MaintSmart
Enterprise
version 5.0

User
Guide
for
Purchasing and Inventory

(volume 2 of 3)

Purchase Process - An Overview

Overview of the MaintSmart Purchasing Process

Access to purchasing in MaintSmart is controlled though the **Permissions** and **Passwords** screen in the **Program Configuration** screen. Purchasing permissions may be set to skip certain normal purchasing functions if needed. For example:

Normal Purchasing Process:

A.) User 1 Creates purchase requisition
B.) User 2 Approves (line item) requisition
C.) User 3 Releases approved items to a P.O. for purchase.
D.) User 4 Receives purchased items into stock.
E.) User 5 Matches received PO items to an invoice number (reference fields provided for this purpose). **NOTE**: This step is optional.
F.) User 6 Uses stock items on a work order or other use.
NOTE: user may also have permissions to create, edit or print request for quote(s) from vendors.

Accelerated Purchasing Process:

A.) User 1 Creates a P.O. with needed items.
B.) User 1 or User 2 receives purchased items into stock.
C.) User 1 or User 2 or User 3 uses stock items on a work order or other use.

Purchase Requisitions

Purchase requisitions may be created from a **Request for Quote**, directly from the **Purchase Requisition** screen, from the **Hot Sheet,** or graphically (drag and drop) from the **Inventory Tree**. **Vendor Quote Requests** may be easily created from a requisition (or a requisition may be easily created from a quote request. Requisitions may then be approved by the proper person and released to a P.O. for purchasing.

Approval of requisition line items is governed by the logged in approver's cost/item limit. In some cases multiple electronic signatures must be obtained in order to approve high cost items. These approval levels are set in the **Program Configuration** screen by cost limit and number of signatures needed for final approval of a particular requisition line item.

Purchase Orders

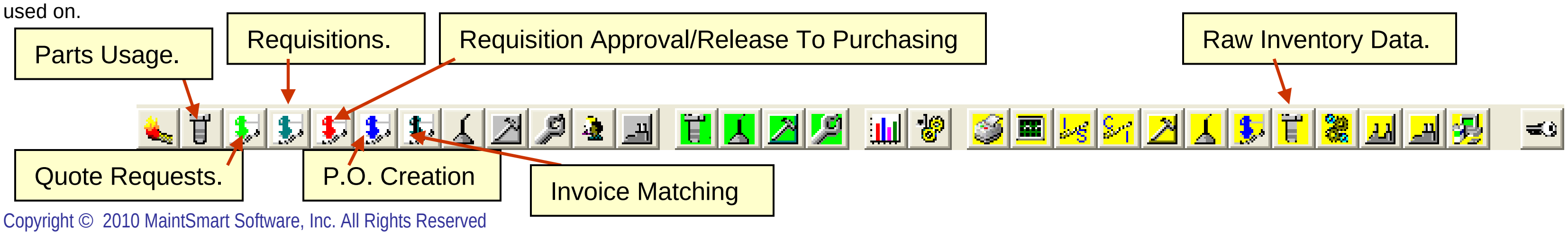
To maintain consistency with previous versions of MaintSmart we have provided permissions that may be set in **Program Configuration** that make it possible to create a P.O. directly without going through the requisition process. In most cases you'll probably want to use the **normal purchasing process** described above.

Purchase orders provide a way to purchase stock items or services (through a work order). The basic process for P.O. creation is as follows:

A.) Create a P.O. (or other transaction type). This step involves entering general information about the transaction (P.O.) such as shipping contact information, vendor, etc. Shipping contact information fields may be automatically populated based upon user login. Transactions may also be duplicated with one button click if needed.
B.) Line items are added to the transaction (P.O.) .
C.) The P.O. may then be printed, faxed or emailed from MaintSmart.

Receiving Purchased Items

Items are received either by line item (partial receives are possible too) or by the entire P.O. Barcode labels, stock location lists, etc. may be printed for the received items also. Once items have been received these items become available for use. Used items may be easily returned to stock and these same items may be also returned to the vendor with very little effort. During this process of receiving and using items the raw inventory data is automatically adjusted to reflect receives and usage. Items that are used are linked to why, who and what equipment they were used on.



Cost Center Parents

Overview of Cost Center Parents: Cost Center Parents provide a way for you to group cost centers. Cost Center Parents are global and not plant dependent. In the case where you are working with multiple top-level hierarchy data items (multiple plants, etc.) you may group and evaluate all of these data items together by using cost center parents.

If you don't need to group your cost centers then simply create one cost center parent and add all cost centers to the same parent. To access the cost center parent screen you must have permissions: **Edit/Add Records To Other Plants , Add/Edit Cost Centers** and **Use Other Cost Centers**.

Adding a New Cost Center Parent: To add a cost center parent select from the button bar. Select menu item **Options>>Manage Cost Center Parents**. To add a new cost center parent you must have permission for this action. When **Manage Cost Center Parents** screen appears press the **New** button.

Enter the **Cost Center Parent Number** and **Cost Center Parent Description** then press **Save**. The Cost Center Parent Number is an alphanumeric field so enter letters or numbers in this field as needed. MaintSmart uses the Cost Center Parent Number and Description together when displaying the Cost Center Parent from drop-down boxes and other places. Once a Cost Center Parent is saved it will appear in the Cost Center Parent drop-down box on the Cost Center Configuration screen.

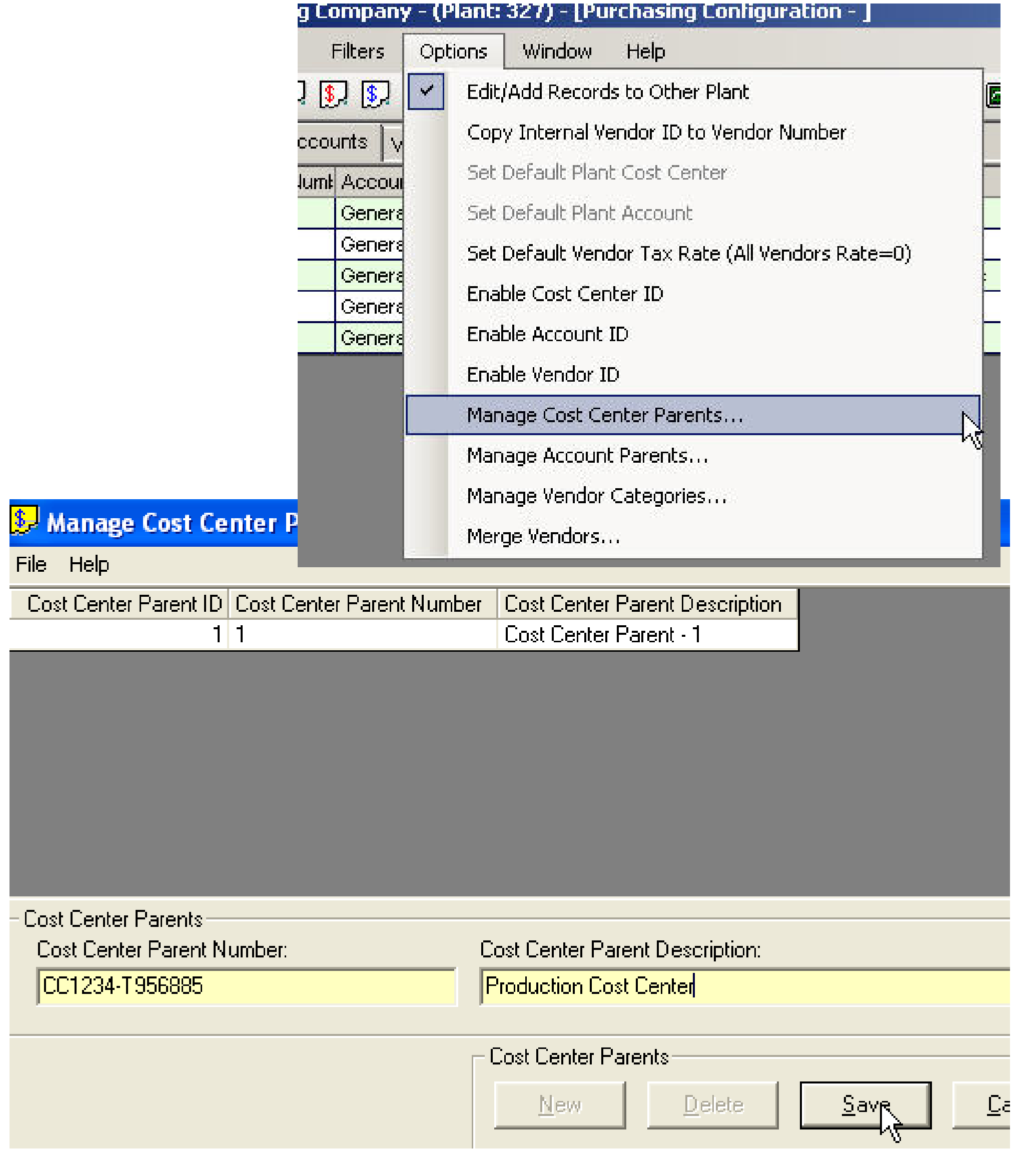
Editing a Cost Center: To edit a cost center parent select from the button bar. Select menu item **Options>>Manage Cost Center Parents**. To edit a cost center parent open the cost center parent screen then left mouse click the grid row containing the cost center parent you want to edit. Make changes in boxes below grid then press **Save**.

Deleting a Cost Center: **Warning:** Deleting cost center parent permanently deletes ALL records that have any reference to this cost center parent including but not limited to cost centers and purchase transaction records (that use those cost centers) and any inventory items contained in those purchase transactions.

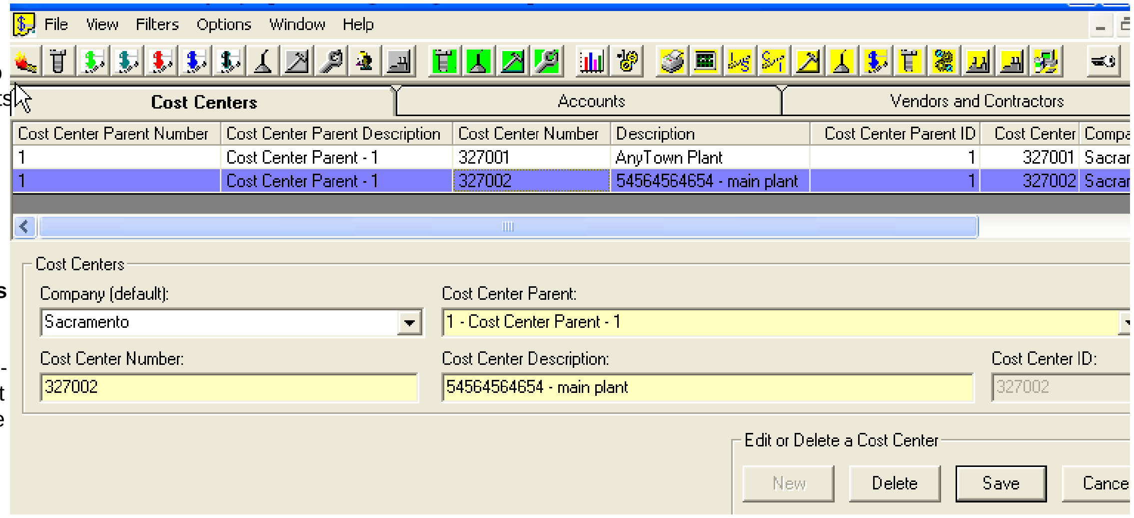
To access the cost center parent screen you must have permissions: **Edit/Add Records To Other Plants , Add/Edit Cost Centers** and **Use Other Cost Centers**.

To delete a cost center parent select from the button bar. To delete a cost center parent open the cost center parent screen then left mouse click the grid row containing the cost center parent you want to delete. Press **Delete**.

Note: You may be prompted to set the 'Allow Cascade Delete' option from the **Program Configuration** screen. To access program configuration you must have Administrator access rights



Cost Centers



Overview of Cost Centers: Cost centers may be used to groups costs from various sources. Cost centers may be linked to purchases, work orders, user name (as a default for the user) and equipment. Cost centers are linked to a plant but may also be contained by **Cost Center Parents**. Cost center parents are not plant specific. The cost center description consists of a cost center number and cost center name.

Adding a New Cost Center: To add a cost center select from the button bar. Select the tab labeled **Cost Centers**. You'll need the permission **Add/Edit Cost Centers** to access this screen. To add cost centers to other plants you'll need **Add/Edit Cost Centers**, **Edit/Add Records To Other Plants** and **Use Other Cost Centers** permissions.

Press **New** then select the plant to associate with the cost center from the drop-down box (if applicable). Next select a Cost Center Parent to associate the cost center with. Enter the cost center number. Enter a descriptive name to describe the cost center. Press **Save**.

Default Cost Center
Each user may be linked to a default cost center and account if needed. These defaults are used is various places in the program. You may also set a default cost center from the cost center screen as by clicking the row containing the cost center. Select menu items **Options>Set Default Cost Center.** This default cost center is only used if the user name-linked is default is not used. automatically used in various parts of the program if the user name linked default cost center is not configured.

Editing or Deleting a Cost Center:

To edit a cost center select from the button bar. Select the tab labeled **Cost Centers**. To edit or delete a cost center you must have permission to **Add/Edit Cost Centers**. Select a row from the grid containing the record you want to work with. Make needed changes to cost center. Press Save.

Warning: Deleting cost center permanently deletes ALL records that have any reference to this cost center including but not limited to purchase transaction records and any inventory items contained in those purchase transactions. To delete a cost center select the grid row containing the cost center you want to delete then press **Delete**.

To make changes to cost centers from other plants you'll need **Edit/Add Records to Other Plants**, **Add/Edit Cost Centers** and **Use Other Cost Centers** permissions.

It is possible to edit the internal cost center ID from the **Options** menu. This number is used by the program to provide uniqueness to the cost center and is created by the MaintSmart program when a new cost center is added. It is highly recommended that you do not change this number. Instead use the **Cost Center Number** field (alphanumeric) for cost center numbering purposes.

Account Parents

Overview of Account Parents: Account Parents provide a way for you to group Accounts. Account Parents are global and not plant dependent. In the case where you are working with multiple top-level hierarchy data items (multiple plants, etc.) you may group and evaluate all of these data items together by using account parents.

If you don't need to group your accounts then simply create one account parent and add all accounts to the same parent. To access the accounts parent screen you must have permissions: **Edit/Add Records To Other Plants , Add/Edit Accounts** and **Use Other Accounts**.

Adding a New Account Parent: To add a account parent select from the button bar. Select menu item **Options>>Manage Account Parents**. To add a new Account parent you must have permission for this action. When **Manage Account Parents** screen appears press the **New** button.

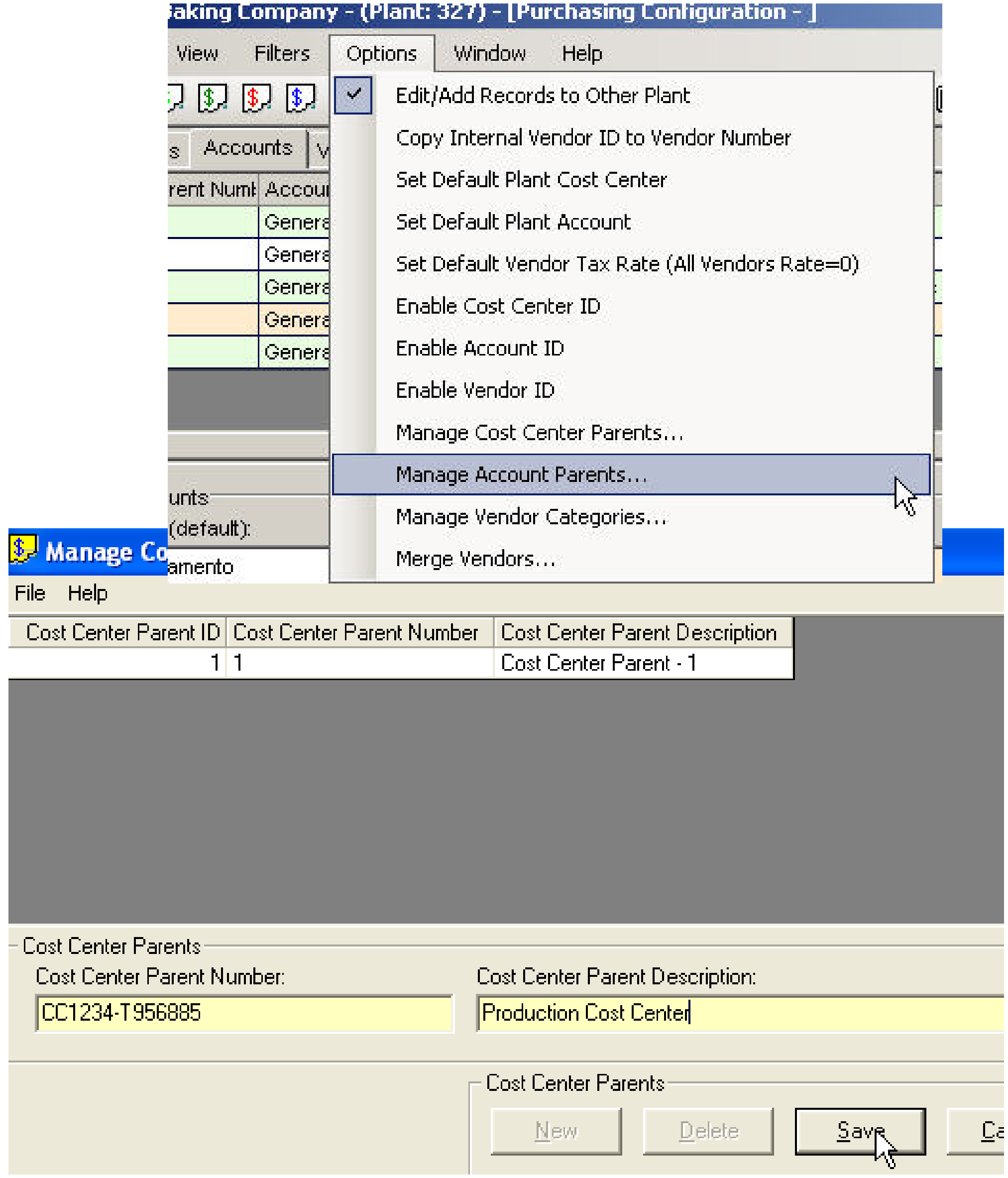
Enter the **Account Parent Number** and **Account Parent Description** then press **Save**. The Account Parent Number is an alphanumeric field so enter letters or numbers in this field as needed. MaintSmart uses the **Account Parent Number** and **Description** together when displaying the **Account Parent** from drop-down boxes and other places. Once a Account Parent is saved it will appear in the Account Parent drop-down box on the Account Configuration screen.

Editing a Account Parent: To add a account parent select from the button bar. Select menu item **Options>>Manage Account Parents**. To edit a account parent open the account parent screen then left mouse click the grid row containing the account parent you want to edit. Make changes in boxes below grid then press **Save**.

Deleting a Account Parent: **Warning:** Deleting account parent permanently deletes ALL records that have any reference to this account parent including but not limited to accounts and purchase transaction records (that use those accounts) and any inventory items contained in those purchase transactions.

To access the Account parent screen you must have permissions: **Edit/Add Records To Other Plants , Add/Edit Accounts** and **Use Other Accounts**.

To delete an account parent select from the button bar. To delete a account parent open the account parent screen then left mouse click the grid row containing the account parent you want to delete. Press **Delete**.

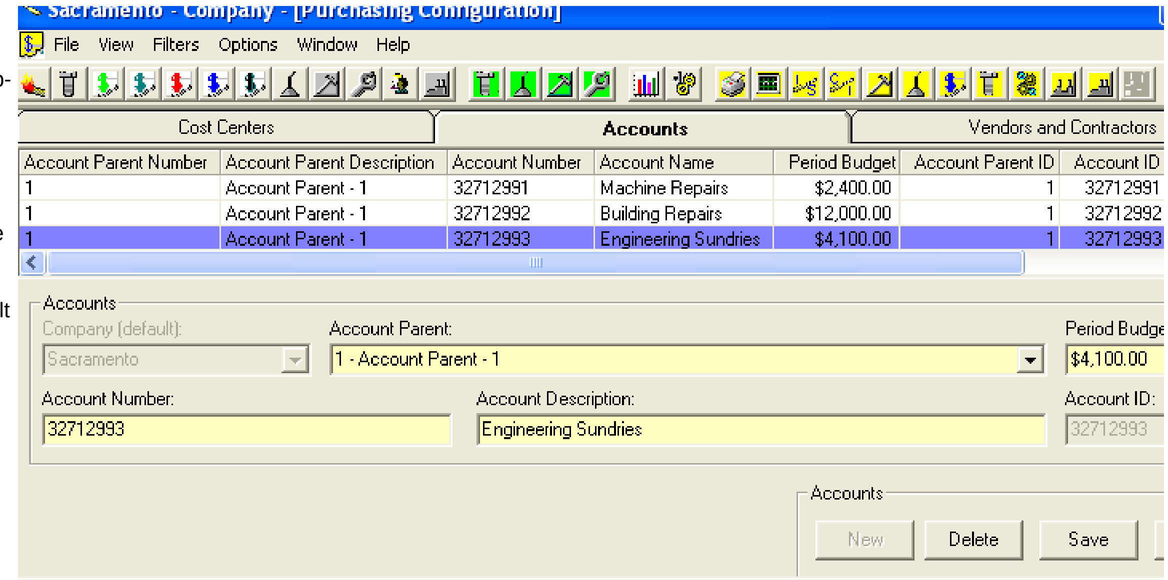


Accounts

Overview of Accounts: Accounts may be used to groups costs from various sources. Accounts may be linked to purchases, work orders, user name (as a default for the user) and equipment. Accounts are linked to a plant but may also be contained by **Account Parents**. Account parents are not plant specific. The account description consists of a account number and account name.

