ticking** the appropriate check boxes below.

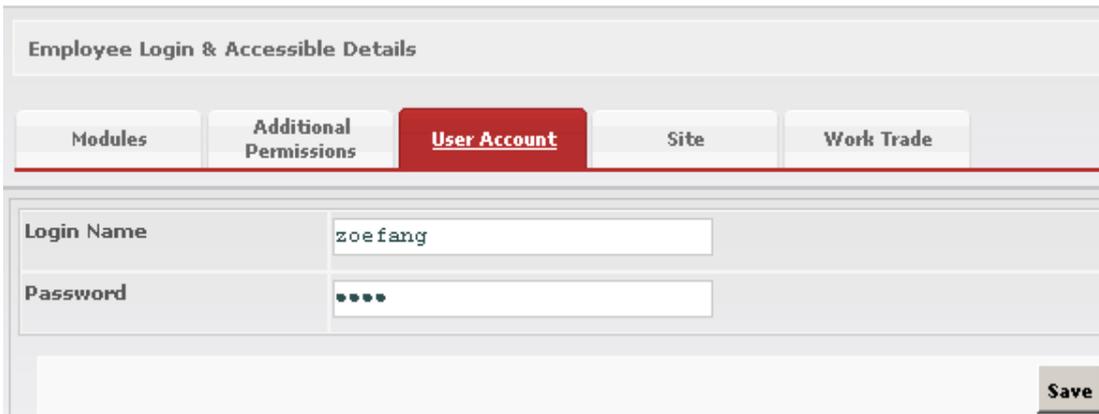
Employee Login & Accessible Details

| | | | | |
|---------|-------------------------------|--------------|------|------------|
| Modules | Additional Permissions | User Account | Site | Work Trade |
|---------|-------------------------------|--------------|------|------------|

| Workorder | Purchase Request | Purchase Order | GRN |
|--------------------------------------------------------|-----------------------------------------------|--------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Allow Re-open WO | <input type="checkbox"/> Allow To Create PR | <input type="checkbox"/> Allow To Create PO | <input type="checkbox"/> Allow To Create GRN |
| <input type="checkbox"/> Allow Assign WO | <input type="checkbox"/> Allow To Re-open PR | <input type="checkbox"/> Allow To Re-open PO | |
| <input type="checkbox"/> Allow Close WO | <input type="checkbox"/> Allow To Cancel PR | <input type="checkbox"/> Allow To Authorized PO | |
| <input type="checkbox"/> Allow To View WO Cost | <input type="checkbox"/> Allow To Approved PR | <input type="checkbox"/> Allow To Cancel PO | |
| <input type="checkbox"/> Allow Material Return From WO | | <input type="checkbox"/> Allow To Print PO | |
| <input type="checkbox"/> Allow Material Issue From WO | | <input type="checkbox"/> Register Invoice To | |
| <input type="checkbox"/> Can View Assign WO Only | | PO Approval Amount <input style="width: 50px;" type="text"/> | |
| <input type="checkbox"/> Allow PM Generation | | | |
| Material | Remote Web Request | | |
| <input checked="" type="checkbox"/> Allow Adjustment | <input type="checkbox"/> Limit Web Request | | |

Any **checked functions** become accessible while unchecked functions become inaccessible and hidden from the user. e.g. if '**Allow To Return Material WO**' is **checked** then the user will see it in the **Work Orders Section/Module** of the **Material Tab** form.

