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Novice is a comprehensive maintenance management system that provides numerous features required by maintenance departments to efficiently organize and manage their operations.

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About Novice

Novice is a comprehensive Maintenance management system that provides numerous features required by maintenance departments to efficiently organize and manage their operations. The system records information on equipment and vendors, track's inventory and issues work orders for repair or preventive maintenance.

All information in Novice is stored in interactive databases, allowing the data to be used by more than one file.   This provides the flexibility, rapid access and efficiency needed to accommodate constantly increasing amounts of data.

Maintenance Management.

Different Modules of Novice

Technical Support

Novice customers will receive support directly from software specialists who will answer their questions and resolve any problems. Included with the purchase of this system is 90 days of free support.   After this complimentary support expires, the customer has the option of purchasing an annual support subscription through Eagle Technology.   If you, the customer, wish to decline this offer, simply ignore the invoice.

Eagle Technologys support specialists are available to answer questions . The support specialists can also assist with   hardware problems that may be encountered.   The customer, however, is responsible for securing maintenance services for defective devices.

Support specialists are available Monday through Friday (excluding holidays) from 8:00am to 5:00pm CST at 1-800-388-3268.

If you have any comments or suggestions, please feel free to call or send a postcard with your ideas to:

Eagle Technology

Customer Input

10500 N. Port Washington Rd.

Mequon, WI   53092

Maintenance Management

Maintenance management is the effective planning and execution of tasks required to maintain operations.   It spans many diverse functions and responsibilities, ranging from designing maintenance jobs to providing and scheduling the resources needed to complete the work.

Maintenance tasks may be defined by the engineering, production or maintenance staffs. They are either unscheduled (demand) jobs or regular (preventive maintenance) procedures.   With the exception of emergency repair jobs, every maintenance procedure should be planned, scheduled and performed accordingly.

Importance of Maintenance Management

* Decreased downtime.
* Increased Productivity.
* Efficient management of Resources.
* Control over inventory stock.
* Ready Access to History & Related Stock.
* Reduced Paper Work.

Successfully planning a maintenance procedure requires accurate information to be maintained on the equipment, its components and ongoing production or workload requirements.   The maintenance skills must correspond with the workload and equipment availability.   Parts and supplies must be procured in advance to remain on   schedule.

Different Modules of Novice

Different Modules available for Novice Software are

Employee

Equipment

Inventory

Vendors

Demand Maintenance(DM)

Preventive Maintenance(PM)

Employee

You use the Employee option to record and maintain personal employee information for each maintenance worker. Use this option to record contractors, also.   In this case, you would specify the name of the contractors in the Employee Name field, since you probably may not know the names of the contractors employees.

If you wish to leave any field blank, merely press the Tab key and the cursor will skip to the next information entry field.

Adding Employee Records.

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Modifying Employee Records.

Equipment

The Equipment option is used to record in detail all the equipment that are the responsibility of the maintenance department. Equipment can include fans, sensors, actuators, chillers, building and grounds, fleet vehicles and renovation or overhaul projects.   Generally speaking, any asset or physical location that must be maintained on a regular basis or for which you wish to keep maintenance records, can be tracked by the Equipment option.

With Equipment, you can sort, select, retrieve and report on pieces of equipment.   This will help you analyze, plan and manage your equipment maintenance operations.

Each piece of equipment is identified by a unique Equipment Number and is recorded separately in the Equipment Master File.

If you dont have an existing equipment data base that can be converted to a Expert Maintenance Management data base, youll need to manually enter each piece on the Equipment Master File template. Simply transcribe the information listed on the forms into the matching screen entry fields.   If you wish to leave any field blank, merely press the Tab key and the cursor will skip to the next information entry field.   If you do not use the forms, you can enter information as you go along.

The only field on the Equipment Master File template that requires an entry is the Equipment Number. All others are optional. Note, however, that leaving information fields blank decreases Novices effectiveness in building complete maintenance history records. Therefore, make sure you gather all available information prior to recording. At the very least, you should enter the equipment name, location, and serial number of the equipment in addition to the two items mentioned above. You may always add to or edit any of the data at a later date.

Adding Equipment Records.

Deleting Equipment Records.

Modifying Equipment Records.

Browsing Equipment Records

Inventory

You use the Inventory option to record your in-stock supplies. Inventory is a complete spare parts and maintenance supplies management system that is linked with the Equipment, Vendor and Maintenance allowing extensive lookup and cross-referencing capabilities throughout the Novice system.

Using Novice, you add each part in inventory to the Inventory File. Simply transcribe the collected information from the forms into the matching template entry fields.   If you wish to leave any field blank, merely press the Tab key and the cursor will skip to the next information entry field.   If you did not use the forms, you can enter information as you go along.

Adding Inventory Records.

Deleting Inventory Records.

Modifying Inventory Records.

Vendors

You use the Vendors option to record in detail all the information on the suppliers of your equipment, tools, parts, contracted services, etc. It allows you to add, delete and copy vendors.

The Vendor Master File is linked to the Equipment and Inventory Files, such that the equipment and inventoried parts supplied by the vendor can be displayed from the Vendor File template.   A separate record is kept for each vendor.

Each vendor is assigned a unique code number.   This number is used by Novice to store vendor information.   We recommend that you use the same vendor codes that your purchasing department uses, so that the POs and requisitions that are passed between the two departments have consistency.

Adding Vendor Records.

Deleting Vendor Records.

Modifying Vendor Records.

Browsing Vendor Records.

Demand Maintenance

You use the Demand Maintenance option to plan, create and record maintenance jobs and procedures in response to maintenance service requests, emergency breakdowns or other non-routine maintenance activity.   Each work order asks for a variety of information, such as the priority of the job, the symptom of the problem and the date by which the job should be completed.

Demand Maintenance Active File

The Demand Maintenance Active file is where all active DM work orders are stored. These work order will remain in the DM Active File until they are manually closed.   They will then be moved to and stored in the Demand Maintenance History File.