Adding a New Account: To add a account select from the button bar. Select the tab labeled **Accounts**. You'll need the permission **Add/Edit Accounts** to access this screen. To add accounts to other plants you'll need **Add/Edit Accounts**, **Edit/Add Records To Other Plants** and **Use Other Accounts** permissions.

Press **New** then select the plant to associate with the account from the drop-down box (if applicable). Next select a Account Parent to associate the account with. Enter the account number. Enter a descriptive name to describe the account. Enter a **Period Budget** (currency). Press **Save**.



Default Account

Each user may be linked to a default account and account if needed. These defaults are used is various places in the program. You may also set a default account from the account screen as by clicking the row containing the account. Select menu items **Options>Set Default Account.** This default account is only used if the user name-linked is default is not used. automatically used in various parts of the program if the user name linked default account is not configured.

Editing or Deleting a Account:

Warning: Deleting account permanently deletes ALL records that have any reference to this account including but not limited to purchase transaction records and any inventory items contained in those purchase transactions.

To edit a account select from the button bar. Select the tab labeled **Accounts**. To edit or delete a account you must have permission to **Add/Edit Accounts**. Select a row from the grid containing the record you want to work with. Make needed changes to account. Press Save.

To make changes to accounts from other plants you'll need **Edit/Add Records to Other Plants**, **Add/Edit Accounts** and **Use Other Accounts** permissions.

It is possible to edit the internal account ID from the **Options** menu. This number is used by the program to provide uniqueness to the account and is created by the MaintSmart program when a new account is added. It is highly recommended that you do not change this number. Instead use the **Account Number** field (alphanumeric) for account numbering purposes.

Vendors and Contractors

Overview of Vendors: Vendors are needed by MaintSmart for purchasing and replenishing stock items. Vendors may also be contractors. These contractors may be linked to a work order then the work order linked to a purchase transaction. Vendors may be activated or deactivated. Active vendors appear in the vendor list. Deactivating a vendor would be useful in the case you wanted to no loner wanted to use a particular vendor but didn't want to cascade delete all of the vendors old records.

Adding a New Vendor: To add a new vendor select from the button bar. Select the tab labeled **Vendors**. Press **New** then fill the text boxes with the requested information. Designate the vendor as global if using multple plants. Be sure to check **Activate Vendor** is you want the vendor to be accessible. Vendor ID numbers uniquely identify the vendor. This number is used internally by MaintSmart.

Editing or Deleting a Vendor:

Warning: Deleting a vendor permanently deletes ALL records that have any reference to this vendor including but not limited to purchase transaction records and any inventory items contained in those purchase transactions

To edit or delete a vendor select from the button bar. Select the tab labeled **Vendors**. Select the vendor record form the grid by clicking on the row containing the vendor. Change the information in the text boxes as needed. Press **Save** or **Delete** to permanently remove this vendor and All purchasing records associated with this vendor.

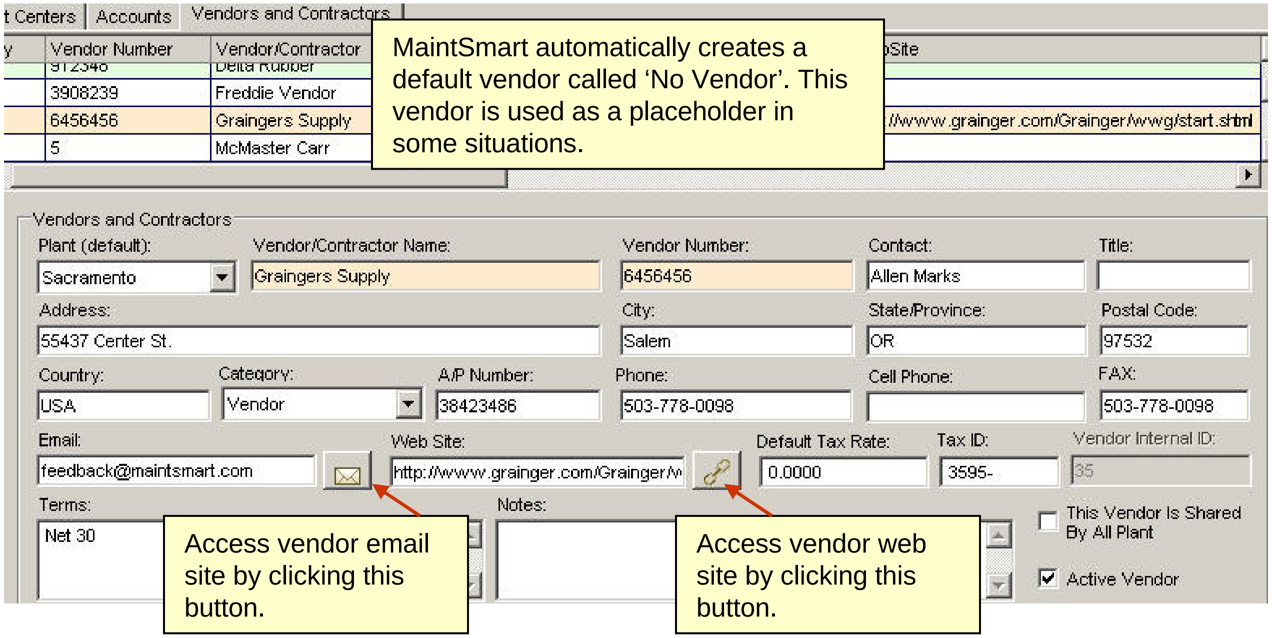
Global Vendors and Merging Vendors

You may also designate vendors as 'global'. Global vendors are useful when you have MaintSmart configured for multiple plants and would like to share the vendors between all plants rather than have plant specific vendors that may only be used and access from a particular plant. Vendors may be merged from multiple plants into global vendors one time. Please see the topic regarding Merging Vendors on the next page of this manual.

Preferred Vendors vs. Vendors

MaintSmart© uses inventory vendors in two different ways. For the purpose of purchasing vendors are associated with a particular purchase transaction. In this situation the vendor is the actual entity from which the inventory items are being purchased. Conversely a preferred vendor is simply a vendor that a particular inventory item is *usually* purchased from. Preferred vendors are used by MaintSmart to create re-order lists when parts stock falls below minimum levels. These reports do not actually have anything to do with any particular purchase transaction but merely display the parts that should be ordered and from which vendor the parts should be ordered.

More information and details of how to use preferred vendors is found in the inventory set-up section of this manual.



Merging Vendors

Overview of Global Vendors and Merging Vendors

NOTE: Merging vendors is a function designed for legacy users (MaintSmart 3.3 or lower) of MaintSmart that used multiple plants. In previous versions of MaintSmart each plant was required to have its own set of vendors. This created an issue when Plant A and Plant B used the same vendor. While there was a workaround for this MaintSmart 4.0 (and above) now have a way to use vendors across plants if needed. These are called global vendors.

This merge vendors utility provides a way for legacy MaintSmart users to combine two or vendors into one global vendor that may be shared by all plants. Vendors may be merged from multiple plants into global vendors one time. You must have Administrator permissions to merge vendors.

It is also strongly recommended that you back-up your database before merging vendors.

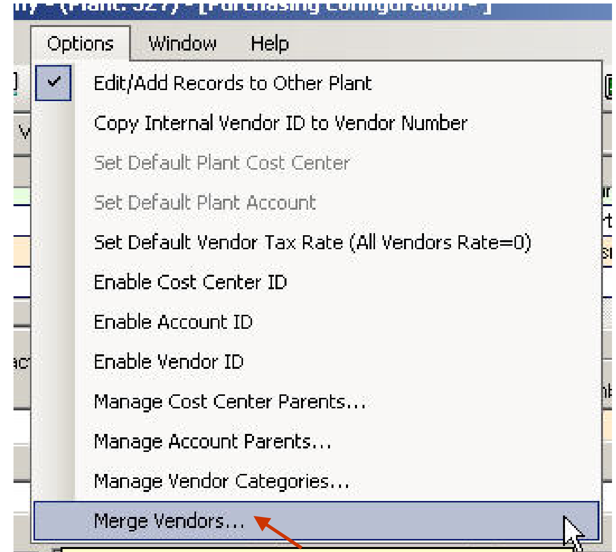
Considerations Prior to Merging Vendors (to create Global Vendors)

To access the Merge Vendor utility log in as an Administrator the open the **Purchasing Configuration** screen and select the menu items **Options>>Merge Vendors…**

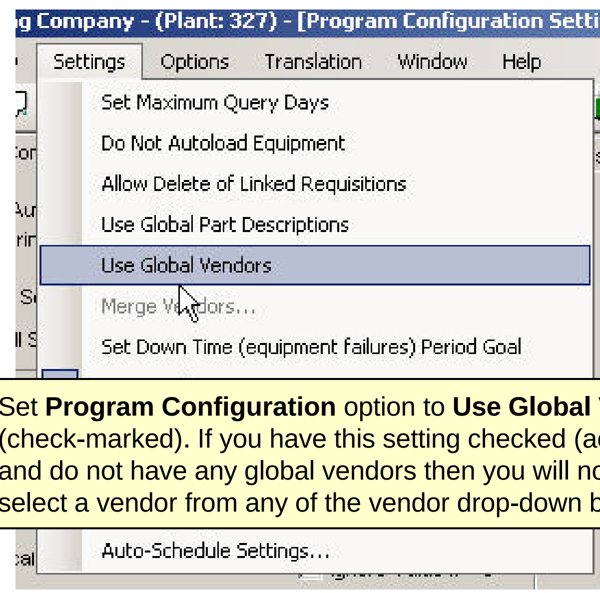
Here are a few considerations prior to merging your vendors:

1.) Merging vendors is used to combine vendors from Plant A, Plant B,… and make them available to all plants (global vendor). Even though available to all plants the vendor is still 'linked' to one plant.
2.) After merging vendors the source vendors should be deactivated. Check the deactivate vendor checkbox or manually deactivate from the vendors screen.
3.) Internally when a source vendor is merged with a target vendor the internal vendor ID (used by MaintSmart to identify the vendor) of the source vendor is changed to that of the target vendor. These changes are reflected in various parts of the program based upon the checkbox selections at the bottom of the **Merge Vendors** screen.
4.) Back up your database before merging vendors. These changes may be permanent.
5.) You need to designate at least one target vendor as a global vendor from the Vendor Configuration screen before merging vendors.
6.) Though its possible it doesn't make much sense in most cases to have some global and some non-global vendors. Usually you'd want them all to be one or the other.
7.) Once you have merged the vendors you must set the **Program Configuration** setting option to **Use Global Vendors**.

The next page provides a step by step instruction of merging vendors



Merge Vendors… menu item is only available to Administrators.



Set **Program Configuration** option to **Use Global Vendors** (check-marked). If you have this setting checked (activated) and do not have any global vendors then you will not be able to select a vendor from any of the vendor drop-down boxes.

Merging Vendors

Merging Vendors(to create Global Vendors)

To access the Merge Vendor utility log in as an Administrator the open the **Purchasing Configuration** screen and select the menu items **Options>>Merge Vendors…**

Step 1: Designate your vendors in one plant as global vendors by selecting each vendor in the data grid with a left mouse-click then checking the checkbox labeled This **Vendor Is Shared By All Plant**. Press **Save** after each edit.

Step 2: Click the menu item labeled **Options>>Merge Vendors…** to open the **Merge Vendors** utility screen.

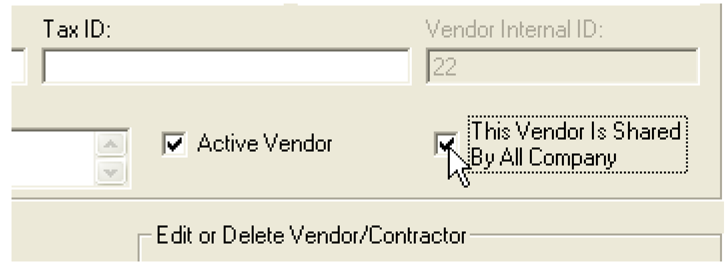
Step 3: Select the target plant. This is the plant that you designated the vendors a global vendors. Select the **Target Vendor** (this is the vendor that you want to merge the source vendor into).

Step 4: Select the Source Plant. The Source Vendor drop-down box loads with non-global vendors from the source plant. Select the source vendor to merge into the target vendor.

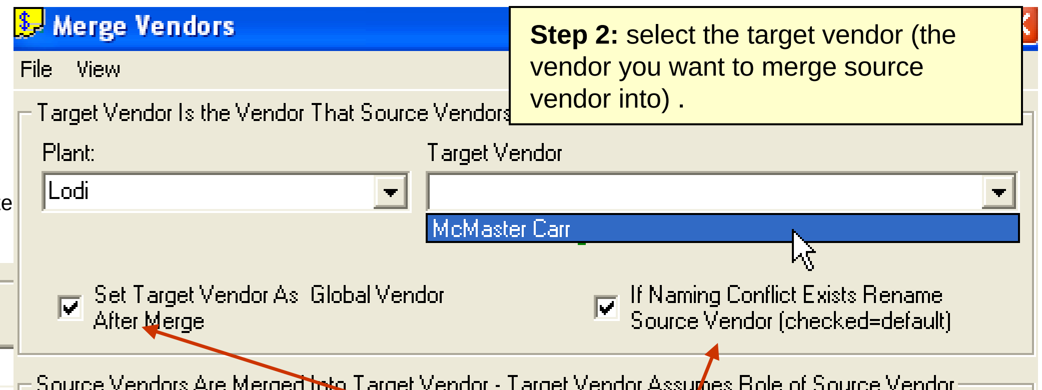
Step 5: Check all of the checkboxes on the screen (recommended).

Step 6: Press **Merge**.

NOTE: Be sure to set the Program Configuration menu item: **Settings>>Use Global Vendors** to checked. With this menu item checked only global vendors will display in vendor drop-down boxes. If all vendors are set to global and this menu item has not been checked then MaintSmart will not find any non-global vendors to populate the vendor drop-down boxes causing the vendor drop-down boxes to all be empty.

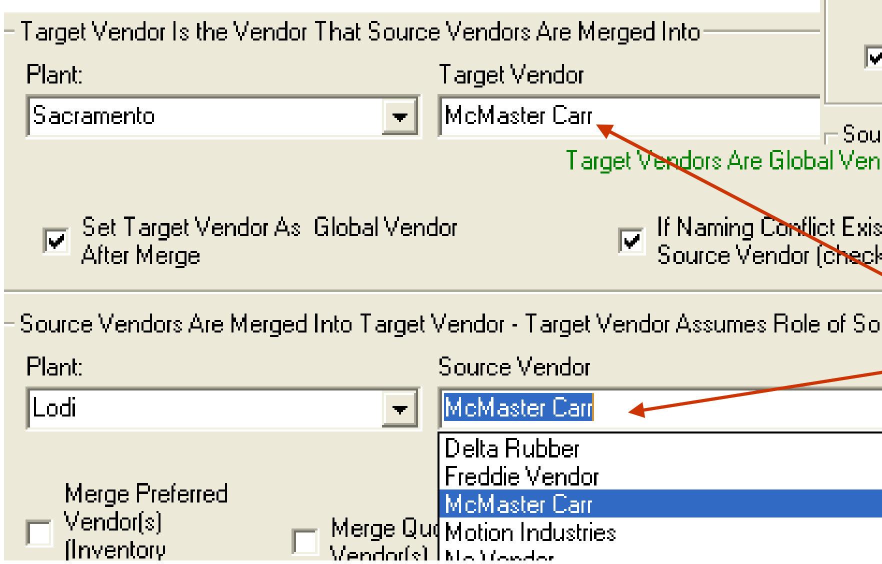


Step 1: designate target vendor as a **Global Vendor** or shared vendor.



Step 2: select the target vendor (the vendor you want to merge source vendor into) .

Checked is recommended.



Note: different plants. In this example vendors from Lodi are being merged into the global vendor with same name from Sacramento.

Inventory Set Up - Part Creation

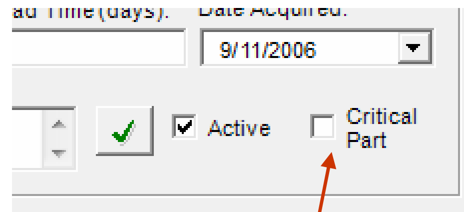
Overview of Inventory and Spare Parts: MaintSmart© uses internal ID numbers to track spare parts. Inventory set up is where you tell MaintSmart© what parts you have in stock. As new parts are acquired they are also added to the inventory data table. Once the part is entered an ID number is created and used to track inventory purchasing, receiving, usage, audits and minimum/maximum stock levels. This information is available to you at any time with very little effort. Reports are available too. By using the inventory section of this program you are able to track parts cost for each equipment item in your plant. When parts are used they are assigned to the equipment that they were used on, why they were used (down time, work order, PM, etc.), and who used the part. The cost of parts used on an equipment item is used in the analysis part of this program to determine the total cost of owning an equipment item during a user defined time period.

Adding a New Spare Part: To work with inventory set up and to add new parts to the parts inventory select from the button bar. When a new inventory spare part is added a internal ID number is automatically created by the program. This ID number is then used to identify the part. Spare part ID numbers may not be edited by the user.

Important: In the case where more than one plant exists it is best to create inventory IDs in one plant only and then copy the IDs to the other plant(s). The reason for this is to keep part ID numbers the same for a given part throughout all plants in your company. By doing so this allows parts to be readily identified by the same number in all plants. Conversely creating separate part IDs in each plant results in the same part having a different internal ID number for each plant. This is necessary for using the inter-plant inventory transfer function in MaintSmart.

Follow these steps to add an inventory item (spare part).

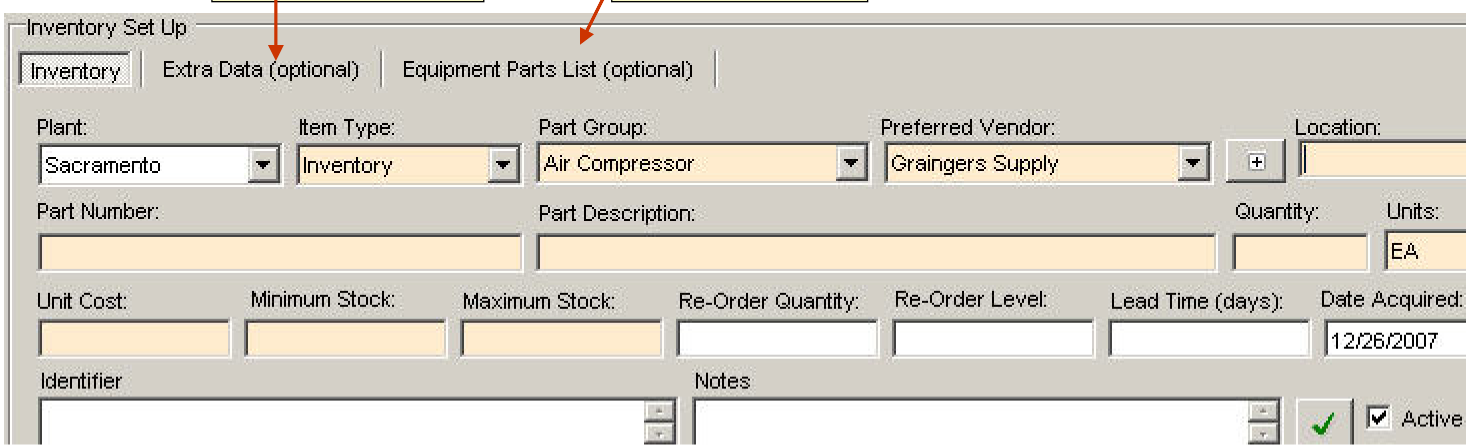
1. Press **New**.
2. Select plant to add new part to (may be unavailable).
3. Select item type (whether part is placed in inventory or not).
4. Associate the part with a part group. This makes it much easier to locate when the need arises.
5. Select a preferred vendor, if any.
6. Enter the part number and description in the designated text boxes.
7. Enter the quantity and the units.
8. Enter the unit cost. This may be your best estimate but preferably is the actual cost of the part including any freight and taxes.
9. The location should be concise to allow the part to be located quickly.
10. Enter the desired minimum and maximum stock levels for this part.
11. Enter the reorder quantity.
12. Enter the reorder level.
13. Enter the lead time.
14. Enter the date the part was acquired.
15. Add **Parts File Attachments** if needed.
16. Check (or not) Critical part checkbox.
17. Press **Save** to keep this record.



Check checkbox for Critical Part.

Six (6) user-defined fields

Link parts directly to physical equipment items.



Inventory Set Up - Part Creation

Editing or Deleting a Spare Part:

Warning: Deleting a spare part deletes all records that use that spare part ID including inventory records and inventory used records. When you attempt to delete a part that is referenced at more than one acquisition cost MaintSmart asks whether you want to delete the part only at the selected acquisition cost of delete this part number entirely.

Important: Try to avoid editing inventory quantities from the inventory set up screen. Rather use the Purchasing and Spare Parts Usage screen. By doing so records are accurately kept regarding parts acquisition and usage.