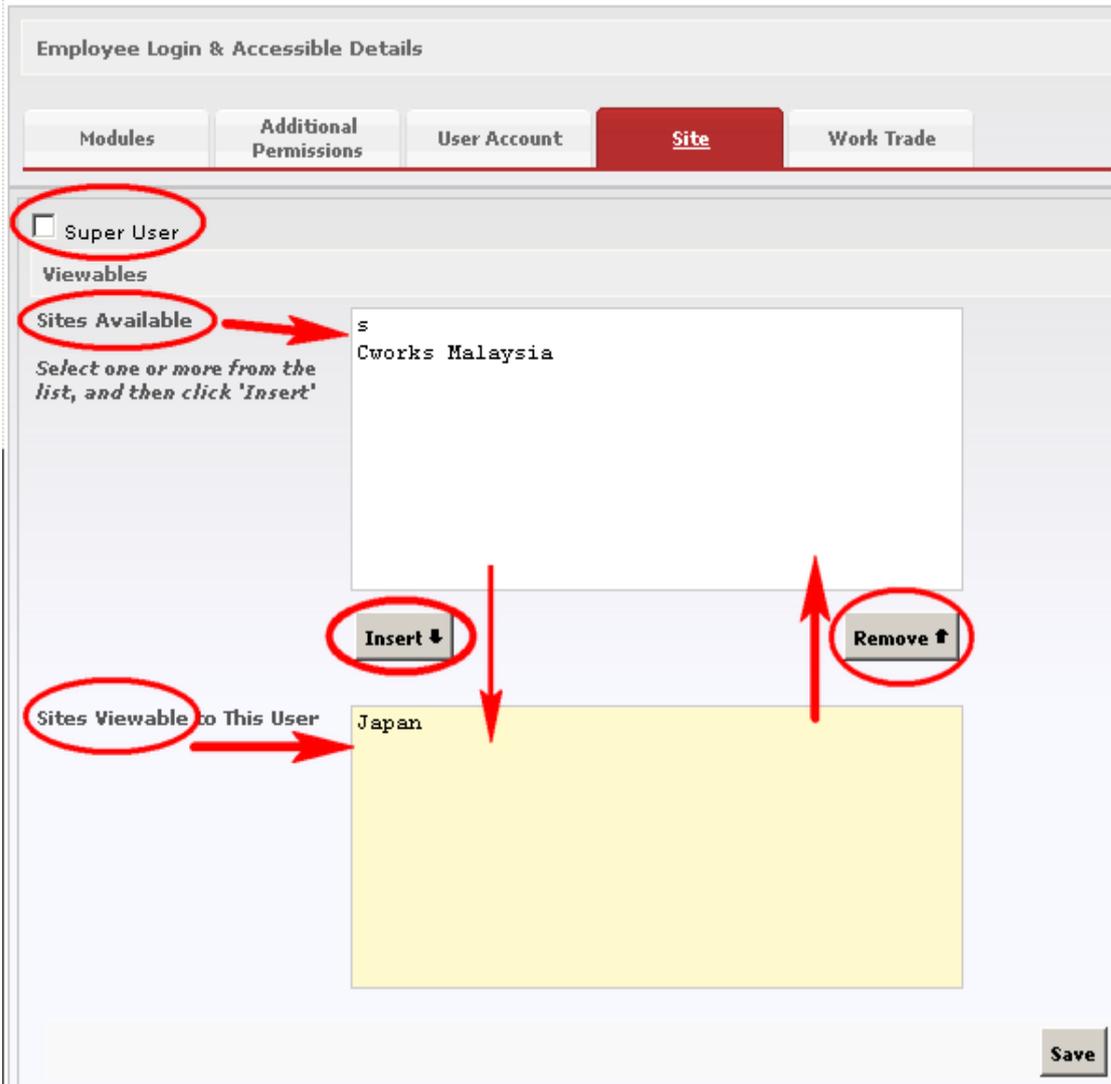
6. Create or edit login username and password for the user on the tab below.



The screenshot displays a web form titled "Employee Login & Accessible Details". At the top, there are five tabs: "Modules", "Additional Permissions", "User Account" (which is highlighted in red), "Site", and "Work Trade". Below the tabs, there are two input fields: "Login Name" with the text "zoe fang" and "Password" with four dots. A "Save" button is located at the bottom right of the form.

The username and password can only be changed by users with **Administrative access**.

7. Select the **sites** which are viewable to this user.



You can grant access to extra sites to this user and you can set user status to **Super User**. However, sites that are **not viewable** by this user, will not be visible in the site-drop down list.