When you create a new work order, Novice assigns a Demand Number to the job.   This is done in sequential order starting with 1 and so on.   Demand numbers cannot be user defined and cannot contain letters.

Creating a DM Work Order.

Modifying a work Order.

Printing a DM Work Order.

Closing a DM Work Order.

Deleting a DM Work Order.

Demand Maintenance History

The DM History option is used to view closed Demand Maintenance Work Orders.   A corresponding history record is kept for preventive work orders too.   (Refer to the PM History section).   Thus, Novice maintains a complete record of all maintenance work performed at your facility.

When a DM work order is closed, its material totals are posted to the Inventory File to update inventory totals.   Then, the closed DM   work order is posted to the Demand Maintenance History File.   You view this file by clicking the Demand Maintenance History File option under the File menu.

Viewing a Closed DM Work Order.

Preventive Maintenance

You use the Preventive Maintenance option to develop, assign and schedule preventive maintenance procedures. A carefully planned and consistently executed preventive maintenance program is crucial to improved maintenance department operations.

Preventive Maintenance Master File

Planned, regular maintenance of inventory and facilities reduces emergency repair requests, shortens inventory downtime during periods intended for production, improves the condition and useful lifetimes of inventory and facilities and evens out maintenance personnel workload and resource availability. With all those benefits, its worth the time and effort to design and implement preventive maintenance procedures and work assignments.

Each PM job can be assigned a priority to classify its importance or urgency.   You can then sort, print and assign PM jobs by priority level

Creating a PM Work Order.

Activating a PM Work Order.

Modifying a PM Work Order.

Printing a PM Work Order.

Closing a PM Work Order.

Deleting a PM Work Order.

Preventive Maintenance Active File

You use the Preventive Maintenance Active File to view, modify, print and close all active PM work orders.   All work orders found in the PM Active File are active work order files. Work orders may not be created in the PM Active File. You must create your work orders in the Preventive Maintenance Master File.

Modify a Work Order.

Printing a PM Work Order.

Closing a PM Work Order.

Preventive Maintenance History File

You use the PM History option to view all Preventive Maintenance (PM) work orders that have been closed.   A corresponding history record is kept for demand maintenance work orders, too. Thus, Novice maintains a complete record of all maintenance work performed at your facility.

When PM work orders are closed, their material totals are posted to the Inventory Master Files to update their inventory histories.   Then, the closed work orders are automatically added to the PM History Master File.   You view this file by clicking the PM History option under the File menu.

<u>Viewing a Closed   PM Work Order.</u>

Adding Equipment Records

Follow these steps to add a piece of equipment or a subassembly. This procedure is much easier and faster if you have in front of you complete information on this equipment.   If you have filled out a worksheet for this equipment, have it ready.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Equipment option.   The Equipment File template displays show a defined piece of equipment.

3. Click the New button.   The template clears for you to enter a new piece of equipment.

4. Type in all the information valid for this equipment. The parameters that are highlight in green have Lookup Tables, which are displayed when you double-click on the parameter.   Use these to help you enter the data.

    When you type an equipment number and press Enter, the field turns gray, which means it is stored in the data base and becomes read-only (cannot be changed).

    If you enter an equipment number that already exists, the message   A unique equipment number is required is displayed.   Click OK and enter a different equipment number.

    Define the vendor for the equipment by clicking the down arrow in the Vendor Code field and select.

5. If you want to type in some notes about this equipment, such as purchasing details or equipment breakdown history, click the Notes button.   The Notes window displays. After you are done with note taking, close the Notes window.   The message Do you want to save your changes appears.   Click Yes to save or No to escape without saving changes.

6. After you have entered all information, close the window to save the new equipment records

See Also **…**

<u>Overview</u>

<u>Deleting Equipment Records.</u>

<u>Modifying Equipment Records.</u>

<u>Browsing Equipment Records.</u>

Deleting Equipment Records

Follow these steps to permanently delete equipment from the Equipment File. Novice deletes the record and the connecting records which were part of the equipment record, including notes. Deleted equipment records cannot be restored.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Equipment option.   The Equipment File template displays showing a defined piece of equipment.

3. Go to the equipment you want to delete by either using the Next and Prev arrows, or using a Browsing Table on the Equipment Number parameter.

4. Press the Delete key on your keyboard.   The piece of equipment is deleted from the Equipment File.

See Also **...**

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Adding Equipment Records.

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Browsing Equipment Records.

Adding Employee Records

Follow these steps to add an employee record. This procedure is much easier and faster if you have in front of you complete information on this Employee.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Employee option.   The Employee File template displays   showing a defined employee record.

   Note that the Employee ID parameter is highlighted in green, which means it has a Browsing Table.   (You may use it to display currently defined employees, to make sure that the employee you want to add is not already in the database.)

3. Click the New button.   The template clears for you to enter the new employee.

4. Type in the employee information as completely as possible.The Parameters that are highlighted in green, have a Browsing Table.

   When you type an employee number and press enter. The field turns gray, which means it is stored in the data base and becomes read-only (cannot be changed).

   If you enter an Employee/Clock No. that already exists, the message A unique employee ID is required   is displayed.   Click OK and enter a different number. Novice allows you to enter two people with the same name, but with different clock numbers.

5. If you want to type in some notes about this employee, such as past promotions, pay raises, or disciplinary action, click the Notes button.   The Notes window displays. After you are done with note taking, close the Notes window.   The message Do you want to save your changes appears.   Click Yes to save or No to escape without saving changes.

6. After you have entered all information, close the Employee File window to save the new employee record.

See Also **...**

Deleting Employee Records

Follow these steps to permanently delete obsolete or incorrect employee records from the master file. *Deleted records cannot be restored.*

1. Click the File option on the Main menu.   The File menu displays.
2. Click the Employee option on the File menu (or click the Employee Quick Icon).   The Employee template displays.
3. Go to the employee record you want to delete by either using the Next and Prev arrows, or using the Browsing Table on the Employee ID or Employee Name parameter.
4. Click the Delete button.   The employee record is deleted from the Employee File.