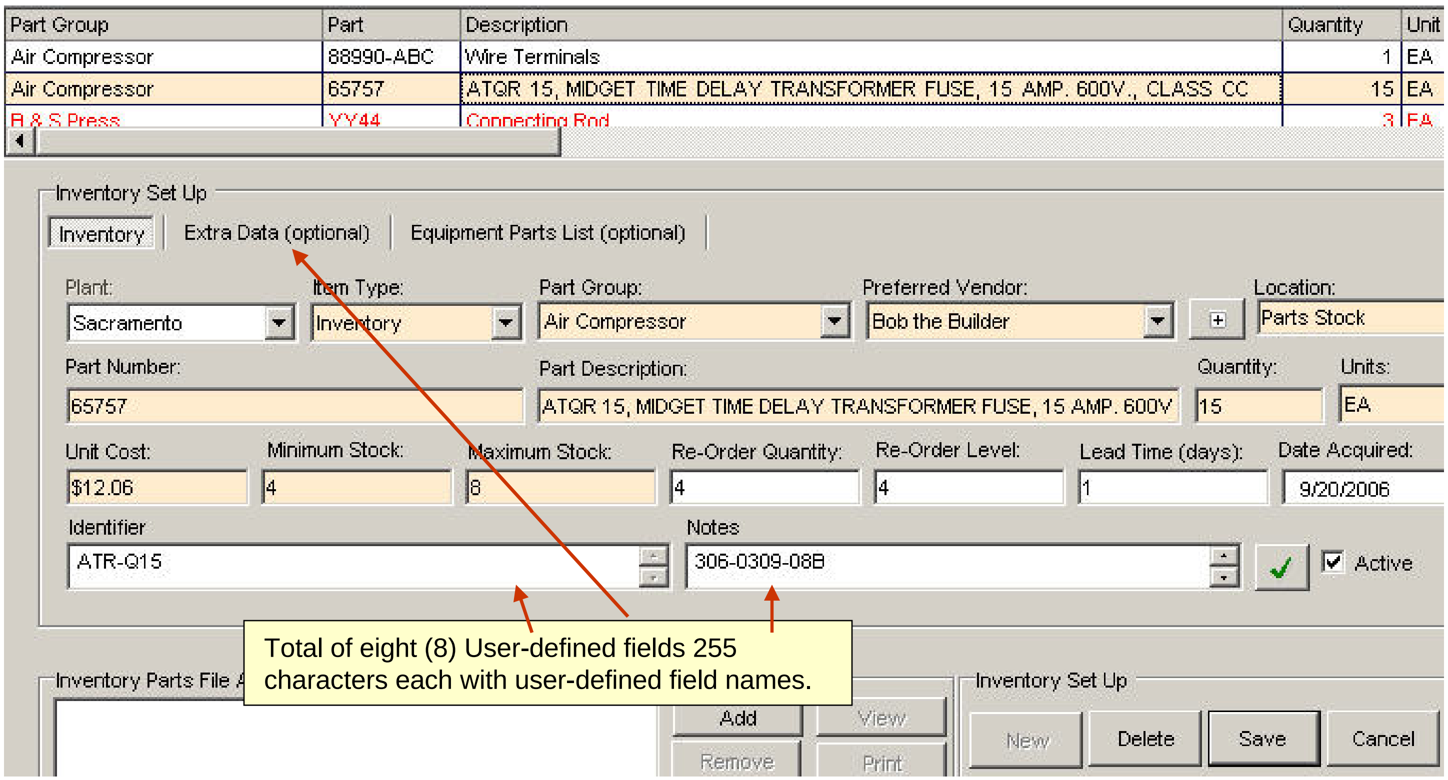
To work with inventory set up and to edit or delete parts in the parts inventory select from the button bar. To edit or delete a spare part left mouse-click on the grid row containing the part. To edit change the values in the boxes below the grid as needed then press **Save** to keep the changes. To delete the record select the record then press **Delete**.

Note: See pages 140-144 for information on how to create bar-coded inventory labels and how labels are useful for performing inventory audits or using spare parts.

User-Defined Data Fields

MaintSmart provides two global user-defined data fields and six plant specific. The names of these fields are user-defined. Each of these fields may contain up to 255 characters. The default names for these fields is “Identifier” and “Notes”. The identifier field also has the capability to produce reports grouped by this field.

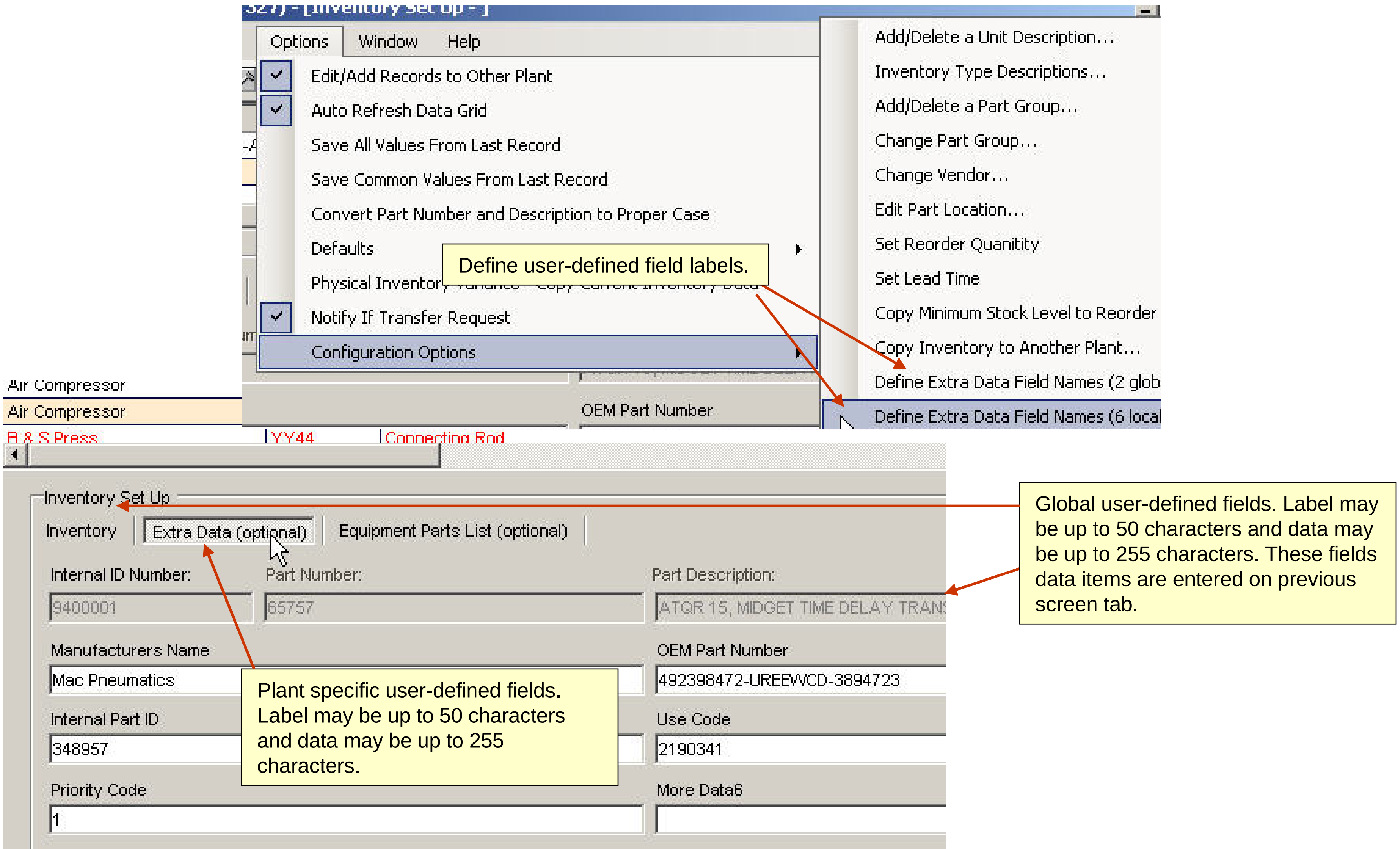
To change the names of one or both of these fields open the Inventory Configuration (Set-Up) screen. Select the menu items **Options>>Define Extra Data Field Names**. Enter the desired field name(s) in the input boxes that appear (up to 50 characters). Create an inventory report grouped by the first of these fields (“Identifier”) from the **File>>Print>>Report** menu item.



Inventory Set Up - Part Creation

Inventory Configuration - More:

Label and use up to six user-defined (plant specific) data fields and two additional global user defined data fields. To set the field names (labels) select the menu items as depicted below:



Inventory Set Up - Part Linking to Equipment

Inventory Configuration - Linking/Delinking Parts to Equipment Items:

Beginning in MaintSmart 4.0 you may now link parts directly to physical equipment items. Prior versions of MaintSmart provided ‘Part Groups’ for this purpose. Part groups could be named the same as an equipment item or could use more generic naming such as ‘bolts’, ‘pipe’, etc. Part groups are still available in MaintSmart 4.0 and should be used for filtering a grouping parts. Part-linking may be used in addition to part groups and a way to build specific parts lists for specific equipment items.

Linking Parts to Equipment

To link parts to a specific equipment item open the Inventory Configuration screen and select to screen tab **Equipment Parts List (optional)**. When this tab is selected a different grid display is shown above the control boxes. This grid is displaying linked items. This grid works differently than other data grids in MaintSmart in that left clicking the grid rows doesn’t place that row in edit mode. Follow these steps to link a part or multiple parts to an equipment item or multiple equipment items.

1. Click the **Link** radio button. Click the **Load Equipment** button to populate the equipment list.
2. Choose one of the filters methods and an appropriate filter if needed to limit the parts list. Click the **Load Inventory** button to load parts into the parts list.
3. Left mouse click the equipment you want to link parts to. It is not necessary to hold down the <CTRL> button to multi-select equipment or parts on this screen. To deselect an equipment item left click it a second time.
4. Left click the parts associated with this equipment(s) until the desired list is highlighted as shown below.
5. Click the **Link** button. This links all selected parts to all selected equipment.

NOTE: to clear linked items all at once click the **Clear** button below each list.

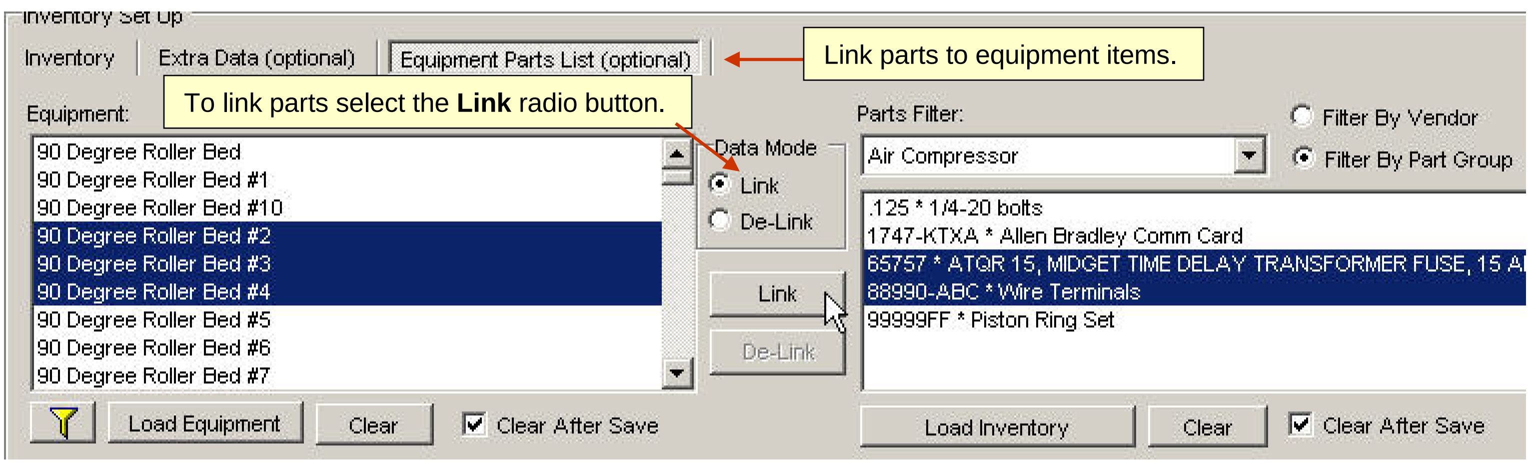
De-linking Parts from Equipment

Follow these steps to de-link a part or multiple parts from an equipment item or multiple equipment items.

1. Click the radio button labeled: De-Link. Click the **Load Equipment** button to populate the equipment list if needed.
2. Select one or more equipment items that you want to de-link parts from.
3. Left mouse click the the parts you want to de-link then click the **DeLink** button.

Reporting and Printing

To crate a parts list report for one or more equipment items select the equipment from the equipment list. Next right click on one of the the selected items in the list and choose **Print Parts List** from the pop-up menu.



Inventory Set Up - Utilities

Copying Inventory to Another Plant: To copy an inventory list to another plant select from the button bar. Select the menu items **Options>>Edit/Add Records to Other Plants**. Once **Edit/Add Records to Other Plants** is checked the menu item **Copy Inventory to Another Plant** becomes available. Select **Copy Inventory to Another Plant.** Now simply select the target plant from the drop-down box and press **Copy**. This function copies all unique part IDs to the target plant. You may edit the target plants' records as needed to reflect their quantities, desired minimum and maximum stock levels, etc. if needed. You may also easily edit the location of inventory parts by either selecting individual parts and manually changing the parts' location or by using the program's **Change Inventory Location** screen.

Changing Inventory Location:

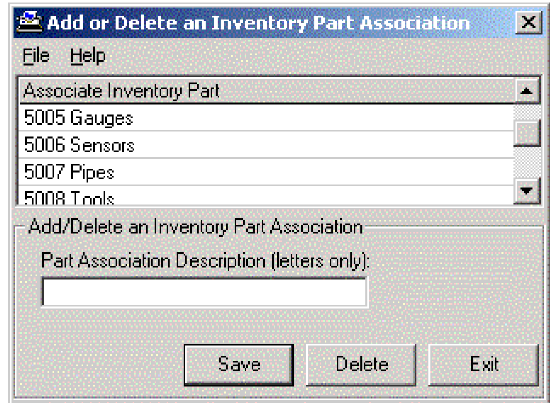
To copy an inventory list to another plant select from the button bar. Select the menu items **Options>>Edit/Add Records to Other Plants**. Once **Edit/Add Records to Other Plants** is checked the menu item **Change Inventory Location** becomes available. Select **Change Inventory Location.** When the screen appears select the plant from the drop-down box. Next either enter the location you want to change in the box labeled **Old Location** or simply select any grid row containing the location you want to change in the main inventory set up screen. Enter the new location in the appropriate text box and press **OK**. All inventory records referenced to the old location for this plant are immediately changed to the new location.

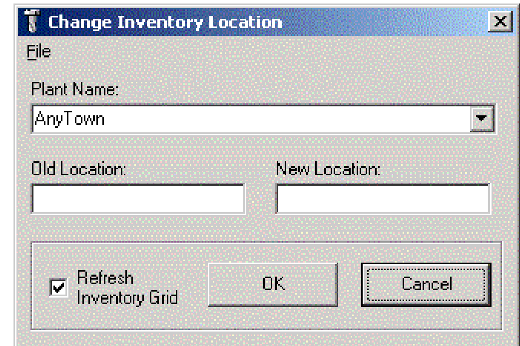
This function is especially useful if you are copying inventory part IDs to other plants. Perhaps some plants use the same parts but store the parts in different locations. In this situation you may copy all of your plant's part IDs to another plant then use the **Change Inventory Location** screen to change the inventory location(s) of many parts at once. Part locations may also be changed by individually editing each inventory record.

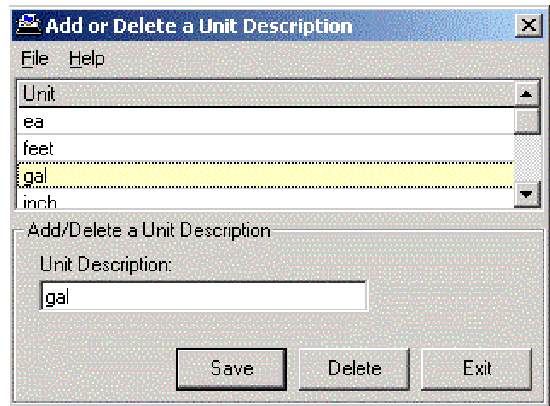
Note: Checking the checkbox labeled **Refresh Inventory Grid** causes the inventory set up grid to show location changes immediately. By leaving this box unchecked changed locations are not reflected in the inventory set up screen until the screen is either reloaded or manually refreshed.

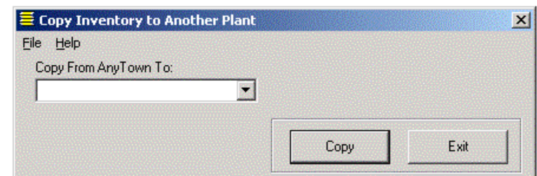
Spare Part Group/Changing Part Groups:

To associate a part with an equipment item or another logical parts grouping select from the button bar. Part Groups are logical groupings of parts for a similar equipment or purpose. For example: Bolts, Electrical Wire, Palletizer could all be part Groups. The purpose of part Groups is to organize and make it easier to locate spare parts. Change multiple part Groups by selecting the menu items Options>>Change Part Group/Group. Change a single Part Group as you would any record edit by left-clicking grid row then changing.









To create a part Group select the menu items **Options>>Add/Delete a Part Group.** Type the logical and descriptive name for the part Group and press **Save.**

Warning: Deleting a part group also permanently deletes ALL records that use any parts included in the deleted part Group including inventory records, purchasing records and part used.

To delete a part Group select the part group from the grid by left mouse-clicking the grid row. Press **Delete**. This permanently deletes the part group all parts included in that part group and all inventory records that used those parts.

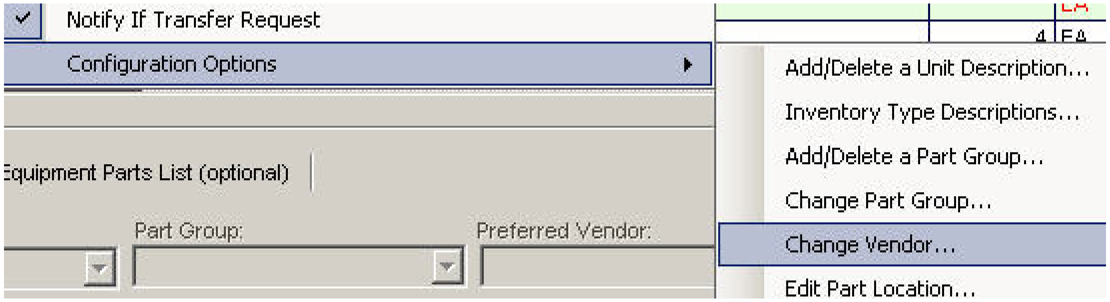
Spare Part Descriptions:

To create a spare part unit description select from the button bar. To create a part description select the menu items **Options>>Add/Delete a Unit Description.** Type the logical and descriptive name for the unit description and press **Save.**

To delete a unit description select the part group from the grid by left mouse-clicking the grid row. Press **Delete**. This permanently deletes the unit description. You may add the unit description later if needed.

Working With Preferred Vendors:

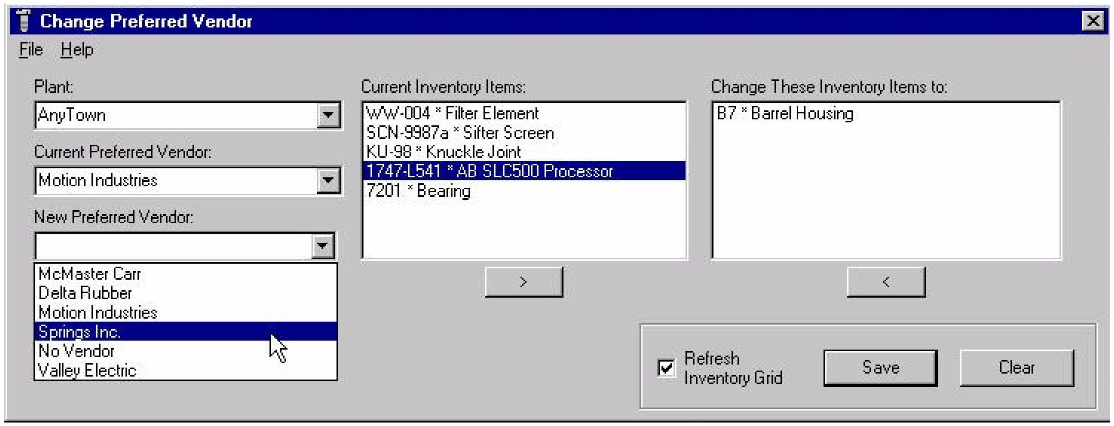
A preferred vendor is simply a vendor that a particular inventory item is usually purchased from. Preferred vendors are used by MaintSmart to create re-order lists when parts stock falls below minimum levels. These reports do not actually have anything to do with any particular purchase transaction but merely display the parts that should be ordered and from which vendor the parts should be ordered.



Preferred vendors are created in the vendor configuration screen but are assigned to particular spare part items in the inventory set-up screen. While adding a spare part item simply select the preferred vendor from the drop-down box labeled **Preferred Vendor**. Create a new vendor from this screen by clicking the button labeled **V** next to the drop-down box.

Changing a Preferred Vendor:

MaintSmart gives you a simple and fast way to change preferred vendors for individual spare parts or many parts all at once. From the inventory set-up screen select the menu items **Options>>Change Vendor…** (note: if this item is grayed-out then check the menu item **Options>>Edit/Add Records to Other Plants** first). After the **Change Preferred Vendor** screen appears select the vendor you want to change from the **Current Preferred Vendor** drop-down. The list box to the right immediately fills with all of the spare parts that reference this preferred vendor. Next select the preferred vendor you want to change to from the drop-down box labeled **New Preferred Vendor**. Select the parts to change vendors for then press the **>>** button to move them into the list box at the far right of the screen. Press **Save**.