8. Edit the **Worktrade Tab** shown below allowing user to access only to certain work trades.

Employee Login & Accessible Details

Modules
Additional Permissions
User Account
Site
Work Trade

Viewables

Worktrade Available

Select one or more from the list, and then click 'Insert'

Insert ↓
Remove ↑

Worktrade Viewable to This User

| | |
|-------------------------|-------|
| TM - Mechanical | □□ |
| TM - Electrical | □□ |
| TM - Civil | □□ |
| TM - Life and Safety | □□□□□ |
| Landscaping | □□ |
| Cleaning Service | □□ |
| Moves & Setup | □□ |
| Meeting Room Management | □□□□□ |
| Customer Service | □□ |
| Sub-Con Drinking Water | □□□□□ |

Save

9. Click Save to save all the changes.

10. Finish.

13.4 How to View User Audit Trail

SESSION TRAILS

 Welcome **Elias Ishak**
 Seconds before redirect: **1199**
[Change Level](#)

List
Employees

New
Employee

Site : Emerson Nanjing

| # | User | Log In | Log Out | Log Activity |
|----|-------|------------------------|------------------------|--------------------------|
| 1 | Admin | 11 February 2011 10:15 | 11 February 2011 10:26 | View log |
| 2 | Admin | 10 February 2011 17:35 | 11 February 2011 09:10 | View log |
| 3 | Admin | 10 February 2011 15:28 | 10 February 2011 17:26 | View log |
| 4 | Admin | 10 February 2011 13:58 | 10 February 2011 15:28 | View log |
| 5 | Admin | 10 February 2011 12:13 | 10 February 2011 12:51 | View log |
| 6 | Admin | 10 February 2011 11:20 | 10 February 2011 12:13 | View log |
| 7 | Admin | 10 February 2011 10:28 | 10 February 2011 11:00 | View log |
| 8 | Admin | 10 February 2011 09:57 | 10 February 2011 10:40 | View log |
| 9 | Admin | 10 February 2011 09:55 | 10 February 2011 09:57 | View log |
| 10 | Admin | 10 February 2011 09:30 | 10 February 2011 09:34 | View log |
| 11 | Admin | 9 February 2011 17:47 | 10 February 2011 09:30 | View log |
| 12 | Admin | 9 February 2011 16:45 | 9 February 2011 17:29 | View log |
| 13 | Admin | 9 February 2011 16:30 | 9 February 2011 17:38 | View log |
| 14 | Admin | 9 February 2011 16:24 | 9 February 2011 16:44 | View log |
| 15 | Admin | 9 February 2011 16:03 | 9 February 2011 16:29 | View log |

Record(s) : 53
Page of [First](#) [Previous](#) [Next](#) [Last](#)

User

Figure 217: Audit Trail listing for all employees

| Page 1 of 1 First Previous Next Last | | | |
|--------------------------------------|-----------------------------------|----------|------------------------|
| # | Activity | Refer No | Date |
| 1 | Update part details for sub store | P007 | 10 February 2011 11:34 |
| 2 | Update part details for sub store | P007 | 10 February 2011 11:44 |
| 3 | Add supplier for part | P007 | 10 February 2011 11:47 |
| 4 | Add supplier for part | P007 | 10 February 2011 11:47 |
| 5 | Set default supplier for part | P007 | 10 February 2011 11:47 |
| 6 | Set default supplier for part | P007 | 10 February 2011 11:47 |
| 7 | Update part information | P007 | 10 February 2011 11:47 |
| 8 | Delete supplier from part | P007 | 10 February 2011 11:48 |

Page 1 of 1 First Previous Next Last

Figure 218: Viewing an Employee's Audit Trail Log in Chronological Order

Here are the steps to view an audit trail of an employee:

1. On the **Administration opening screen** as shown in **Figure 215**, click **Session Trails icon**



to open the audit trails listing of employees as shown in **Figure 217** above.

2. On the employee listing, click on any of the employee number whose audit trails you would like to view. The CMMS will present the audit trail screen similar to that shown in **Figure 218** above.
 3. Finish.
-