See Also **...**

Overview

Adding Employee Records.

Modifying Employee Records.

Modifying Employee Records

Follow these steps to change an employee record.
1. Click the Employee option on the File menu (or click the Employee Quick Icon).   The Employee template displays.

2. Go to the employee record you want to modify by either using the Next and Prev arrows, or using the Browsing Table on the Employee ID or Employee Name parameter.

3. Make your changes. When you are finished, close the Employee File window to save the changes.

See Also **...**

Overview

Adding Employee Records.

Deleting Employee Records.

Modifying Equipment Records

Follow these steps to modify existing equipment record.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Equipment option.   The Equipment File template displays showing a defined piece of equipment.

3. Go to the equipment you want to modify by either using the Next and Prev arrows, or using a Browsing Table on the Equipment Number parameter.

4. Make your changes. When you are finished, close the Equipment File window to save the changes.

See Also **...**

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Adding Equipment Records.

Deleting Equipment Records.

Browsing Equipment Records.

Browsing Equipment Records

Follow these steps to quickly browse through the records in the master file and examine information about a piece of equipment, such as any notes taken regarding the piece of equipment.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Equipment option.   The Equipment File template displays showing a defined piece of equipment.

3. To look up information on the equipment or to browse, double-click on the green Equipment Number, Equipment Name or Location parameters.   The Browsing Table will appear showing Equipment Number, Equipment Name, Location, Serial Number, Current Usage, Manufacturer, Model/Type, Asset Number, Warranty Date, and Vendor Code.   If you wish to see any notes taken, click the Notes icon.

See Also **...**

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Modifying Equipment Records.

Adding Inventory Records

Follow these steps to add inventory records. This procedure is much easier and faster if you have in front of you complete information on the part.   If you have filled out a Worksheet for this part, have it ready.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Inventory option (or click the Inventory Quick Icon).   The Inventory File template displays   showing a defined part in inventory.

3. Click the New button.   The template clears for you to enter your new part.

4. Type in all the information valid for this part.The parameters that highlight in green have Browsing Tables, which are displayed when you double-click on the parameter. Use these to help you enter the data.

    When you type a part number and press Tab, the field turns gray, which means it is stored in the data base and becomes read-only (cannot be changed).

    If you enter a part number that already exists, the message A unique part number is required is displayed.   Click OK and enter a different part number.

    Define the vendor for the part by clicking the down arrow in the Vendor Code field.   The Lookup table will appear.   Select a defined vendor by clicking in the box to the desired vendor.   The vendor will highlight.   Close the Lookup table to enter this vendor on the Inventory File.

5. If you want to type in some notes about this part, such as where the part is located in a warehouse, click the Notes button.   The Notes window displays.   After you are done with note taking, close the Notes window.   The message Do you want to save your changes appears.   Click Yes to save or No to escape without saving changes.

6. After you have entered all information, close the Inventory File window to save the new part.

See Also **...**

Deleting Inventory Records

Follow these steps to permanently delete obsolete or incorrect part from the Inventory File. *Deleted records cannot be restored.*

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Inventory option (or click the Inventory Quick Icon).   The Inventory File template displays   showing a defined part.

3. Go to the part you want to delete by either using the Next and Prev arrow, or using a Browsing Table on the Part Number or Part Name field.

4. Press the Delete key on your keyboard.   The part is deleted from the Inventory File.

See Also **...**

Overview

Adding Inventory Records.

Modifying Inventory Records.

Modifying Inventory Records

Follow these steps to modify an existing inventory record.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Inventory option (or click the Inventory Quick Icon).   The Inventory Master File template displays   showing a defined part.

3. Go to the part you want to modify by either using the Next and Prev arrows, or using a Browsing Table on the Part Number or Part Name parameter.

4. Make your changes. When you are finished, close the Inventory File window to save the changes.

See Also **...**

Overview

Adding Inventory Records.

Deleting Inventory Records.

Adding Vendor Records

Follow these steps to add a vendor. This procedure is much easier and faster if you have complete information on this vendor in front of you.   If you have filled out a worksheet for this vendor, have it ready.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Vendors option.   The Vendor File template displays showing various information on a currently defined vendor.

3. Click the New button. The template clears for you to enter your new vendor.

4. Type in all the information valid for this vendor. The parameters that are highlighted in green have Browsing Tables, which are displayed when you double-click on the parameter.   Use these to help you enter the data.

    When you type a vendor code and press Tab, the field turns gray, which means it is stored in the data base and becomes read-only (cannot be changed).

    If you try to define a vendor that already exists, the message A unique vendor code is required is displayed.   Click OK and enter a different vendor.

5. If you want to type in some notes about this vendor, such as performance or reliability, click the Notes button. The Notes window displays. After you are done with note taking, close the Notes window.   The message Do you want to save your changes appears.   Click Yes to save or No to escape without saving changes.

6. After you have entered all information, close the Vendor File window to save the new vendor.

See Also **...**

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Browsing Vendor Records.

Deleting Vendor Records

Follow these steps to permanently delete a vendor from the Vendor File. Novice deletes the vendor record and the connecting records which were part of the vendor record, including notes.   *Deleted vendor records cannot be restored.*

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Vendors option.   The Vendor File template displays showing a defined vendor.

3. Go to the vendor you want to delete by either using the Next and Prev arrows, or using a Browsing Table on the Vendor Code or Vendor Name parameter.

4. Click the Delete button.   The vendor is deleted from the Vendor File.

See Also **...**

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Adding Vendor Records.

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Modifying Vendor Records

Follow these steps to modify existing vendor records.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Vendors option.   The Vendor Master File template displays showing a defined vendor.

3. Go to the vendor you want to modify by either using the Next and Prev arrows, or using a Browsing Table on the Vendor Code or Vendor Name parameter.

4. Make your changes. When you are finished, close the Vendor File window to save the changes.

See Also **...**

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Browsing Vendor Records.