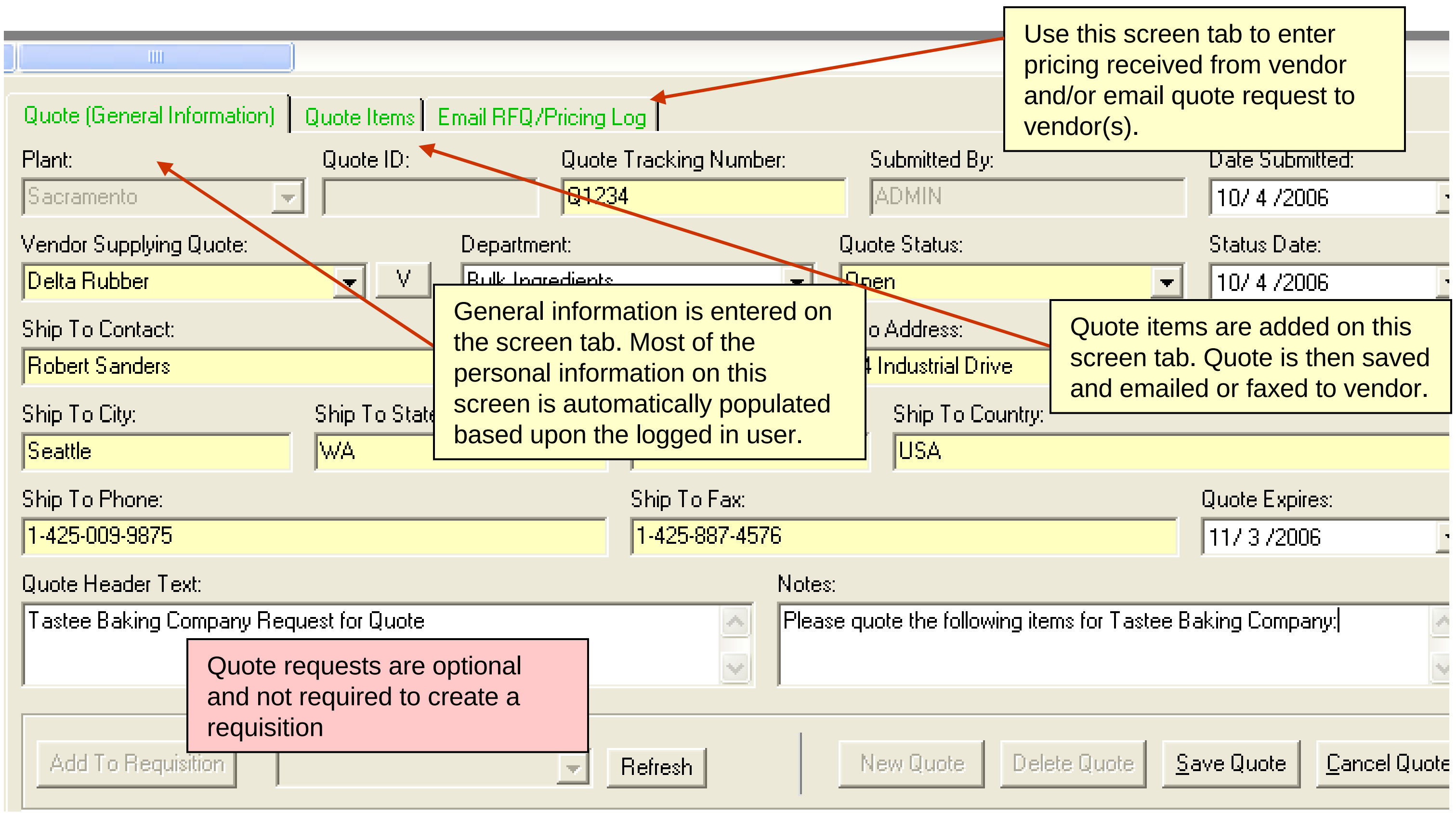
Quote Requests - An Overview

Overview of Quote Requests

To access the Quote Requests screen click on the in the button bar. Quote Requests may be optionally used for the purpose of obtaining the best price from various vendors. Quote Requests are composed of company and personal information from the quote requestor, an quoted item list and quoted prices. Items (parts) listed on a quote may be from the configured inventory list in MaintSmart and/or may be unconfigured part created on the fly. Once a quote has been created it may be printed and/or emailed directly to the quoting vendor. Quote items appear in a text file attachment on the email. This emailing feature works with Microsoft Outlook.

After the quoting vendor responds with prices these prices may be saved to the quote. A quote may also be converted to a requisition from the quote screen. This is particularly useful since the user never needs to leave the quote screen to create either a new requisition or to add the quoted items to an existing requisition.

Quote status is used to designate where the quote is in its lifecycle and is also used to filter the data grid view by quote status.



Quote Requests - Adding New Quotes

Adding a New Quote

To access the **Quote Requests** screen click on the in the button bar.
Creating a quote is a three (3) step process:
A.) Create the empty quote definition containing contact information, dates, etc.
B.) Add the quote items to the quote item list.
C.) Save the list and the quote information into a complete quote.

A.) To add a new quote follow the steps below:
1.) After opening the quote screen click the **New** button. NOTE: Starting with MaintSmart 4.0 users may link personal information to their specific user name (login). By checking the menu item **Options>>Defaults-Quote Requests>>User User Default Info** MaintSmart will populate most of the boxes on the **Quote (General Information)** tab.
2.) After all of the boxes on the **Quote (General Information)** tab have the needed information click on the screen tab labeled **Quote Items**. Here is where you'll link the items (parts) to be quoted. There is no limit to the amount of items that may be added to each quote. You may configure new parts from this screen or add quote items from the existing inventory list.
B.) Add quote items to quote list:
To add a quote item from the existing list of part stock follow these steps:

1.) Optionally select the **Date Item Need** and the **Equipment Item Need For**.
2.) Choose the radio button labeled: **Select Existing Part**.
3.) Choose a filter from the **Filter Parts** drop-down.
4.) Choose an item from the **Existing Items** box. NOTE: you may also use the Quick Part button to configure a new part on-the-fly.
5.) Enter a quantity in the **Quantity** box.
6.) Optionally enter **Payment Terms**, **Freight Terms** and **Ship Via**.
7.) Press the button (at lower left of screen) labeled Add Item this adds the item to the quote items list.

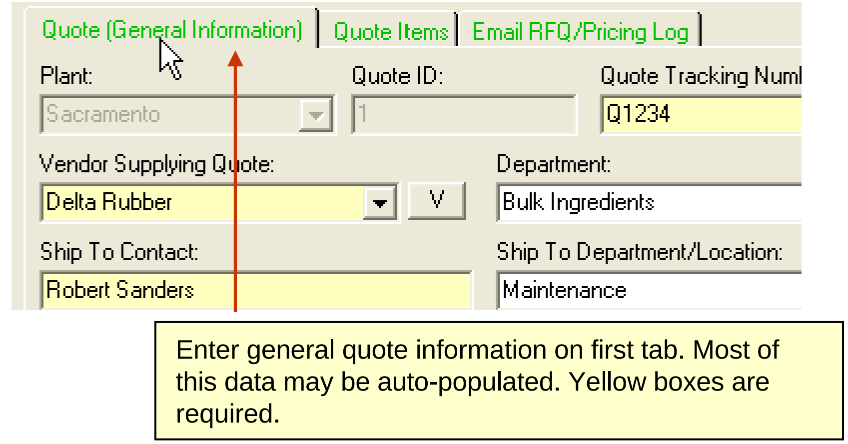
To add an unconfigured item to the quote list follow these steps:

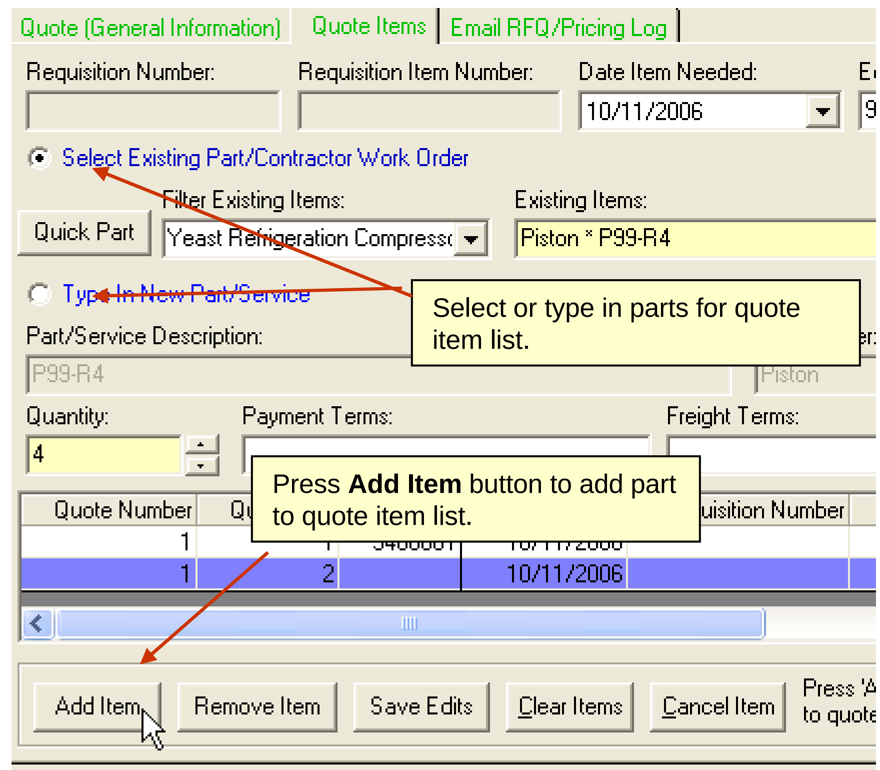
1.) Optionally select the **Date Item Need** and the **Equipment Item Need For**.
2.) Choose the radio button labeled: **Type In New part**.
3.) Type in the **Part Description**, **Part Number** and **Unit**s.
4.) Enter a quantity in the **Quantity** box.
5.) Optionally enter **Payment Terms**, **Freight Terms** and **Ship Via**.
6.) Press the button (at lower left of screen) labeled **Add Item** this adds the item to the quote items list.

C.) Press **Save Quote** button.

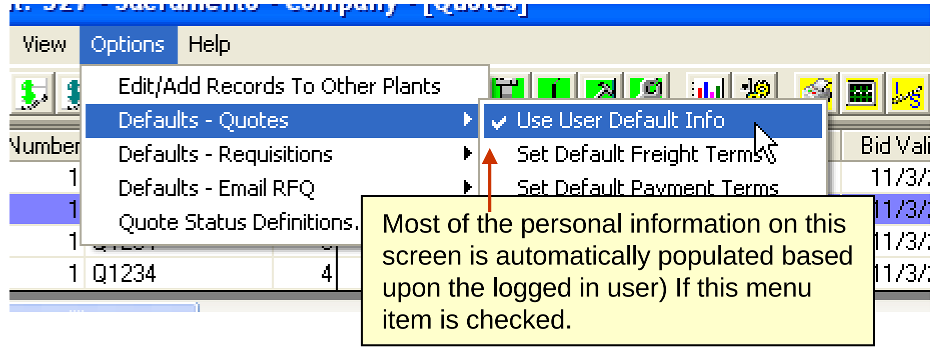
Continue to add quote items to the list by defining them then pressing the Add item button. You may remove an item from the quote list by selecting the item in the small grid at bottom of the screen (quote items) then pressing the **Remove Item** button.

NOTE: Remove items from item list by selecting grid row containing item then press **Remove Item** button. Edit items by selecting, making changes in boxes the pressing **Save Edits**. To clear all quote items press **Clear Items** button.





Quote Requests - Editing General Information Section



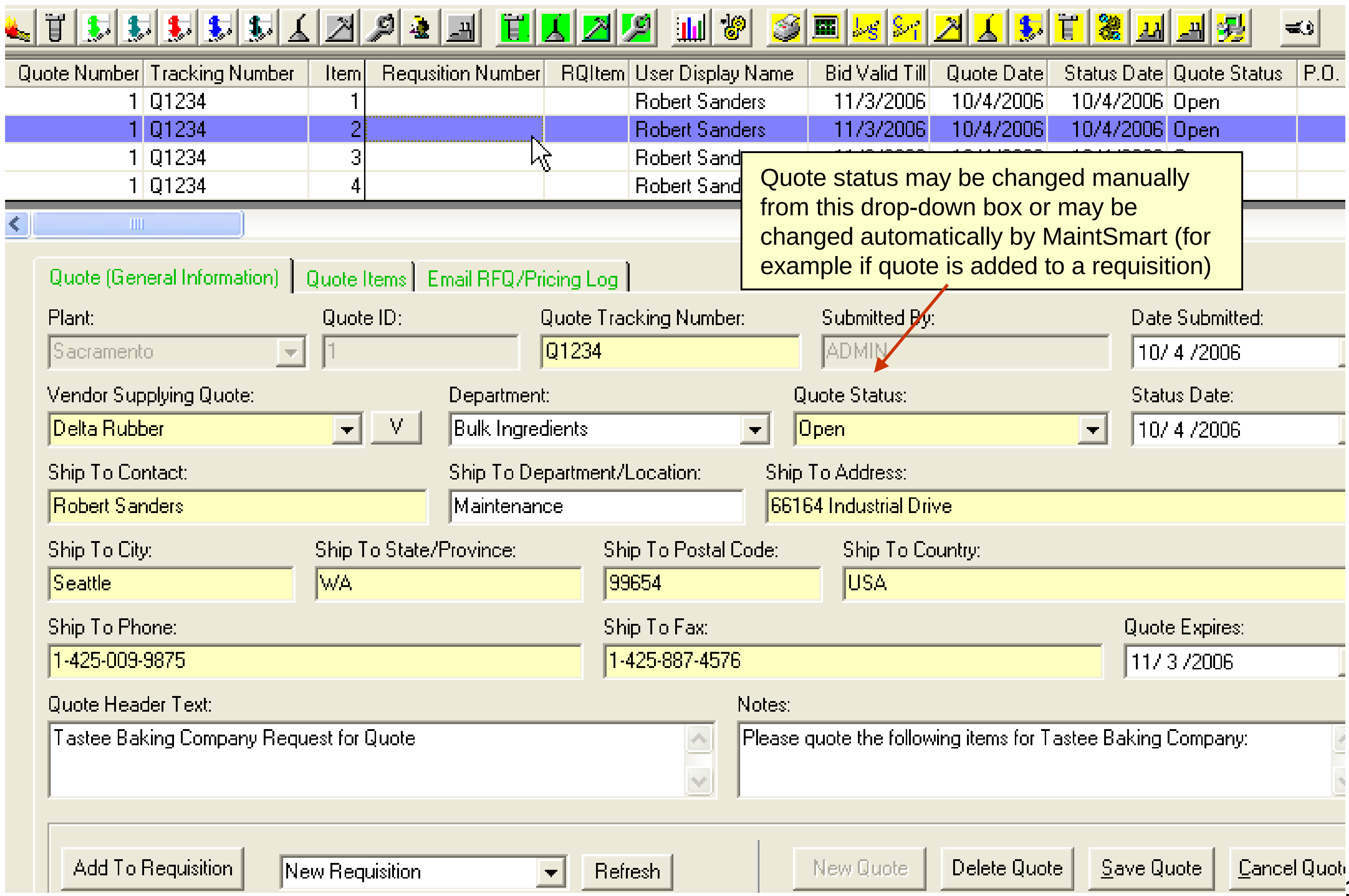
Editing a Quote - Making Changes to The General Information Section

To access the **Quote Requests** screen click on the in the button bar.

Please follow these steps to edit an existing quote:

1.) Left mouse-click the grid row (in the large grid) containing the quote or quote item you want to edit.

2.) <u>If changes are needed in the **general information**</u> section of the quote you should select the small screen tab (below large grid) labeled: **Quote (General Information).** Make changes here then press the **Save Quote** button.



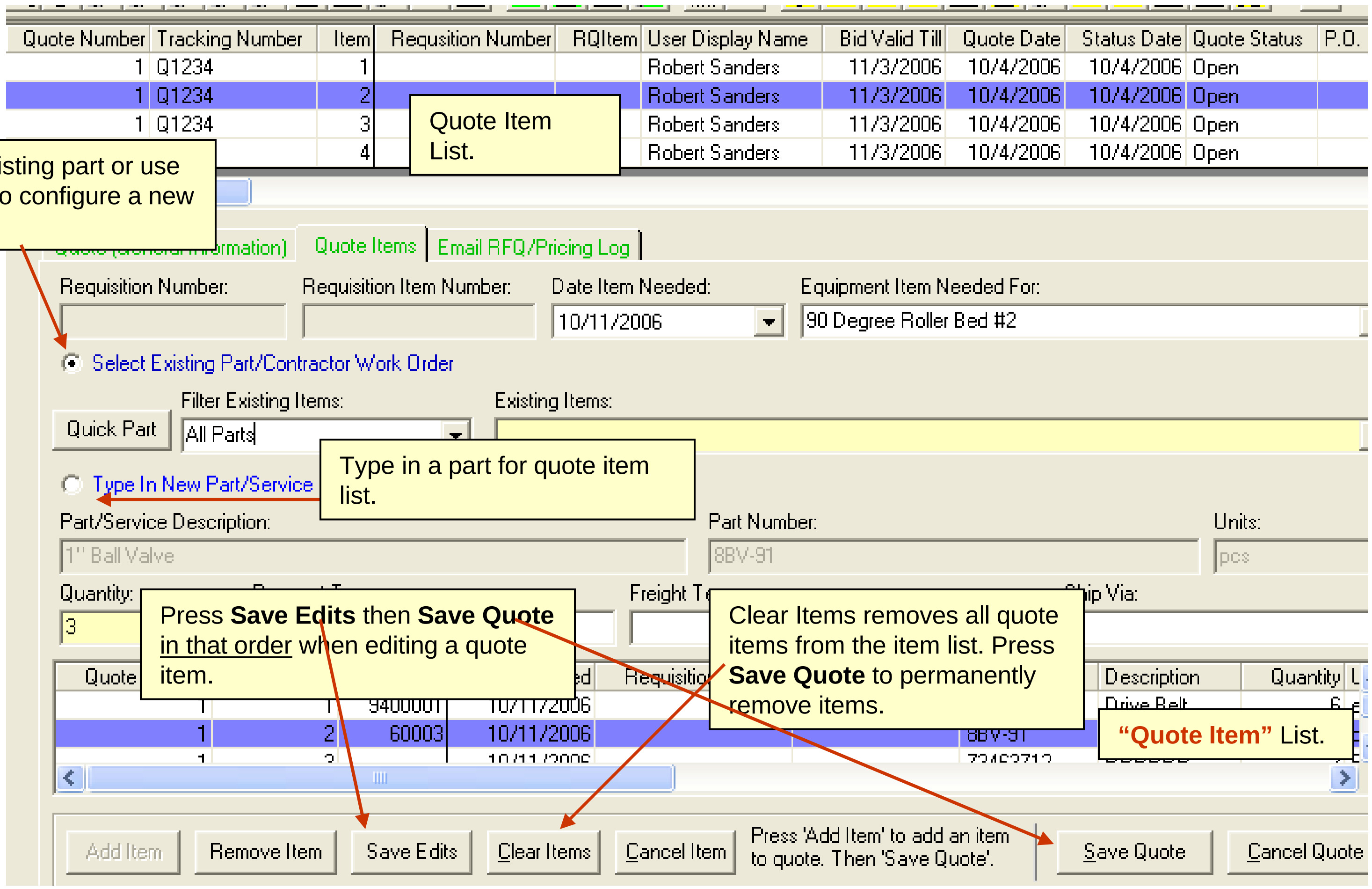
Quote Requests - Editing the Quote Item List

Editing a Quote - Making Changes to the Quote Item List

To access the **Quote Requests** screen click on the in the button bar.

To add another item to an existing quote:

1.) Left mouse-click the grid row (in the large grid) containing the quote or quote item you want to edit. The small item list grid populates with the quote items.
2.) To add another item to an existing quote: pick the **Date Needed**, Choose a Part Filter (or All Parts) then choose an existing part (assumes radio button: **Select Existing Part** is chosen) **OR** select radio button labeled **Type In New Part** and then type in a part **OR** use the **Quick Part** button to quickly configure a new part into your part stock then choose this new part from the **Existing Items** drop-down box. Enter the **Quantity**.
3.) Enter information in optional fields (if needed) Payment Terms, Freight Terms and Ship Via then press **Add Item** button.
4.) Once any additional items have been added to the quote press the Save Quote button.
NOTE: Always press the **Save Quote** button last after all added items, edits or item removals. If you press the **Save Quote** button first your item list edits will be lost.