Browsing Vendor Records

Follow these steps to quickly browse through the records in the Vendor Master File and examine information about a vendor, such as the parts and equipment lists.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Vendors option.   The Vendor File template displays showing a defined vendor.

3. To look up information on the vendor or to browse, double-click on the green Vendor Code or Vendor Name parameters.   The Browsing Table will appear showing Vendor Code, Vendor Name, Address, City, State, Zip Code, Contact, Phone Number and Fax Number.   If you wish to see any notes taken regarding this vendor, click the Notes button.

See Also **...**

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Deleting Vendor Records.

Creating a DM Active File Work Order

Follow these steps to create a demand maintenance work order.   A DM work order may be specific to a single piece of equipment (punch press), a group of similar units (all Carier rooftop A/C units), or simply a location (zone three).

1. Click the File option on the Main menu.   The menu displays. (You may also click the DM Active icon).

2. Click the Demand Maintenance Active File option.   The Demand Maintenance Active File displays

3. Click the New icon.   The template clears and the Demand Number field increments by one.

4. Pull up the Lookup table for the Equipment Number by clicking on the down arrow next to the field.   Choose the piece of equipment that requires maintenance by highlighting the record.   The record is inserted into your Master File along with the location, warranty date and vendor associated with the chosen piece of equipment.

5. Type in all other information required for this work order . Use the pull down menu to help you enter an employee ID.   Novice fills in the Date Issued field for you.

6. If you want to type in some notes about this DM job, such as any tips or tricks in completing the job, click the Notepad icon.   The Notes windows displays.   After you are done with note taking, close the Notes window. The message Do you want to save your changes appears.   Click Yes to save or No to escape without saving changes.

7. After you have entered all the necessary information on the DM File template, you need to select the parts.   For details, refer to the Selecting Parts

8. After you have entered this information, click the close box to save the work order.

See Also **...**

Overview

Modifying a work Order.

Printing a DM Work Order.

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Deleting a DM Work Order.

Modifying a DM Active File work Order

Follow these steps to modify an existing DM work order.

1. Click the File option on the Main Menu.   The File menu displays.

2. Click the DM Active option (or you may click the DM Quick Icon).   The Demand Maintenance Active File template displays showing a defined work order.

3. Go to the job you wish to modify by clicking the next and previous arrows on the Bottom Window Bar or using the Browsing Table on the Demand Number parameter. You may also use the parameter Browsing Table on the Equipment Number to view all Work orders currently associated with a specified piece of equipment.

4. Make your changes.   When you are finished, close the DM Work Order window to save your changes.

See Also ...

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Creating a DM Work Order.

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Printing a DM Active File Work Order

Click the Print icon on the Demand Maintenance Active File to print the DM Work Order.
This will print the DM work order currently presented on your screen.

See Also **...**

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Creating a DM Work Order.

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Closing a DM Active File Work Order

All active DM work orders reside in the Demand Maintenance Active File.   When you close, the following occurs:
1. The work order is transferred from the DM Active File to the DM History Master File.   The DM History File shows all closed work orders.

2. For each part used on the work order, a new Quantity on Hand is calculated and written to the Inventory Master File.

3. All dates are updated in the DM History Master File.

In summary, the procedure to follow in closing a DM Work Order are:
   Enter the actual time the maintenance employee spent to finish the work and note any other notes in the notepad.

   Update all part information with the quantity that was actually used.

Steps
1. Click the File option on the Main Menu.   The menu displays.

2. Click the Demand Maintenance Active File option.

3. Go to the work order you wish to close by either using the Next and Previous arrows or by using the Demand Number lookup table.

4. Click the Parts List icon.   A list of parts assigned to this work order appears.   Modify as necessary by deleting parts that were not used or adding additional parts.

5. Modify the Employee ID field if there are any changes to be made.   Also, modify the Hours field to reflect the actual time spent on this work order.

6. Make any additional notes in the Notepad, if necessary.

7. Click the Close icon.   The message Are you sure you want to close this work order? appears.   Click OK to close.

The program will write this file to the DM History Master File and the message The work order closed successfully appears.   Click OK to acknowledge the message and the next active work order appears.   You may keep closing work orders or exit the Demand Maintenance Active Master File by closing the window. This will close the work order and *move* it to the Demand Maintenance History File.

Before the Demand Maintenance Work Order is closed, all necessary changes must be made. *No changes are allowed once the work order has been closed.*

See Also **...**

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Printing a DM Work Order.

Deleting a DM Work Order.

Deleting a DM Active File Work Order

Follow these steps to permanently delete an erroneous or unwanted DM work order. Deleted work orders cannot be recovered.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the DM Active File option (or click the DM quick icon).   The Demand Maintenance Active File displays showing a defined work order .

3. Go to the job you wish to modify by clicking the next and previous arrows on the Bottom Window Bar or using the Browsing Table on the Demand Number parameter. You may also use the parameter Browsing Table on the Equipment Number to view all work orders currently associated with a specified piece of equipment.

4. Click the Delete icon.   The work order is now deleted.

See Also **...**

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View DM History File

To view a closed Demand Maintenance Work Order:

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Demand Maintenance History File option.   The DM History File template displays showing a defined work order

3. Go to the job you wish to view by clicking the next and previous arrows on the Bottom Window Bar or using the Browsing Table on the Demand Number parameter.   You may also use the parameter Browsing Table on the Equipment Number to view all work orders currently associated with a specified piece of equipment.

4. Note the Date Closed field has been filled in with the close date.

5. When you are finished viewing, close the DM History File window.

Creating a PM Master File Work Order

Follow these steps to create a preventive maintenance work order. A PM work order may be specific to a single piece of equipment (#P100 Press), a group of similar units (all 10T rooftop A/C units), or simply a location (mow East lawn).

1. Click the File option on the Main menu.   The File menu displays.

2. Click the Preventive Maintenance Master File option.   The Preventive Maintenance Master File template displays   showing a defined work order.

3. Click the New button.   The screen clears for you to enter your new work order.

4. Type a unique Job Number for this work order and press Tab.   The Job Number entry turns gray, which means it is stored in the data base and becomes read-only (cannot be changed).