Quote Requests - Entering Vendor Pricing, Printing and Emailing Quote Requests

Entering Vendor Quote Pricing

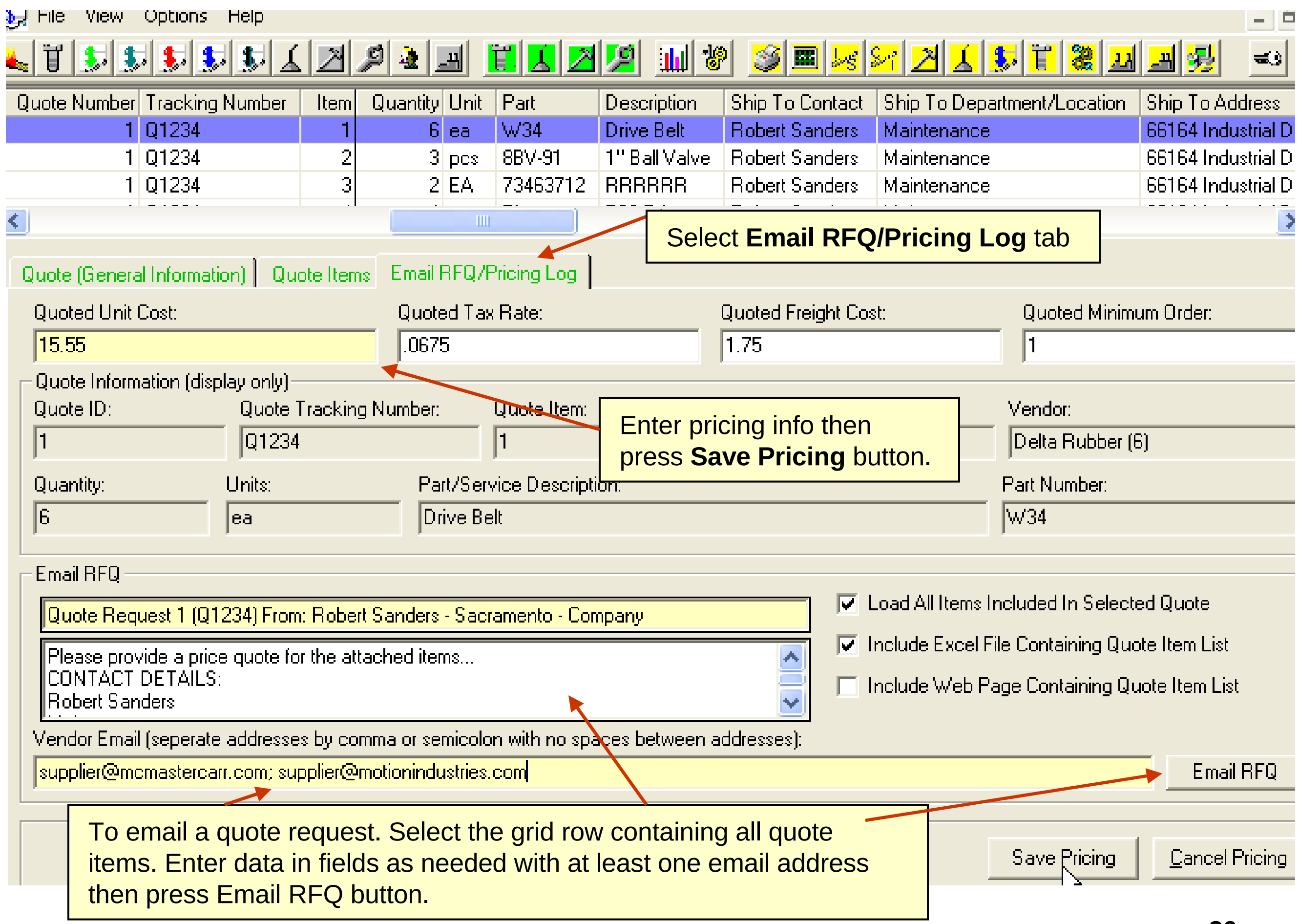
To access the **Quote Requests** screen click on the button in the button bar. After quote requests have been generated these quote requests may be emailed or faxed from MaintSmart. Additionally you may enter the quoted prices into the quote section of MaintSmart then generate requisitions from these quote requests.

Follow these steps to enter pricing received in response to a vendor quote request:
1.) Select the screen tab labeled: **Email RFQ/Pricing Log**.
2.) Left mouse-click the grid row containing the quote item you'd like to enter pricing on. **NOTE**: the quote grid view setting must be set to Item **One Item/Row** to use this feature.
3.) Enter the quoted price and any/all of the optional fields needed.
4.) Press the **Save Pricing** button.

Emailing or Printing Quote Requests

Follow these steps to email Quote Requests to vendors:
1.) Select the screen tab labeled: **Email RFQ/Pricing Log**.
2.) Left mouse-click the grid row containing the quote item you'd like to enter pricing on. **NOTE**: the quote grid view setting must be set to Item **One Item/Row** to use this feature.
3.) Enter an email header (required field) or accept the default provided by MaintSmart.
4.) Optionally enter contact information or accept default provided by MaintSmart.
5.) Check the appropriate checkboxes. Send quote request as either (or both) an Excel file or a web page attachment.
6.) Enter one or more email addresses for the vendor(s) separated by commas or semi-colons.
7.) Press the **Email RFQ** button to send the email with quote request.
NOTE: MaintSmart uses Microsoft Outlook only at this time. In some cases you'll need to make some setting(s) in Outlook that will allow MaintSmart to use the Outlook interface. Your IT department can assist you with this.

Follow these steps to print Quote Requests to vendors:
1.) From any screen tab on the quote requests screen left mouse-click the grid row containing the quote item you'd like to enter pricing on.
2.) **Option 1:** Right-click the selected row then select **Print Quote** from the pop-up menu.
Option 2: Select the **File>>Print>>Request For Quote** menu item. Select the quote you want to print from the resulting drop-down box.



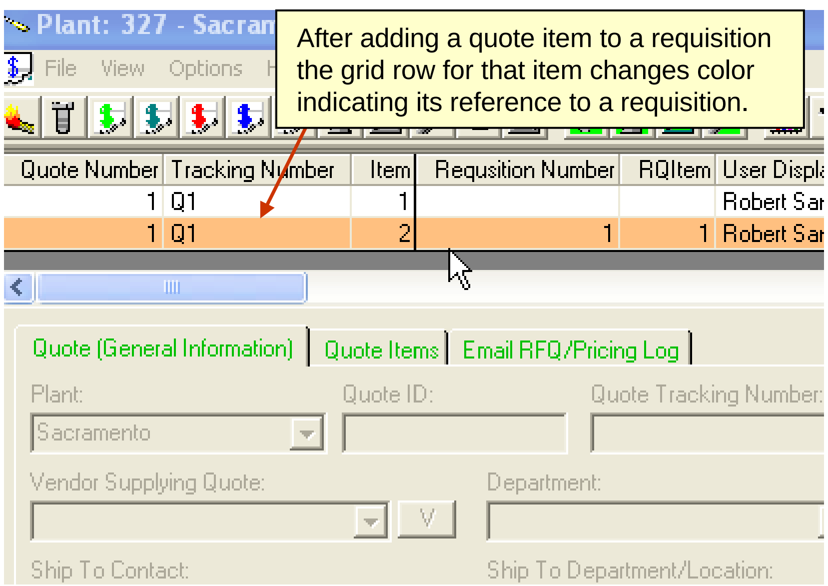
Quote Requests - Options

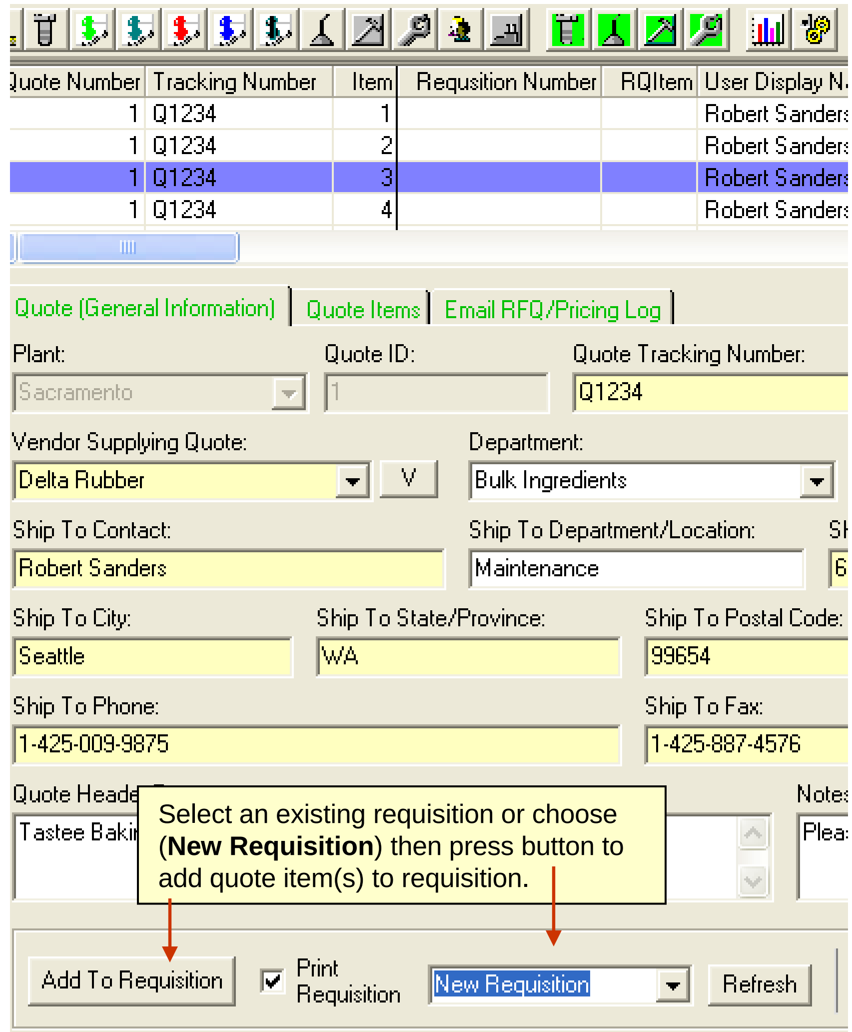
Creating a Purchase Requisition From a Quote

To access the **Quote Requests** screen click on the in the button bar. With MaintSmart you may create a purchase requisition from a quote or create a quote from a purchase requisition. Follow these steps to create a purchase requisition form a quote:

To add one quote line item to a requisition:
1.) Check the **View>>One Item/Row** menu item.
2.) Select the screen tab labeled Quote (General Information).
3.) Left mouse-click the grid row containing the item to select this item.
4.) At the bottom left part of the screen select a requisition number from the drop-down box or choose **New Requisition** to create a new purchase requisition. Press the button labeled: **Add to Requisition**. **NOTE:** Permissions **Add Purchase Requisition** or **Edit Purchase Requisition** are needed to use this feature.

To add one quote line item to a requisition:
1.) Un-check the **View>>One Item/Row** menu item.
2.) Select the screen tab labeled Quote (General Information).
3.) Left mouse-click the grid row containing the quote. This will add <u>all</u> items in this quote to the requisition.
4.) At the bottom left part of the screen select a requisition number from the drop-down box or choose **New Requisition** to create a new purchase requisition. Press the button labeled: **Add to Requisition**. **NOTE:** Permissions **Add Purchase Requisition** or **Edit Purchase Requisition** are needed to use this feature.

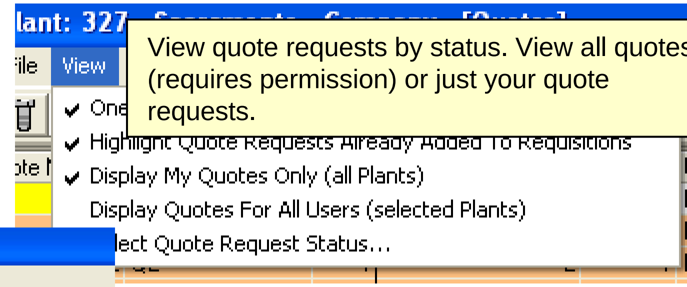




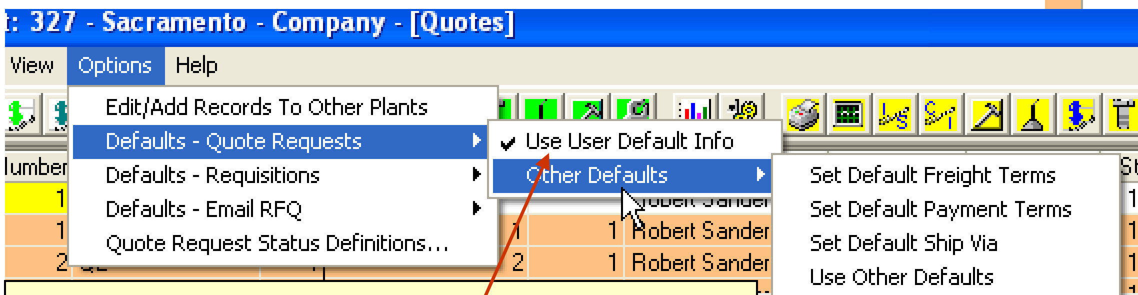
Quote Requests - Options

Creating a Purchase Requisition From a Quote

To access the **Quote Requests** screen click on the [icon] in the button bar. Defaults offer a way for you to have the program handle some of the work for you. Depicted below are a few examples of defaults that may be used by you to provide consistency and speed to the quote request process.

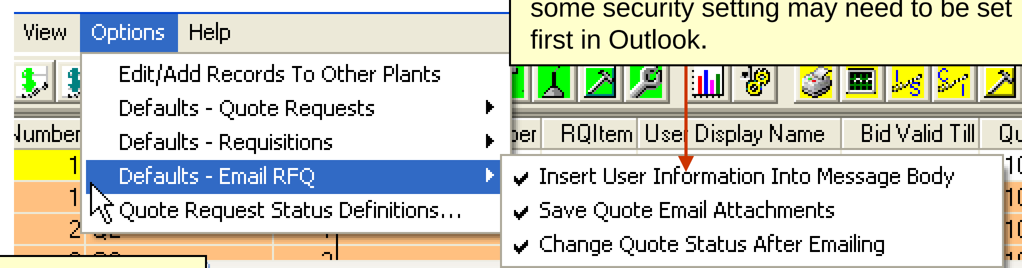


View quote requests by status. View all quotes (requires permission) or just your quote requests.

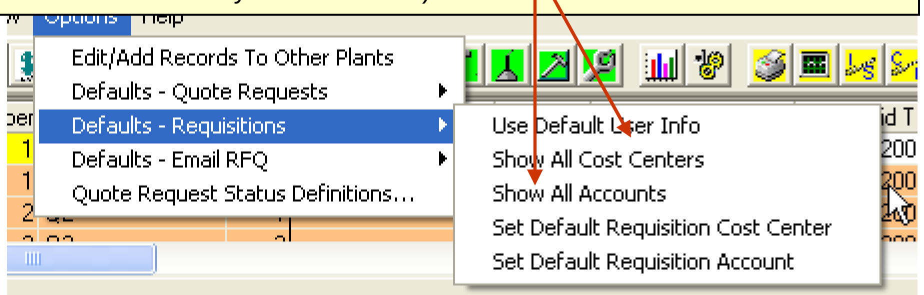


Set defaults for quotes. 'User Defaults' are obtained from the **Passwords** screen in **Program Configuration**. When this default is 'checked' MaintSmart populates much of the quote request information automatically based upon user login.

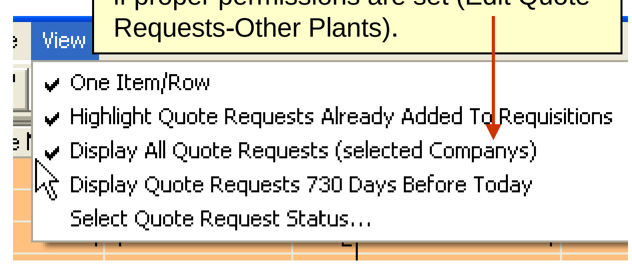
Using email defaults saves time. MaintSmart uses Outlook to email. In order for MaintSmart to use Outlook some security setting may need to be set first in Outlook.



When creating a purchase requisition from a quote MaintSmart will prompt you for a cost center and/or account to use when creating the requisition (if a default has not already been declared).



Display All Quote Requests is available if proper permissions are set (Edit Quote Requests-Other Plants).

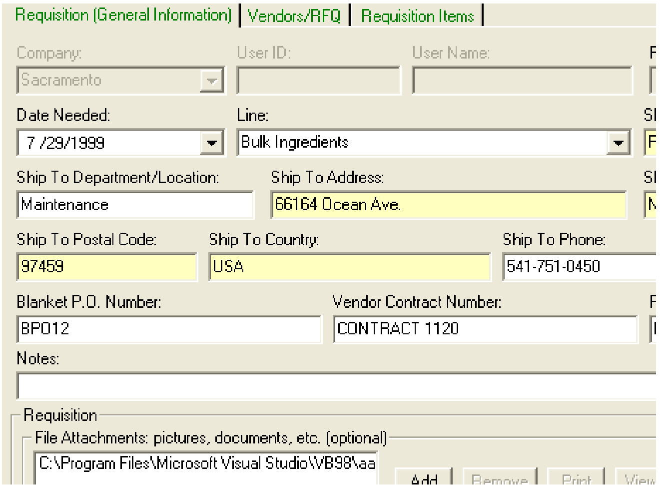


Purchase Requisitions - Adding A New Requisition

Purchase Requisitions - An Overview

To access the **Purchase Requisition** screen click on the in the button bar. An overview of the entire purchasing process may be obtained on page 000. Purchase requisitions are used to request stock items from purchasing. Each item may be approved by the appropriate personnel then release to a P.O. number for the actual purchase. Requisitions may by created from the **Purchase Requisition** screen or from the **Inventory Tree**. Additionally purchase requisitions may be created from the **Hot Sheet** or from the **Quote Request** screen.

The basic process from the purchase requisition screen is create the basic contact information for the requisition, select 1-5 vendors for this requisition then add the requisition items one by one to the requisition. The completed requisition may be printed, faxed or emailed from MaintSmart.



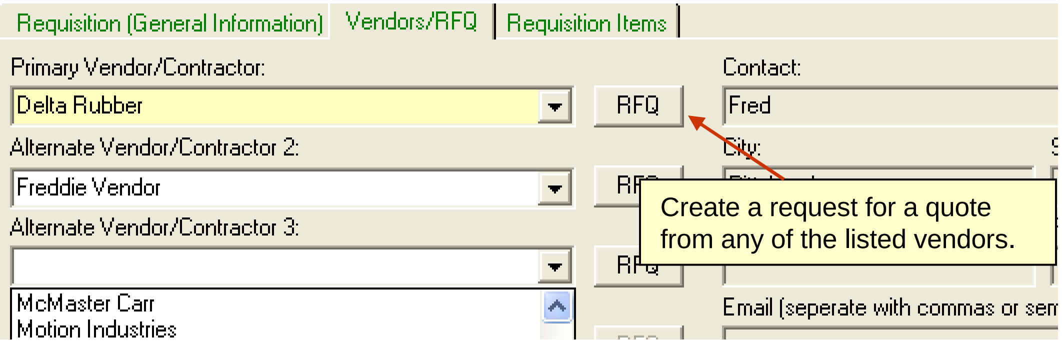
Purchase Requisitions - Adding a New Requisition

Follow these steps to create a new requisition:

1.) Begin by selecting the screen tab labeled **Requestor Contact Information/File Attachments**. Press the button labeled **New** to create a new requisition.
2.) Enter information as needed in the boxes below the data grid (yellow boxes are required).
NOTE: Most of the data on these boxes may be auto-populated by checking the menu item **Options>>Defaults-Requisitions>>Use Default User Information**. These defaults are obtained from the **Passwords** screen in **Program Configuration** and must be set before using this feature. Add one or more file attachments to the requisition.
3.) Click on the screen tab labeled: **Vendors/RFQ**. Select one to five vendors for this requisition.
4.) Click on the screen tab labeled: **Requisition Item List**. Choose the radio button (option button) labeled **Select Existing Part** to choose a stock item for the requisition. (Clicking the **Quick Part** button provides a way to quickly configure a stock item without going to **Inventory Set-Up** screen). Use the **Filter Items** drop-down to limit the selection in the **Items** drop-down. Otherwise choose the option button labeled: **Type in Part** if you'd like to simply type in the item that's needed. **NOTE:** Requisition items that are not stock items(i.e. typed in items) must be configured as stock items at some stage of the requisition approval process in order to be included on a P.O.
5.) Enter a **Quantity** for this item.
6.) Enter a **Unit Cost** for this item. If this item is already a stock item it'll provide a unit cost in the drop-down box. Otherwise you may type into this drop-down box. This is not standard behavior for MaintSmart drop-down boxes as they are almost always select only. In this case it made sense to provide a way to simply type in the cost.
7.) Select a **Cost Center** and an **Account**. These may be later changed.
8.) Optionally enter **Notes**. These notes are linked to the item not the entire requisition as are the **Notes** on the **Requisition** screen tab.
9.) Optionally check **Taxable** and/or **Sole Source**.
10.) Press the **Add Item** button for each item on the requisition.
11.) When all items have been added press the **Save** button to save the entire requisition.

Printing Purchase Requisitions

To print a purchase requisition select the requisition in the data grid with a left mouse-click. Next select the menu items: **File>>Print>>Report>> Requisition**. Alternatively you may right-click after selecting a requisition and use the pop-up menu item: **Print Requisition**.



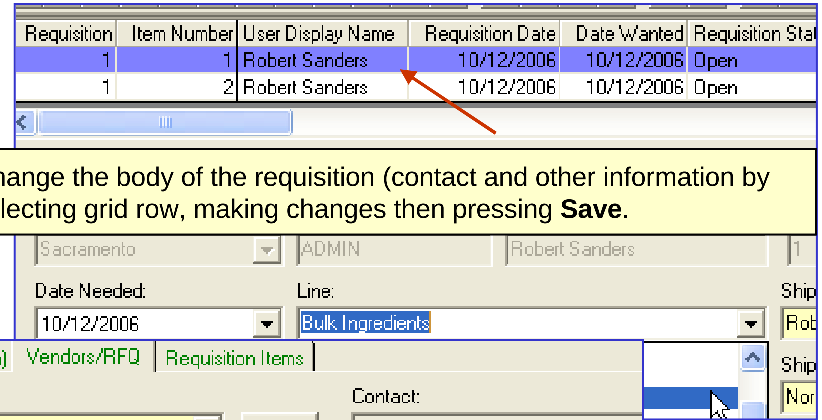
Purchase Requisitions - Editing a Requisition

To access the **Purchase Requisition** screen click on the in the button bar. There may be several reasons for wanting to edit a requisition such as: editing the general contact information, adding/removing vendors, adding/removing items or changing item characteristics. Follow these step to edit a requisition:

1.) To edit a requisition begin by left mouse-clicking the grid row containing the requisition.