5. Define the Equipment Number of the equipment requiring maintenance by clicking the down arrow in the Equipment Number field and selecting a defined piece of equipment.   The Equipment Name and Location fields are filled in for you.

6. Type in all the other information required for this work order. Use the Browsing Table to help you enter employee information.

    Novice calculates the values of some of the parameters; refer to _Equations used_ for details.

    If you want to type in some notes about this equipment, such as purchasing details or equipment breakdown history, click the Notes button.   The Notes window displays. After you are done with note taking, close the Notes window.   The message Do you want to save your changes appears.   Click Yes to save or No to escape without saving changes.

7. After you have entered all the necessary information on the PM Master File template, you need to select the parts.   For details, refer to the Selecting Parts

8. After you have entered this information, click the close box to save the work order.

Equations Used

Example

See Also **...**

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Activating a PM Master File Work Order

Preventive Maintenance Work Orders will automatically activate and move to the PM Active File on the Next Scheduled date.   However, you may manually activate a PM work order before the scheduled activation date if you wish.

Follow these steps to manually activate a Preventive Maintenance Work Order:
1. Click the File option on the Main Menu.   The File menu appears.

2. Click the Preventive Maintenance Master File option.   The Preventive Maintenance Master File appears, showing a defined PM Work Order

3. Click the Activate button (or select Activate Work Order from the Utilities Menu).   The message Are you sure you want to activate this work order appears.   Click OK to activate.

4. The message This work order is now active appears.   To print or close this work order, open the Preventive Maintenance Active File

See Also **...**

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<u>Deleting a PM Work Order.</u>

Modifying a PM Master File Work Order

Follow these steps to modify an existing PM work order.

1. Click the File option on the Main Menu.   The File menu displays.

2. Click the Preventive Maintenance option.   The Preventive Maintenance File template displays showing a defined work order.

3. Go to the job you wish to modify by clicking the next and previous arrows on the Bottom Window Bar or using the Browsing Table on the Job Number parameter.   You may also use the parameter Browsing Table on the Equipment Number to view all work orders currently associated with a specified piece of equipment.

4. Make your changes.   When you are finished, close the PM Work Order window to save your changes.

See Also **...**

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Printing a PM Master File Work Order

To print a PM work order, the work order must be active.   Therefore, you must print from the Preventive Maintenance Active File.
Click the Print icon on the Preventive Maintenance Active File to print the PM Work Order. This will print the PM work order currently presented on your screen.

See Also **...**

Overview

Creating a PM Work Order.

Activating a PM Work Order.

Modifying a PM Work Order.

Closing a PM Work Order.

Deleting a PM Work Order.

Closing a PM Master File Work Order

To Close a PM work order, it must currently reside in the PM Active Master File.   When you close, the following occurs:

1. The work order is transferred from the PM Active File to the PM History Master File.   The PM History File shows all closed work orders.

2. For each part used on the work order, a new Quantity on Hand is calculated and written to the Inventory Master File.

3. All dates are updated in the PM History Master File.

In summary, the procedure to follow in closing a PM Work Order are:
   Enter the actual time the maintenance employee spent to finish the work and note any other notes in the notepad.

   Update all part information with the quantity that was actually used.

Steps

1. Click the File option on the Main Menu.   The menu displays.

2. Click the Preventive Maintenance Active File option.   The Preventive Maintenance Active File appears, showing a defined work order file.

3   Go to the work order you wish to close by either using the Next and Previous arrows or by using the Job Number lookup table.

4. Click the Parts List icon.   A list of parts assigned to this work order appears.   Modify as necessary by deleting parts that were not used or adding additional parts.

5. Modify the Employee ID field if there are any changes to be made.   Also, modify the Hours field to reflect the actual time spent on this work order.

6. Make any additional notes in the Notepad, if necessary.

7. Click the Close icon.   The message Are you sure you want to close this work order? appears.   Click OK to close.

The program will write this file to the PM History Master File and the message The work order closed successfully appears.   Click OK to acknowledge the message and the next active work order appears.   You may keep closing work orders or exit the Preventive Maintenance Active Master File by closing the window.

Before the Preventive Maintenance Work Order is closed, all necessary changes must be made. *No changes are allowed once the work order has been closed.*

See Also **...**

Deleting a PM Master File Work Order

Follow these steps to permanently delete an erroneous or unwanted PM work order. Deleted work orders cannot be recovered.

1. Click the File option on the Main menu.   The File menu displays.

2. Click the PM File option.   The Preventive Maintenance Master File displays showing a defined work order .

3. Go to the job you wish to modify by clicking the next and previous arrows on the Bottom Window Bar or using the Browsing Table on the Demand Number parameter. You may also use the parameter Browsing Table on the Equipment Number to view all work orders currently associated with a specified piece of equipment.

4. Click the Delete icon.   The work order is now deleted.

See Also **...**

Overview

Creating a PM Work Order.

Activating a PM Work Order.

Modifying a PM Work Order.

Printing a PM Work Order.

Closing a PM Work Order.

Modify a PM Active File Work Order

Follow these steps to modify an existing PM Active work order.   Modifications made here will be recorded to the PM History File when the work order is closed.   Note that any modifications made in the PM Active file do not effect the master work order located in the Preventive Maintenance Master File.

1. Click the File option on the Main Menu.   The File menu displays.

2. Click the Preventive Maintenance option.   The Preventive Maintenance Active File template displays showing a defined work order.

3. Go to the job you wish to modify by clicking the next and previous arrows on the Bottom Window Bar or using the Browsing Table on the Job Number parameter.   You may also use the parameter Browsing Table on the Equipment Number to view all work orders currently associated with a specified piece of equipment.

4. Make your changes.   When you are finished, close the Preventive Maintenance Active File window to save your changes.

See Also **...**

Printing a PM Work Order.
Closing a PM Work Order.

Printing a PM Active File Work Order

Click the Print icon on the Preventive Maintenance Active File or select Print Work Order from the Utilities Menu to print the PM Work Order.   This will print the PM work order currently presented on your screen.