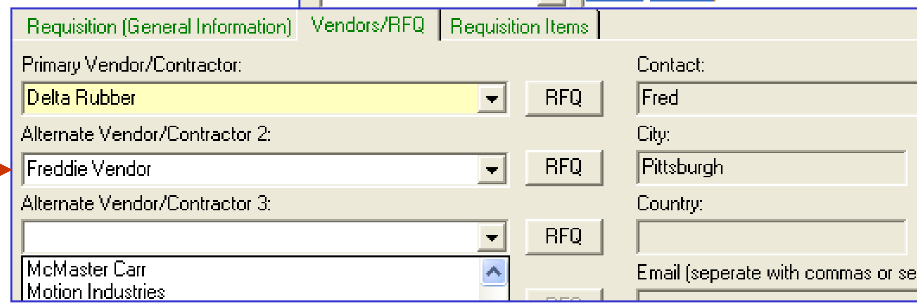
2a.) Make changes to the contact information as needed the press **Save**.

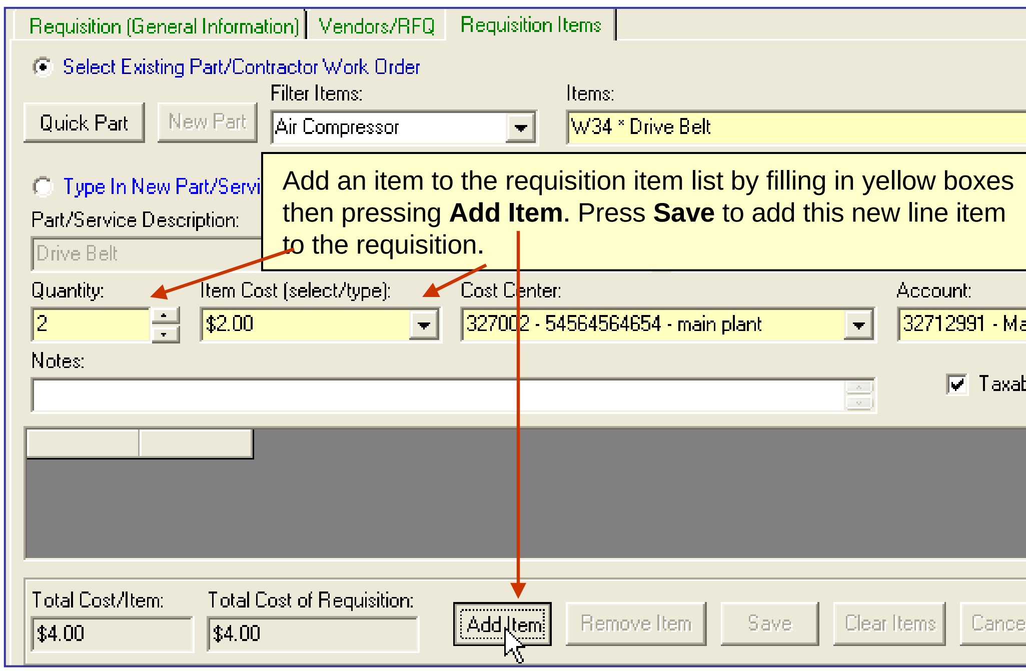
2b.) To add/remove an alternate vendor select the the **Vendors/RFQ** screen tab then choose one or more vendors from the drop-down boxes. Alternatively to remove a vendor select the blank entry from the drop-down box. Press **Save**. (continued below right)



Change the body of the requisition (contact and other information by selecting grid row, making changes then pressing **Save**.

Add primary vendor and up to four alternates.





Add an item to the requisition item list by filling in yellow boxes then pressing **Add Item**. Press **Save** to add this new line item to the requisition.

2c.) To add an item to the item list select the screen tab labeled **Requisition Item List**.

To add a stock item: Select the option button labeled:**Select Existing Part**. Use the **Filter Items** drop-down box to load the Items drop-down. **NOTE**: Keep in mind that selecting **All Parts** from the **Item Filter** causes all stock items to be loaded into the Item drop-down. This may be a slow process. Once you have the part enter the **Quantity**, **Unit Cost**, etc then press **Add Item** to add the item to the item list. Press **Save** to save this new item to the requisition. DO NOT press **Save** until you have added the item to the list with the add item button.

To add a non-stock item: Select the option button labeled:**Type In Part**. Use the **Filter Items** drop-down box to load the Items drop-down. **NOTE**: Keep in mind that selecting **All Parts** from the Item Filter causes all stock items to be loaded into the Item drop-down. This may be a slow process. Once you have the part enter the **Quantity**, **Unit Cost**, etc then press **Add Item** to add the item to the item list. Press **Save** to save this new item to the requisition. DO NOT press **Save** until you have added the item to the list with the add item button.

3.) To edit a requisition item (not the requisition contact or vendor data) left-click the item list grid row that you want to edit. The item list row turns yellow. Select this row or another. Make changes in item list boxes such as **Unit Cost** (may type into this drop-down box), **Quantity, Item Notes, Cost Center, Account,** etc. Press **Save Edits** (MaintSmart also saves the entire requisition in this case when you press **Save Edits**.

4.) To remove an item select the item in the small item list data grid with a left mouse-click the press the **Remove Item** button. Be sure to press **Save** to save the modified item list to the requisition.

5.) Warning: Deleting a requisition permanently removes it from the database but does not delete P.O.s or other purchase transactions linked to this requisition.

To delete entire requisition and all items left-click in requisition grid (large grid) then press **Delete**.

Purchase Requisitions - Options

Purchase Requisitions - Options

To access the **Purchase Requisition** screen click on the in the button bar.

Options

Edit/Add Records For Other Plants provides a way for the user to access or create requisitions from other plants. All Administrators have this right but other user groups must have this right specifically granted.

All Cost Centers setting causes all cost centers from all plants to be available in the Cost Center drop-down. **All Accounts** provides a way to access all accounts for all plants from the Accounts drop-down. This menu item requires special permissions to access.

Defaults can save time and provide consistency. Beginning in MaintSmart 4.0 defaults and other program settings are linked to the user login where appropriate. Checking the **Use Default User Information** menu item causes MaintSmart to draw the default contact and other information linked to the logged in user into the appropriate boxes on the screen tab labeled Requisition (General Information). This saves time and provide consistency to the requisition.

Default Freight Terms and **Requisition Notes** can be used to populate those two fields also. Set the default(s) for the logged in user then check the menu item labeled **Use Defaults** to activate these settings.

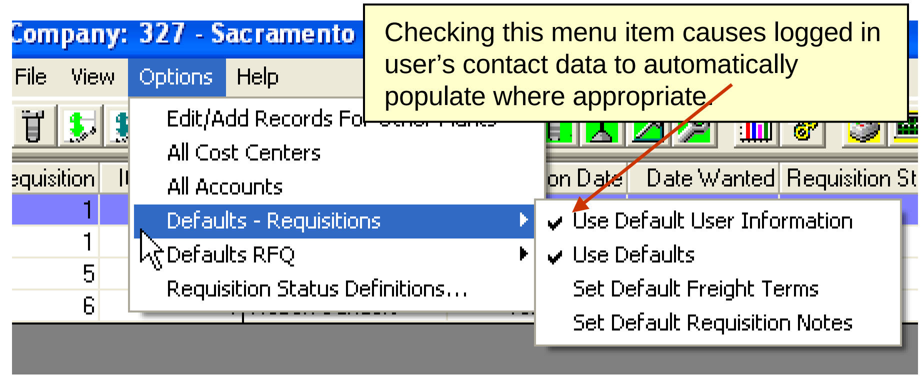
Defaults - RFQ provide a way to set user defaults with respect to quote request (if used). **Print Preview Quote** causes the newly created quote to be displayed in a detail report format. Once the quote request is in this format the request may be faxed, printed or emailed directly from the detail report print preview screen. Additionally MaintSmart may email the request directly from the MaintSmart program using the Outlook email application. The quote request may be attached to the email as a web page and/or an Excel spreadsheet.

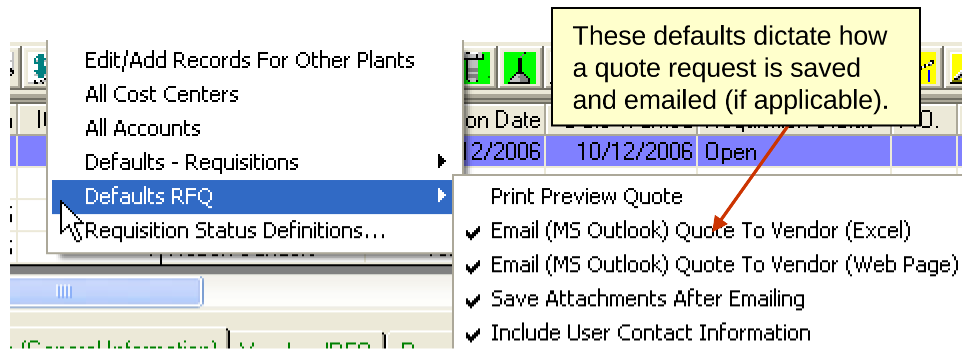
Requisition Status is updated as a requisition moves through the approval and purchasing process. These statuses may be edited with proper permissions but this is not recommended. The MaintSmart program uses the status number to automatically update the requisition status so changing the status text may cause a confusing condition to the end user.

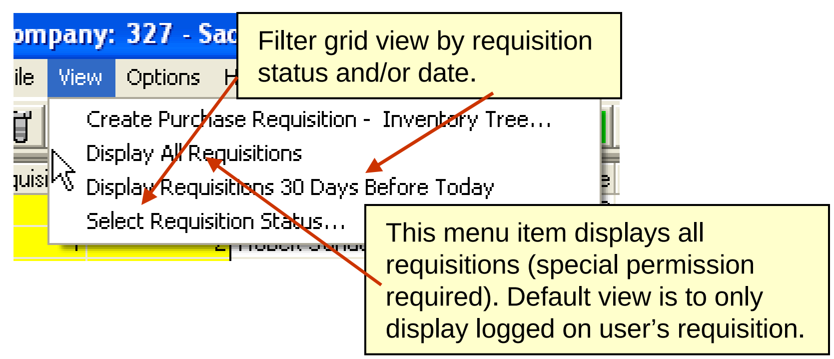
The **View** menu item may be used to open the **Inventory Tree**. The **Inventory Tree** is covered in depth on page 000. Using the **View** menu item you may also change the grid view to only display a certain requisition status and/or a certain date range (before 'Today').

NOTE: the default grid view displays only the requisitions of the logged in user.

File attachments may be added a requisition. Select the requisition in the data grid with a left mouse-click. Next press the Add button near the bottom of the screen tab labeled **Requisition(General Information).** Navigate to the correct file then click the **Open** button on the File Find dialog screen.





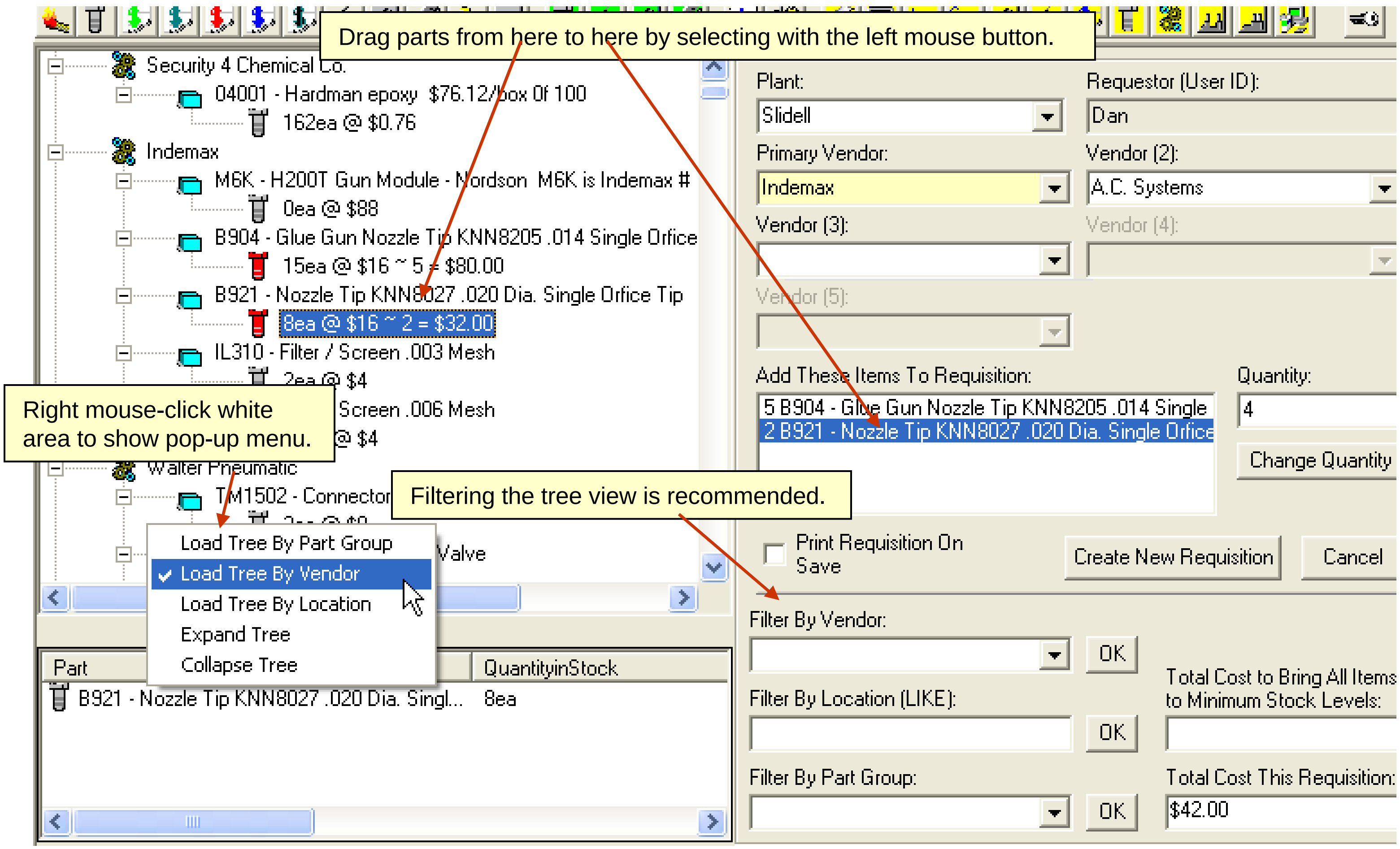


Purchase Requisitions - Inventory Tree

Inventory Tree - An Overview

To access the **Inventory Tree** open any of the following screens by clicking on the in the button bar. The Inventory Tree displays your stock items in a graphically tree format. The tree view may be displayed grouped by **Preferred Vendor**, **Location** (of stock), or by **Part Group**. Load the tree view by either right-clicking the white area of the screen and then choosing one of the grouping options from the pop-up menu or choose the **Load Parts** menu item at the top of the screen. The tree may be expanded by clicking on the needed tree node. All nodes may be expanded by right-clicking and then selecting Expand Tree. NOTE: If you have a large inventory (1000 items or more) expanding all nodes may take several minutes to accomplish especially over a slow network. Once the tree has been expanded the stock items below minimum stock level are displayed as red bolts. The screen may also be filtered by vendor, location or part group. It is recommended that you use filters to speed up the load time of the tree.

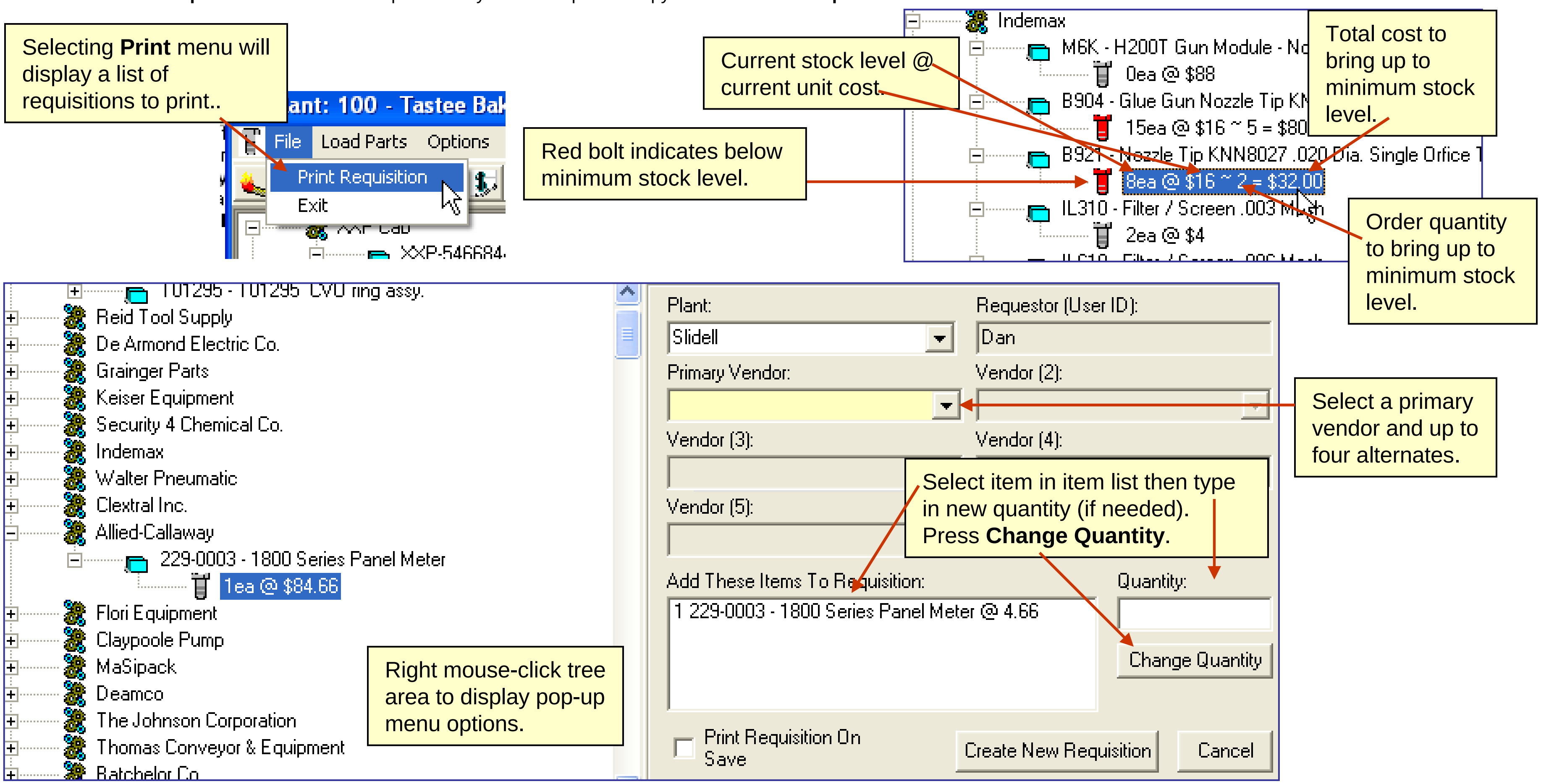
Requisitions may be created from this tree by dragging and dropping the needed items into the item list box (full explanation on page 000). Up to five vendors may be added to the requisition and unlimited parts may also be added. The requisition may also be printed from this screen. NOTE: new requisitions may be created but not edited from the screen.



Purchase Requisitions - New Requisitions From the Inventory Tree

Inventory Tree - Creating a New Requisition

To access the **Inventory Tree** open any of the following screens by clicking on the in the button bar. To create a new requisition follow these steps:
1.) Load the tree with stock items (see page 000) . If you know what item you are looking for it is suggested that you use a filter instead of loading all stock items.
2.) Left mouse-lick on the tree node that contains the part you want to requisition.
3.) When the node expands to list part(s) click on the (bolt) item and hold down the left mouse button.
4.) While holding the left mouse button down drag the item to the list box on the right labeled: **Add These Items To Requisition**. Let go of mouse button to drop the item into the list box.
5.) Continue adding items as needed. To change the default requisition quantity for an item select the item in the item list box. Type in the new quantity in the **Quantity** box then press the **Change Quantity** button,
6.) Select a primary vendor and alternate vendors if needed.
7.) Press **Create New Requisition** to create the requisition. If you'd like a printed copy check the **Print Requisition On Save** check box.

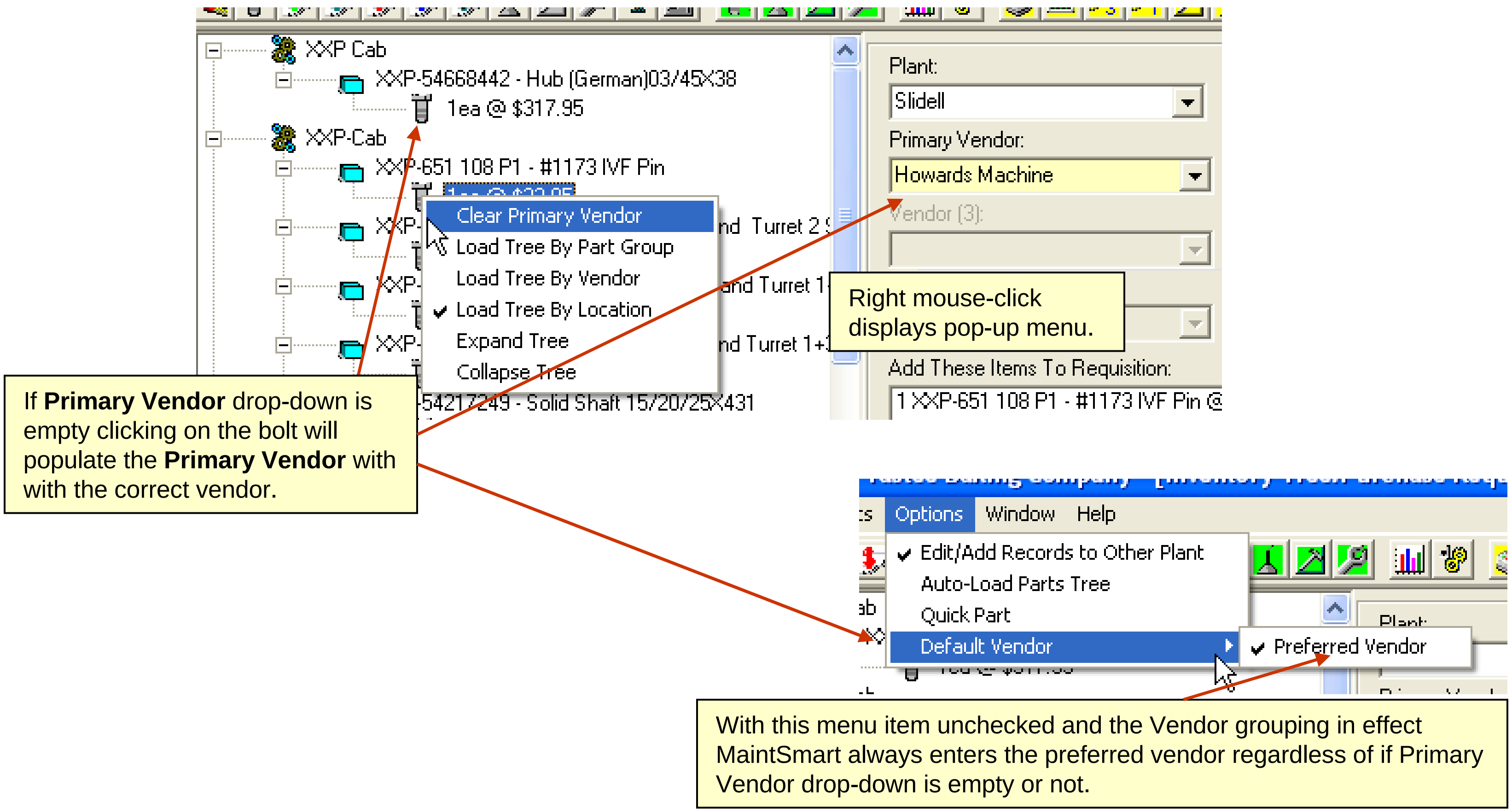


Purchase Requisitions - Inventory Tree Options

Inventory Tree Options

To access the **Inventory Tree** open any of the following screens by clicking on the  in the button bar. Here are a few options available form the Inventory Tree:

Filtering the Inventory Tree.
It is highly recommended that you use filters whenever possible to populate the **Inventory Tree**. This greatly speed up loading of the tree in most cases. There are three filter methods available. To filter by preferred vendor select from **Filter By Vendor** the preferred vendor that is linked to the stock item parts you want to work with. To filter by location enter the full or partial text contained in the location into the **Filter By Location** box. To filter by part group select a part group from the **Filter By Part Group** box. Press the **OK** button to implement the desired filter. To load all data items from any of these filter methods select (for drop-downs) or type (for text box) a blank entry into the filter box and then press **OK**. Since no filter is present MaintSmart assumes you want to load all data.



Purchase Requisition Approval

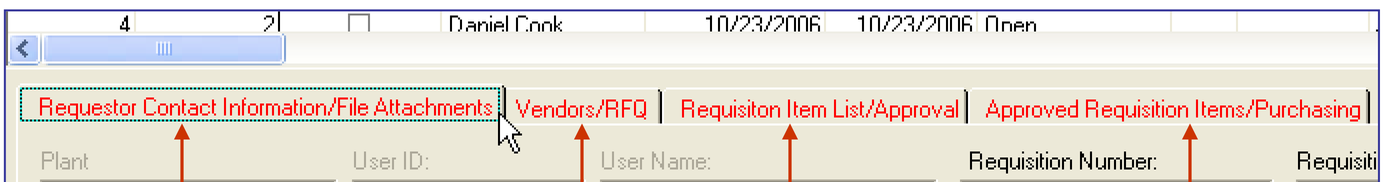
Purchase Requisition Approval - An Overview

To access the **Purchase Requisition Approval** click on the in the button bar. Using the purchase requisition process is optional but enforces purchasing limitations and provides a more tightly controlled purchasing program. See page 000 for details on the entire purchasing process. This screen is used to approve purchase requisition line items. Once these items have been approved the items become available to the purchasing department (or a person with permissions to create P.O.s (purchase transactions). This purchaser then adds these approved items to the P.O. The P.O. may either be an existing P.O. or the purchaser may create a new P.O. from this screen. Although both of these functions are available from this same screen access permissions may prevent a logged in user from accessing one function or the other. Of the four (4) screen tabs on this screen the first three (3) are accessed with approver permissions and the fourth tab is reserved for purchasers (buyers) only.

The **Purchase Requisition Approval** screen displays requisitions previously created through any of the three methods available in MaintSmart. The **Purchase Requisition Approval** screen has three purposes:
1.) Modifying existing purchase requisitions (tabs 1-2). Changing the contact information or adding/removing a vendor is done from this screen.
2.) Editing the requisition item list; such as: changing quantity, default cost center, account, adding freight and tax costs.
3.) Approving (for purchase) line items in the item list. Once items have been approved these items become available to the purchasing. The fourth screen tab on the **Purchase Requisition Approval** screen provide an interface where the purchaser may add approved items either to a new P.O. or an existing P.O.

The first three tabs of this screen are used for changing an existing requisition easily without going back to the actual requisition screen. File attachments may be added, shipping and contact data changed, vendors added or removed, etc.
NOTE: It may be possible to create a purchase requisition without all of the shipping information initially, however this information is required to reach the final step of requisition approval and may be added at this stage.

The fourth tab of this screen is used for purchasing approved items. Each approved line item may be added to an existing P.O. or a new P.O. may be created.



The first three (3) tabs on the **Purchase Requisition Approval** screen are available for editing and line item approval of requisition items. Permission(s) to access this screen and/or these screen tabs is set in **Program Configuration**. *When any of these first three (3) tabs is selected the grid displays requisition data.*

The fourth tab is used for adding previously approved items to a P.O. *When this tab is selected the grid displays approved line items for purchase.*

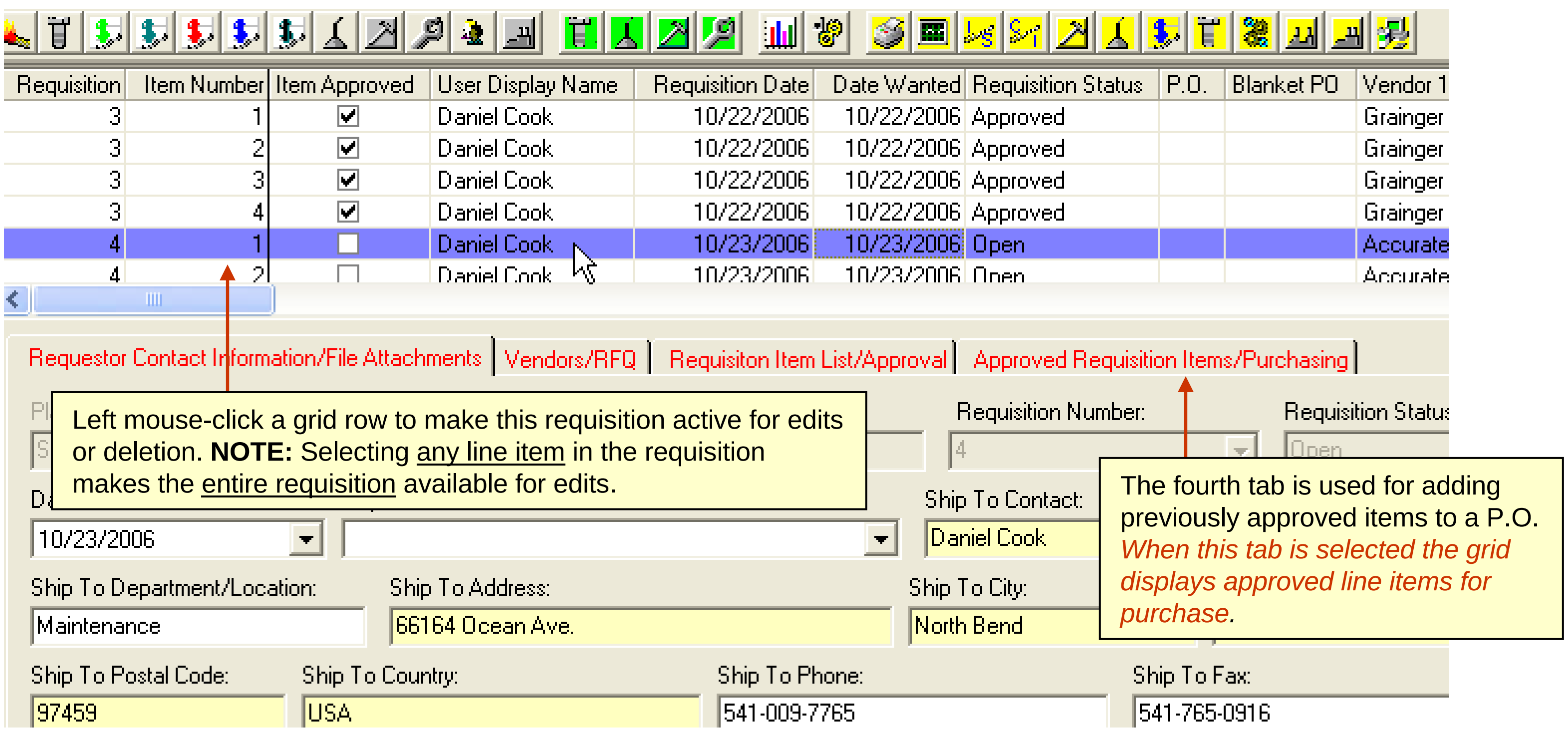
Purchase Requisition Approval

Purchase Requisition Approval - Editing Contact Information and Vendors

To access the **Purchase Requisition Approval** click on the button in the button bar.

Editing Contact Information
Select the screen tab labeled **Requestor Contact Information/File Attachments**. Follow these steps to edit contact information on a purchase requisition:
1.) Left mouse-click the grid row containing one of the items in the requisition you want to edit. (**NOTE:** this part of the requisition (as well as the vendors) is common to the entire requisition.)
2.) Make changes and/or additions to boxes below grid area. Add or remove any file attachments if needed.
3.) Press the **Save** button.

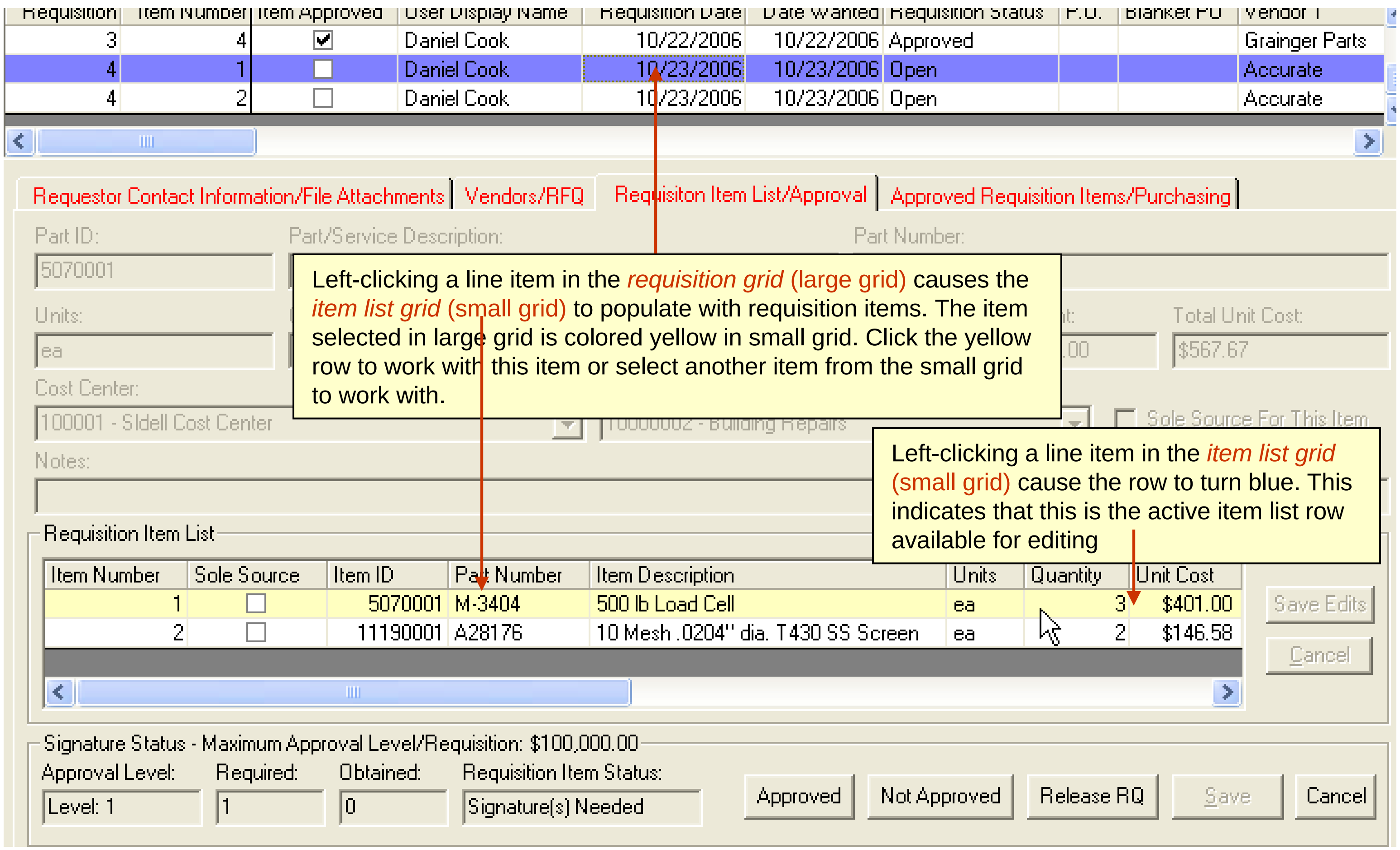
Editing Vendor List
Select the screen tab labeled **Vendors/RFQ**. Follow these steps to edit contact information on a purchase requisition:
1.) Left mouse-click the grid row containing one of the items in the requisition you want to work with. (**NOTE**: the vendor list is common to the entire requisition.)
2.) Add or remove vendors as needed. The primary vendor is the vendor that is listed on the P.O. (if any) by default once this requisition is approved and sent to purchasing. Purchasing can still change the primary vendor prior to adding the requisition item to the P.O.
NOTE: This screen tab also provides a way for you to create a request for quote from the requisition. Further explanation and instruction on this feature are on page 000.



Purchase Requisition Approval

Purchase Requisition Approval - Editing the Requisition Item List

Editing the Requisition Item List
Select the screen tab labeled **Requisition Item List/Approval**. Follow these steps to edit contact information on a purchase requisition:
1.) Left mouse-click the requisition grid row (large grid) containing one of the items in the requisition you want to work with. Notice that the item list is loaded into the item list (small grid) and the selected item row is colored yellow.
2.) Left-click the item in the item list grid (either the yellow row or another if needed) to work with this line item.
3.) Make changes to item in boxes above the item list grid then press **Save Edits** to store changes in item list grid.
4.) Press **Save** button to save the item list changes to the requisition.

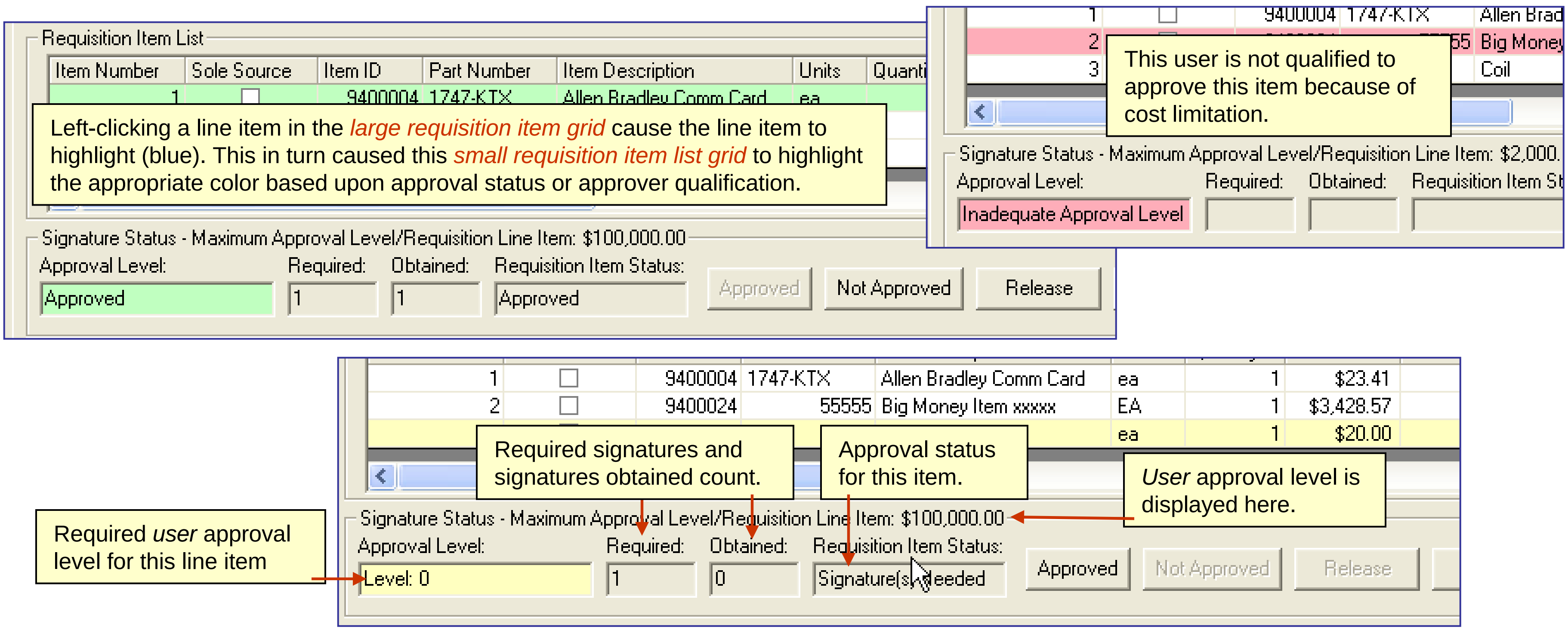


Purchase Requisition Approval - Approving Requisition Items for Purchase

Approving Requisition Items
Select the screen tab labeled **Requisition Item List/Approval**. Follow these steps to approve line items on a purchase requisition:
1.) Left mouse-click the requisition grid row (large grid) containing one of the items in the requisition you want to work with. The grid row highlights when properly selected. (If logged in user has permission to approve a requisition line item of this cost).
2.) Notice the **Approval Level**, **Required** signatures and **Obtained** signatures at lower left part of screen. If logged on user has permission to approve a requisition line item of this cost then the **Approved** button becomes available.
3.) Pressing the **Approved** button causes the logged on user to approve this item for purchase. In the case where only one signature is required and the logged in user has permission to approve a requisition item of this cost then the item(grid row) is checked **Item Approved** in the data grid. However in the case where multiple signatures are required the **Item Approved** checkbox in the data grid does not get checked until the required count of signatures has been added to the line item. As signatures are obtained on each line item the item status is displayed in the lower left part of the screen.

This topic describes how to approve each line item of a requisition. Although items are approved for purchase the entire requisition must be released to purchasing before the items may actually be added to the PO.

NOTE: With proper permission settings this entire approval process may be eliminated and a qualified user may create a P.O. directly as in earlier versions of MaintSmart.



Purchase Requisition Approval

Purchase Requisition Approval - Un-approving Requisition Items for Purchase

Un-approving (Not Approved) Requisition Items

Items that have been previously approved may be un-approved by the user(s) that originally approved the items. Follow these steps to unapprove a previously approved item:

1.) Left mouse-click the requisition grid row (large grid) containing one of the items in the requisition you want to work with. The grid row highlights when properly selected.

2.) Press the **Not Approved** button. A requisition item may only be Not Approved if it has already been Approved by the same user.

NOTE: When a requisition is released to purchasing records with multiple signatures display as multiple rows for one requisition item.