See Also **...**

Overview

Modify a Work Order.

Closing a PM Work Order.

Closing a PM Active File Work Order

Before the Preventive Maintenance Active Work Order is closed, all necessary changes must be made. *No changes are allowed once the work order has been closed.*

1. Click the File option on the Main Menu.   The menu displays.

2. Click the Preventive Maintenance Active File option.   The PM Active File displays.

3. Go to the work order you wish to close by either using the Next and Previous arrows or by using the Job Number lookup table.

4. Click the Parts List icon (or select Parts List from the Utilities Menu).   A list of parts assigned to this work order appears.   Modify as necessary by deleting parts that were no used or adding additional parts.

5. Modify the Employee ID field if there are any changes to be made.   Also, modify the Hours field to reflect the actual time spent on this work order.

6. Make any additional notes in the Notepad, if necessary.

7. Click the Close icon (or select Close Work Order from the Utilities Menu).   The message Are you sure you want to close this work order? appears.   Click OK to close.

The program will write this file to the PM History File and the message The work order closed successfully appears.   Click OK to acknowledge the message and the next active work order appears.   You may keep closing work orders or exit the Preventive Maintenance Active File by closing the window.

This will close the work order and *Move* it to the Preventive Maintenance History File.   The work order master will then appear in the Preventive Maintenance Master File and the closed copy will appear in the PM History File.

See Also **...**

Overview

Modify a Work Order.

Printing a PM Work Order.

Viewing a Closed PM History File Work Order

To view a closed work order:
1. Click the File option on the Main menu.   The File menu displays.

2. Click the Preventive Maintenance History option.   The PM History Master File template displays.

3. Go to the job you wish to modify by clicking the next and previous arrows on the Bottom Window Bar or using the Browsing Table on the Job Number parameter.   You may also use the parameter Browsing Table on the Equipment Number to view all work orders currently associated with a specified piece of equipment.

4. Click Parts button to view which parts were used to complete this work order.

When you have finished viewing closed work orders, close the Preventive Maintenance History File window to exit the PM History File.

Starting Novice

When we   start Novice the program will load into memory.   Within seconds,   the Main
Menu, as shown below , entitled Maintenance Manager, will be displayed.

Main Menu

See Also **...**

Learning the basics.

Menu Items

Toolbars and tables

Recommendations for entering data

Learning the basics

Novice functions may be started from the Main Menu , which is displayed when you start Novice.   Across the top menu bar of the Main Menu are the following options:

<u>F</u>ile, Utilities, Reports, Window, Help

When one of the options is clicked upon or when the Alt key and the underlined letter (i.e. **F, U, R, W, H)** of the option are held down simultaneously, a menu is displayed on the screen.

Options ...

<u>File</u>

<u>Utility</u>

<u>Report</u>

<u>Window</u>

Toolbars and Tables

Toolbars are used to allows users easier access to the various aspects of a computer system.   Novice has two basic toolbars: Top toolbar and Bottom toolbar with Bottom window bar for every screen.

Top Toolbar

Bottom Toolbar

Bottom Window Bar

Tables are used to look up and/or access information located in other Master Files. Novice uses two different types of tables: Browsing and Look up.

Browsing Table

Lookup Table

Recommendations for entering data.

Before you can use Novice Maintenance Management to issue work orders and print reports, you will need to first gather your equipment information and perform some data entry chores.   For example, you will need to enter the names of your maintenance people and the equipment they will service before you can issue any work orders against that equipment.   We suggest that you follow the recommended sequence for data entry.

You may find that for your organization, not all steps are required.   Also, you may find shortcuts.   For example, if at first you just want to use Novice to issue demand maintenance work orders, enter the personnel who will do the work and the equipment to be serviced.   That is all you need to create a bare bones system.   Eventually, though, you will want to follow all the steps presented here , which, when complete, will create a full system.

See Also **...**
Steps involved in entering data

Steps involved in Entering Data

Steps to follow when entering data into your Novice Maintenance Management software system.

Gathering Data

Before you begin, have at your fingertips as much information as possible on your employees and equipment. Record your information on forms.   Once completed, you can hand these forms to a typist who can efficiently enter the data   into Novice Maintenance Management.

Enter Personnel Information

Enter all maintenance staff personnel information in the Employee Master File.   Each employee has a separate record.

Enter Your Vendors

After you have gathered the information for your vendors, you will want to add the vendors to the Vendor Master File.   On the master file, try to provide all the data you can. One of the required items is a vendor code number.   Novice organizes your vendors by this code.   You may choose any number you wish, as long as it make sense for your organization.   For example, if your purchasing department uses certain numbers to identify the different vendors, it may be wise to use these same numbers.   Of course, you may want to develop your own logical numbering scheme for the vendor codes.

Record Your Inventory

After you have gathered information on your inventory items, add each item to the Inventory File.   Provide all the information as best you can.   If it make sense to your organization, categorize the inventory items according to the different types, such as electrical, mechanical, or pneumatic parts.   If you currently have numbering system, you can use it as it is.

Entering Your Equipment

After you have gathered the information for your equipment, add each piece to the Equipment Master File.   Equipment may include:

air handlers, boilers, chillers, fans

buildings and grounds

vehicles

Group equipment by: (the following are examples)

common type of equipment

department

location

Choose some sort of numbering scheme.   On the Equipment Master File template, you will need to specify a unique equipment number for each piece.   If you have an existing numbering scheme, you may continue to use it with Novice, as long as the numbers are

within the 24 character limit.   If you do not have an equipment numbering system, consider developing a logical numbering system.

For example, separate equipment numbers by 100, 500, or 1,000 for major subgroups.   If the facility is small and you do not foresee the need for an equipment numbering system, you can enter the equipment name in the Equipment No. field, as long as it is unique.   If you have more than one unit of similar equipment, use names like CHILLER01, CHILLER02, etc.

Define PM Procedures

For each piece of equipment, identify and define all the PM procedures needed for complete maintenance cycles.   PM Job Numbers can be categorized by work type, interval, equipment type, or by any other meaningful method of grouping related procedures.

Examples

Define DM Procedures

By its nature, Demand Maintenance is less inclined to description by routine tasks. Demand Maintenance work order numbers are assigned by Novice in sequential order number.

After you have completed building your Novice Maintenance Management files, you are ready to start scheduling maintenance, generating work orders, and employing Novice to improve your facilitys day-to-day operations.

In addition to the functions just discussed, there are several other Novice Maintenance Management functions available, such as Reports and Graphs, that you can use at any time.

L100-07   Weekly lube of Equip # 100

         I100-03   Monthly inspection of Equip # 100

         TEST01   Compressor leakdown testmonthly

         TEST02   Daily safety check of pop off valve

         AH180F   Semiannual filter repl for air handlers

Menu Items

File
Utility
Report
Window

File

The File menu(as shown below) allows you to access the multiple files, change your print setup, and exit the program.

Equipment

Inventory

Preventive Maintenance Master File

Preventive Maintenance Active File

Preventive Maintenance History File

Demand Maintenance Active File

Demand Maintenance History File

Employees

Print Setup

Print

Exit

Add/delete records; record additional information about equipment

Add, delete and modify items in inventory.

Add, delete records; record additional information about vendors.

Add, delete, modify and schedule PM work orders.

Deletes, modifies, print and close PM work orders.

Displays all closed PM work orders that are contained in the history file.   For reference only; no modification allowed.

Add, delete, print, and close DM work orders.

Displays all closed DM work orders that are contained in the history file.   For reference only; no modifications allowed.

Add, delete records; record additional information about employees.

Select printing options.

Start printing option directly.

Exit Novice and return to Windows.

Utilities

The **<u>U</u>tilities** menu (as shown below) allows the user to reindex the Novice databases.

<u>Reindex Database.</u>

<u>New Record</u>

<u>Delete Record</u>

<u>Edit Notes</u>

<u>Work Order Parts</u>

<u>Activate Work Order Parts</u>

<u>Close Work Order</u>

Reports

The **<u>Reports</u>** menu allows you to view and print the Preventive and Demand Maintenance Cost History graphs and various reports.

<u>Graphs.</u>

<u>Asset Report</u>

<u>DM History Report</u>

<u>Employee Report</u>

<u>Equipment Report</u>

<u>Inventory Cost Report</u>

<u>Inventory Location Report</u>

<u>Inventory Reorder</u>

<u>Inventory Worksheet</u>

<u>PM History Report</u>

<u>Reorder List</u>

<u>Reorder List(Non-stock parts)</u>

<u>Vendor Reports</u>

Window

The **<u>W</u>indow** menu allows you to arrange multiple windows   or icons displayed simultaneously on the screen, display or hide the top and bottom toolbars, and move between windows.

<u>Cascade</u>

<u>Tile</u>

<u>Arrange Icons</u>

<u>Top Toolbar</u>

<u>Bottom Toolbar</u>

Top Toolbar

The top toolbar consists of various function buttons   (as shown below) relative to the active file window.

New

Delete

Notepad

Parts List

Close

Print

Activate

Bottom toolbar

The bottom toolbar allows certain files to be accessed by clicking on the corresponding quick button .
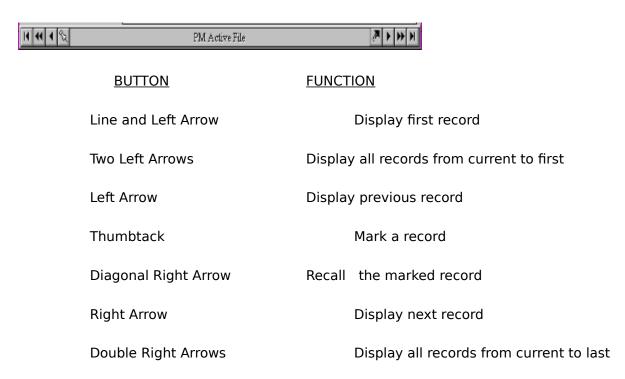
Equipment File

Inventory File

PM Active File

DM Active File

Employees File

Bottom window   bar

The bottom toolbar (as shown below) appears at the bottom of every window of an open file.   It allows you to go to the previous, next,   first, and last records of a file.   It also allows you to return to a specified   record. To specify a record, simply click the thumbtack button (fourth button from the left) on a desired record.   Continue to search through the records.   When   you wish to return to your specified record, click the diagonal arrow button (fourth button from the right) and the record should reappear.

PM Active File

BUTTON	FUNCTION
Line and Left Arrow	Display first record
Two Left Arrows	Display all records from current to first
Left Arrow	Display previous record
Thumbtack	Mark a record
Diagonal Right Arrow	Recall the marked record
Right Arrow	Display next record
Double Right Arrows	Display all records from current to last
Right Arrow and Line	Display last record

Add a record

Delete a record

Record additional information

Print work order

Close work order

Add parts

Schedule work orders to be performed

Rebuild indexes and compress records in database

Adds a new record in a database

Deletes a record from a database

Accesses the notes field for editing

Accesses the parts list from within the PM & DM Master Files

Manually activates a preventive work order

Closes work orders for preventive or demand maintenance

Asset #, Equipment #, Equipment Name, Asset Cost

Equipment #, Equipment Name, DM #, Date Closed

Employee ID, Employee Name, Supervisor, Dept.

Equipment #, Location, Asset #, Equipment Name, Mfg.

Part #, Part Name, Qty on Hand, Avg. Cost, Carry Cost, Total Cost

Part #, Part Name, Location, Qty on Hand

Part #, Part Name, Qty on Hand, Reorder Point

Location, Part #, Part Name, Physical Count

Equipment #, Equipment Name, Job #, Procedure Description, Employee Name, Date Closed, Hours

Vendor Code, Part #, Part Name, Qty on Hand, Reorder Point

Vendor Code, Part #, Part Name, Qty on Hand, Reorder Point

Vendor Code, Vendor Name, Contact

Position windows on top of each other diagonally across the screen

Position windows on top of each other vertically on the screen

Position icons anywhere on the screen

Display toolbar (if checked); Hide toolbar (if unchecked)

Browsing Table

You may browse a table of the records within any file by double-clicking on the key field name to be used as the index within the master file screen.   Key field names are italicized and appear green when clicked upon.   After double-clicking on the key field name, the browsing table will appear.   To retrieve a specific record from this table, simply click on it once to highlight it, and close the window.   You may conveniently modify numerous records through the table browsing feature.

See Also **...**

Lookup Table

Lookup table

A lookup table allows certain field data to be pulled from a record in one file and placed in a new or modified record of another file. For example, a vendor code and name from the Vendor File may be inserted into the vendor code and name fields of a new record in the Inventory File.

To display a lookup table, simply click on the down-arrow button next to the vendor code in the Inventory File.   In this table, scroll through the list of choices using the scroll bar, and then click on the appropriate vendor.   The chosen vendor code and name will then be inserted into the new record.

If the list of choices is long, you may scroll through the choices from any point within the list by typing the first letter or number of a vendor code in the box.   The first data in the list beginning with this letter or number will appear in the box.   Continue to hit this letter or number to scroll through all of the choices beginning with this letter or number, and/or click the down-arrow button to display the lookup table beginning at this point.   Then highlight the vendor of   your choice.

Every vendor code, employee ID, or equipment number field having a down-arrow button next to it contains a lookup table .   The following master files have lookup tables: Equipment, Inventory, PM Master, PM Active, and DM Active.

See Also **...**

Browsing Table

Selecting Parts

Follow these steps to add or select which parts, if any, an employee may need to complete this DM/PM job. The DM/PM File is linked to the Inventory File so you may select a previously defined part by calling up a Lookup Table and selecting the part number.

With the DM/PM File template displayed:
1. Click the Parts icon.   The Work Order Parts Window displays.

2. Click the down arrow within the Part Number field to pull up the list of parts in Inventory. Select your chosen part by clicking on the Part Name. The selected part is now added to the Parts list.   Tab to the Number of Parts field and fill the quantity of parts needed to complete this work order.   Press Tab to add another part.

3. When you have completed adding parts, close the Parts Information window.

4. Close the DM/PM File window to save the work order.

In addition to adding a part to the list, you can also modify and delete parts that are already on the list.

To modify a part, highlight the part in the list you want to change by clicking on it.   This will bring up the down arrow to access the drop down list of all parts in Inventory.   Click the down arrow and select your new part.   Once the new part is highlighted, it will replace the old part on the Parts List.

To delete a part, highlight the part in the Work Order Parts window by clicking in the box to the left of Part Number.   The selected part is now highlighted.   Press Delete on your keyboard.   The message   You have selected 1 row.   Choose OK to delete the selected rows or Cancel to exit. is displayed. Click OK to delete the part or Cancel to cancel the delete command.

When the work order is closed, Novice reduces the Quantity on Hand according to the parts used from the list.

Graphs

You use the Graphs option to display and print graphs that can be used for analyzing and reporting data base information. This option is provided by a Graphics server that takes data from Novice and represents it graphically. You can then use these graphs in presentations or for helping you make decisions.

Novice offers two different graphs

PM Cost History: shows the accumulated parts cost for Preventive Maintenance work orders for a specified period of time.

DM Cost History: shows the accumulated parts cost for Demand Maintenance work orders for a specified period of time.

These are the only graphs available. Novice does not allow you to create custom graphs.

See Also **...**

Displaying a Graph

Printing a Graph

Displaying a Graph

Follow these steps to display a Novice graph.

1. Click the Reports option on the Main menu.   The Reports menu displays.

2. Click the Graphs option.   The Graphs menu displays, showing the graphs that are available.

3. Click on the graph you want to display and/or print.

   A Time Range dialog box displays

4. Type a starting and ending date for the graph.   The ending date must be two months later than the starting date, or the message You   must specify a period greater or equal to two months displays.   Click OK.

Novice now creates and displays the graph.

See Also **...**

<u>Printing a Graph</u>

Printing a Graph

Follow these steps to print a graph. A graph must be currently displayed and the printer must be on-line and ready.

1. On the Graph window, click the Print button.   A Print dialog box displays, showing on which printer the graph is being printed.
2. The graph will now print to the selected printer.   Click Cancel to stop printing.

See Also **...**

Displaying a Graph

Three values in the PM Master File are obtained from equations.   They are:

1. Next Scheduled
2. Active Date
3. Last Scheduled

The equations for these dates are as follows:

Next Scheduled Occurrence = Date Started + Cycle

Active Date = Next Scheduled Occurrence   Advance WO By

Last Scheduled Occurrence = Next Scheduled Occurrence

The equations are based on the Date Started, not the Close Date.

Given: Date Started = 4/17/93,   Cycle = 7 days,   Advance WO By = 2

4/17/93   (Date Started)
        7   (Cycle)
-

4/24/93   (Next Scheduled Occurrence)
        2   (Advance WO By)

4/22/93   (Active Date)
4/24/93   (Last Scheduled Occurrence)

Add a Record to ...

Employee
Equipment
Inventory
Vendor

Create a Work Order for ..

[Demand Maintenance Active File](#)
[Preventive Maintenance Master File](#)

Modify a Record of ..

Employee
Equipment
Inventory
Vendor
Demand Maintenance Active File
Preventive Maintenance Master File

Browse Records of ..

Equipment

Vendor

View a Closed Work Order of ..

[Demand Maintenance History File](#)
[Preventive Maintenance History File](#)

Print

[Demand Maintenance Active File](#)
[Preventive Maintenance Active File](#)
[Graphs](#)

Deleting Records from...

Employee
Equipment
Inventory
Vendor
Demand Maintenance Active File
Preventive Maintenance Master File

Close a Work Order for ..

Demand Maintenance Active File
Preventive Maintenance Master File