Purchase Requisition Approval - Releasing a Requisition to Purchasing

Release to Purchasing

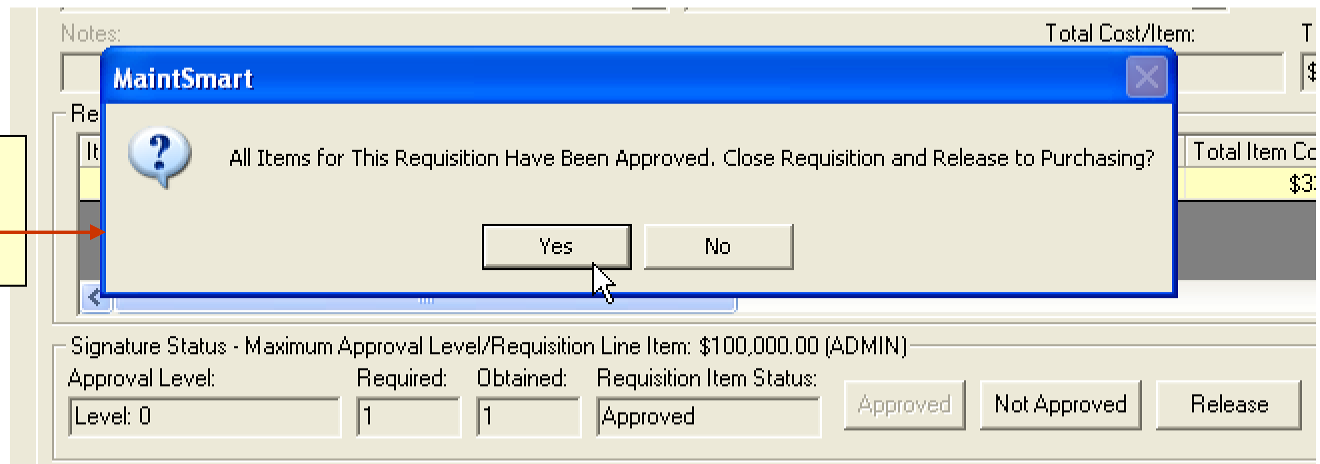
Once one or more requisition items have been approved for purchase the entire requisition may be released to the purchasing department. Once the purchasing department has the approved item list they may add the items to one or more P.O.s. Choose on of the following methods to release an requisition item list to purchasing:

Method 1.) Approve the last item of a requisition and MaintSmart prompts user to release the item list to purchasing. Choose Yes from this prompt

Method 2.) Select a grid row containing one of the *approved* items in the requisition. Press the **Release** button. Follow the prompt to complete this action.

NOTE: Releasing a requisition to purchasing with unapproved items causes those items to be hidden making later approval impossible. This is default behavior and is useful in the case where the approver doesn't want to approve all items.

Once all items on a requisition have been approved then the requisition may be released to purchasing.



Press one of the approved item on a requisition containing unapproved items and the following message is displayed.

Purchase Requisition Approval - Menus and Options

Printing a Requisition

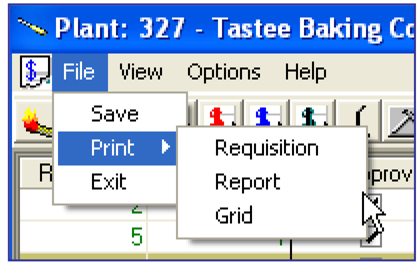
To print a requisition left-click the grid row (large data grid) that contains one of the items for that requisition. Select the **File>>Print>>Requisition** menu item. If a grid row is not selected all requisitions are listed in a drop-down box for you to choose from.

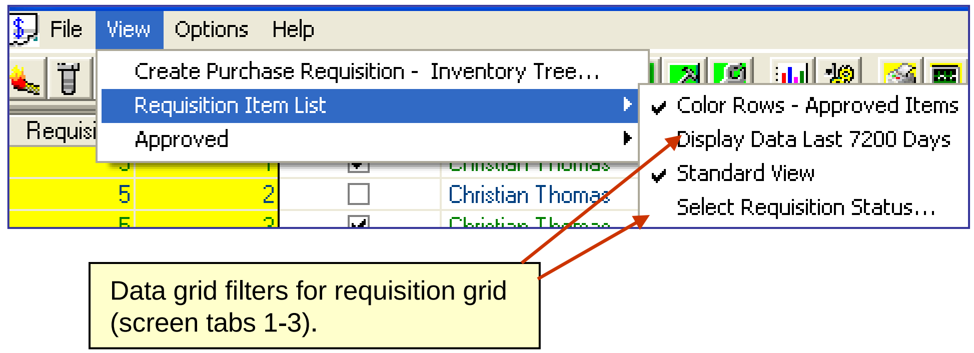
'View>>Requisition Item List' Menu Options

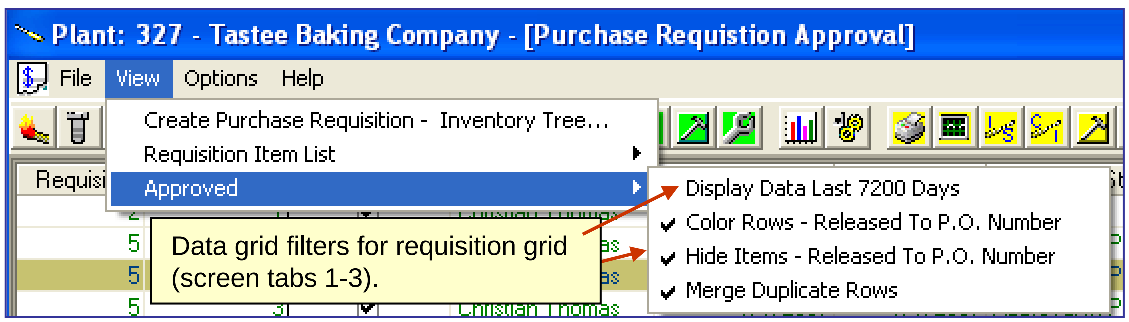
Create Purchase Requisition - Inventory Tree: opens inventory tree screen.
Color Rows: Approved Items: causes approved item(s) text in large data grid to display green.
Display Data Last X Days : Display requisitions created how many days before today up to today.
Standard View: Displays all requisition statuses.
Select Requisition Status: User limits requisition status used to display large grid data.

'View>>Approved' Menu Options

Display Data Last X Days: Display requisitions (released to purchasing status) created how many days before today up to today.
Color Rows - Released to P.O.: Colors text in large data grid (approved requisitions) to orange if status is P.O. Number or higher.
Hide Items - Released to P.O.: Hides data item (row) in grid (approved requisitions) if status is P.O. Number or higher.
Merge Duplicate Rows: Merges Requisition column and Item column if numbers match (affects view only).







Approved Purchase Requisitions and Purchasing

Overview of Approved Requisitions and Purchasing

MaintSmart provides a flexible purchasing interface. Purchasing may be tightly controlled where specific users have permissions allowing only specific functions in the purchasing process. Alternatively permissions may be set allowing one user to create P.O.s directly thereby negating MaintSmart purchasing security features. Below are a few scenarios that may be used for purchasing based upon permissions of the logged in user.

Cost limits may be set on any of the six (6) purchasing approval levels. In addition to cost limits multiple signatures may also be required based upon approval level. All of these setting are configured in the **Program Configuration** screen and may be changed at any time.

More Secure

Purchasing Scenario #1 (uses all security features)
- User #1 creates a new purchase requisition for a high cost stock item.
- Since this is a high cost item multiple signatures must be present for this item to elevate to Approved status.
- User #2 creates a Request for Quotation to obtain the best price for the requisitioned item. This is done from the requisition screen.
- A price is established and entered into the requisition.
- User #2 and User #3 each have adequate permissions to approve this requisition item and do so.
- Requisition is Released to Purchasing department by one of these approvers.
- User #4 has permissions to create a new P.O. and does so. P.O. is emailed to vendor from MaintSmart.
- User #5 has permissions to Receive Stock into inventory. Requested high cost item is received by User #5
- User #1 checks status of original requisition and realizes that item is now available.
- User #1 has permission to Use Inventory and does so thereby completing the acquisition cycle.

Purchasing Scenario #2 (uses most security features)
- User #1 creates a new purchase requisition for a high cost stock item.
- User #2 approves this item for purchase then releases the item to the purchaser.
- User #3 purchases item with a P.O.
- User #4 receives the item into stock.
- User #1 uses the item from stock.

Purchasing Scenario #3 (uses some security features)
- User #1 creates a new purchase requisition for a high cost stock item.
- User #2 approves the item for purchase.
- User #2 purchases the item.
- User #3 receives the item.
- User #1 uses the item from inventory stock.

Purchasing Scenario #4 (does not use any security features)
- User #1 creates a new purchase order for a high cost stock item (no requisition is used).
- User #1 receives the item.
- User #1 uses the item from inventory stock.

Less Secure

Line item approval is used for approving requisition item and for adding items to a P.O. Additionally requisitions and P.O.s may be created semi-automatically from the **Hot Sheet**. Requisitions may also be created using drag and drop from the **Inventory Tree**. Requisitions may also be automatically created from the **Request for Quote** screen.

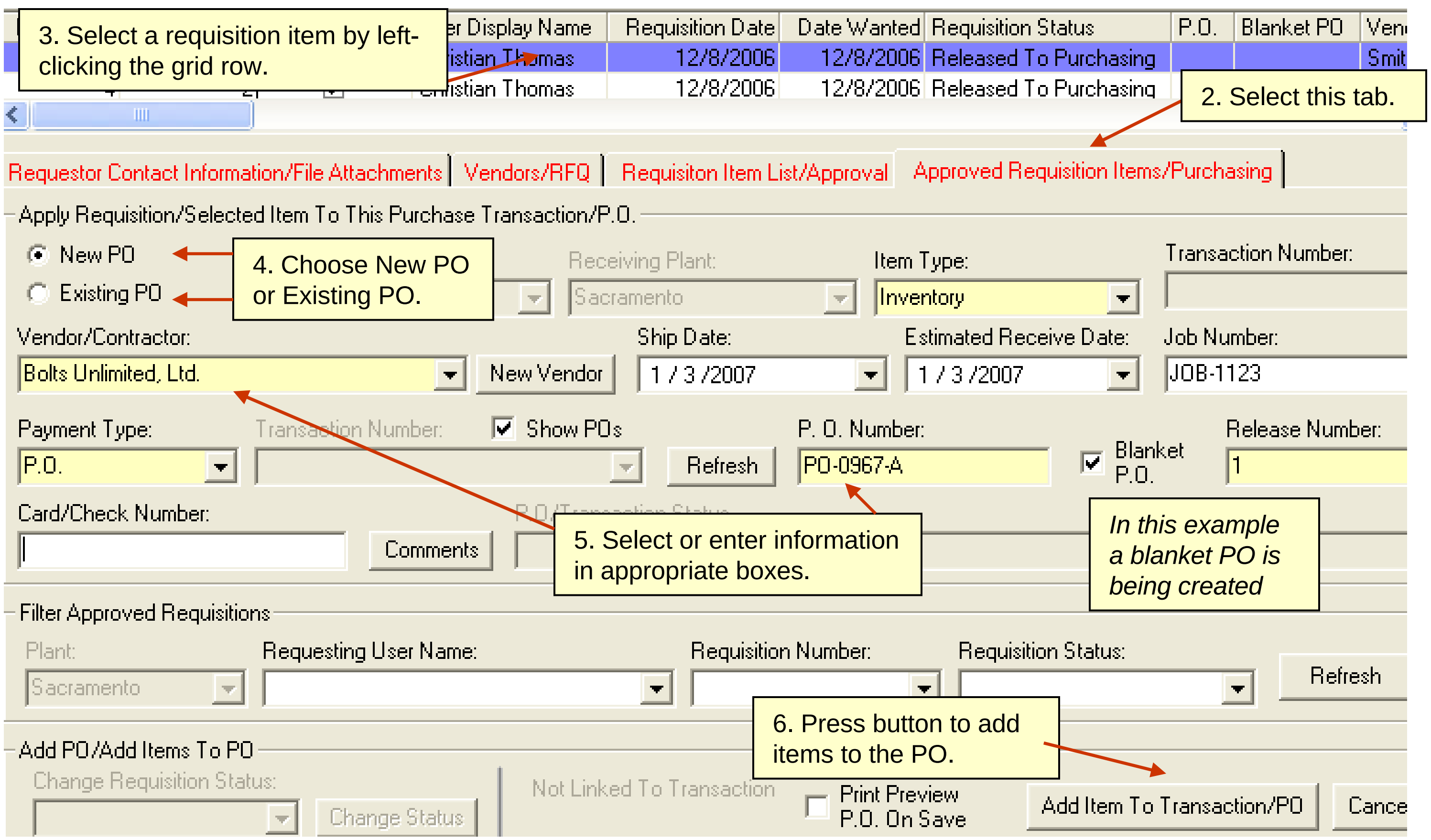
Approved Purchase Requisitions and Purchasing

Creating Purchase Transactions (P.O.)

Follow these steps to add an approved requisition item to a new or existing P.O.:

1.) Open the **Purchase Requisition Approval** screen by clicking the icon.
2.) Select screen tab labeled **Approved requisition Items/Purchasing**.
3.) Left-click a requisition item in the data grid to select it.
4.) Click one of the radio buttons (option button) for either a **New PO** or an **Existing PO**.
5.) In the case of an existing PO simply select the PO form the drop-down box. If creating a new POs select or enter the appropriate data into the boxes.
6.) Press the button labeled **Add Item To PO/Transaction**.

The item is now on the designated PO. Requisition status is updated to PO Number and the line item is removed from the Approval screen.



Approved Purchase Requisition - Menus and Options

More Menu Options

Edit/Add Records For Other Plants (Requisition): checking this menu items make the Plant drop-down available on the first screen tab. This enables the user to edit or approve Requisitions originating from other plants. Requires special permissions.

Edit/Add Records For Other Plants (Approved Requisition): checking this menu items make the Plant drop-down available on the fourth screen tab. This enables the user to obtain PO numbers and add items to POs originating from other plants or items being received by plants other than the user's default plant. Requires special permissions.

All Cost Centers/All Accounts: checking this menu loads all cost centers and accounts into the cost center and account drop-downs. Otherwise only cost centers and accounts from logged in user's default plant are added to these drop-down boxes. Requires special permissions.

Use Default User Information: checking this menu item causes MaintSmart to use the information linked to the logged in user where appropriate.

Release To Purchasing When All Items Are Approved: checking this menu cause the requisition to be released to purchasing automatically when all items have been approved for purchase. Unchecked causes a user prompt to appear when all items on a requisition have been approved.

Defaults - RFQ: Checking sub-menu items sets various defaults for requests for quote if applicable.

Defaults - Approved Requisitions: Checking sub-menu items sets various defaults for approved requisitions and for new P.O.s if applicable. Defaults may be turned on and off by checking or un-checking the **Use Defaults** menu item.

Requisition Status Definitions: provides a way for Administrators to change the text for the various requisition status levels. These definitions are linked internally to a unique number.

Use Global P.O. Numbering: P.O. numbers are unique globally.

Auto-Number New P.O.: MaintSmart uses existing numbering system and auto-increments it.

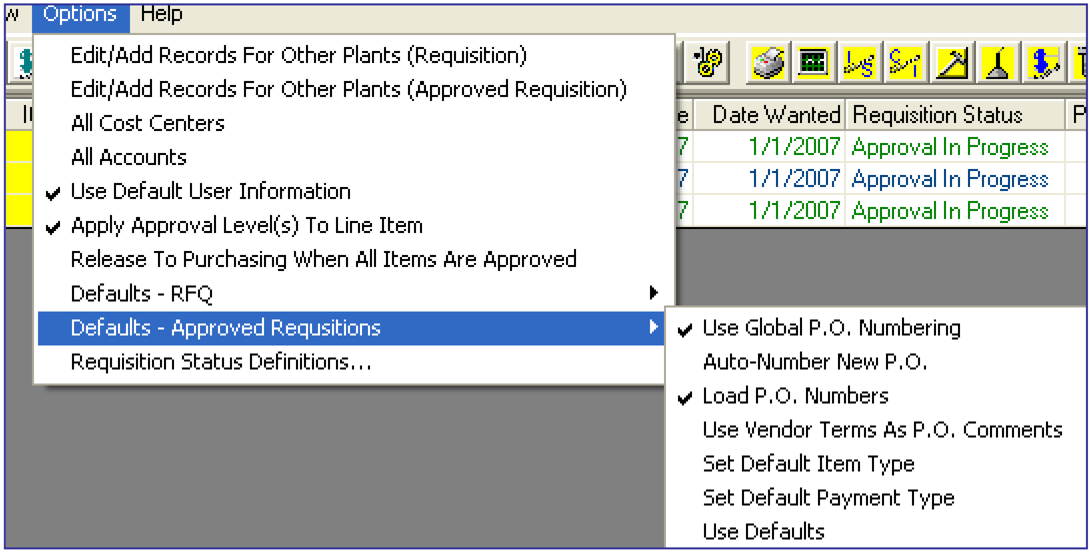
Load P.O. Numbers: Causes P.O. numbers to be displayed in Transaction drop-down box instead of internal transaction number.

Use Vendor Terms as P.O. Comments: MaintSmart uses vendor payment terms as P.O. comments.

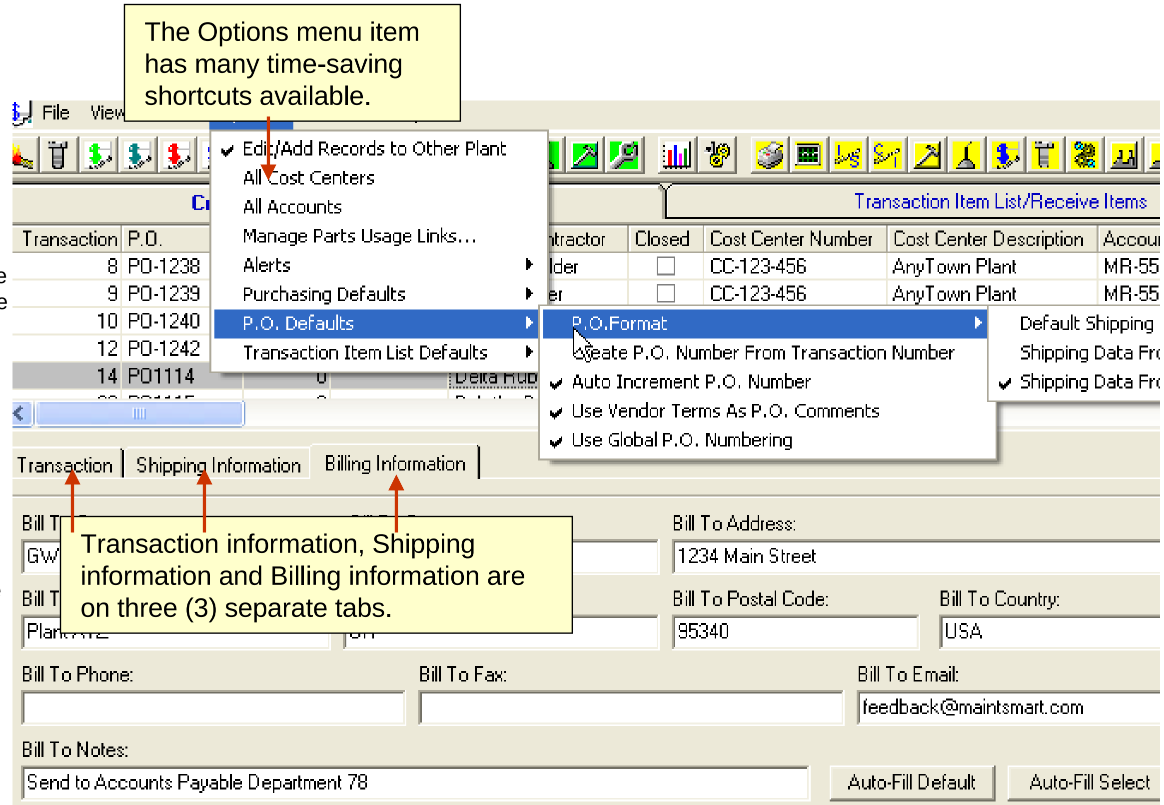
Set Default Item Type: MaintSmart populates Item Type box with this default (turn on Use Defaults)

Set Default Payment Type: MaintSmart populates Payment Type box with this default (turn on Use Defaults)

Use Defaults: Turn defaults on or off if applicable.



Purchasing - Create a Purchase Transaction



Overview of Purchase Transactions :

To work with purchase transactions, transaction lists, and spare parts usage select from the button bar. Purchase transactions identify one purchase from one vendor charged against one account. There can be one or more items being purchased in one single purchase transaction. As purchased items are received they are updated as received into inventory. It is possible to receive part of an order and often times this is the case. As soon as items (parts) are received they may be used. When all of the items in a purchase transaction have been received the transaction may be closed. You may also add more items to a purchase transaction at any time prior to closing it.

Purchase transactions help you to organize your parts acquisition process. MaintSmart© makes it simple to create and maintain accurate purchasing and inventory records. Later when parts are used they can be accurately accessed to the cost of owning the equipment they are used on.

Adding a New Purchase Transaction :

To work with purchase transactions, transaction lists, and spare parts usage select from the button bar.

NOTE: in most cases you would create a purchase transaction (PO) from a requisition. However it is possible to create a PO directly if adequate permissions are give to the user.

Select the tab **Create Purchase Transaction.** Press the **New** button then follow these steps

1. The originating and receiving plants are typically the same. The only case where they would not be the same would be if one plant made a purchase for another plant.
2. Select the cost center, account and the vendor.
3. Select the estimated transaction, ship and receive dates.
4. Select the payment type. If it's a PO enter the PO Number. If the PO is a blanket PO enter the release number (after checking the checkbox labeled **Blanket PO**).
5. Data in other optional fields: Job Reference, Contract Number, etc.
6. Enter shipping data by clicking the small screen tab labeled Shipping Information.
7. From the **Shipping Information** tab either manually type in the shipping information, click the button labeled **Auto-Fill Default** (enters logged in user contact information) or click the button labeled **Auto-Fill Select**. Clicking **Auto-Fill Select** displays a drop-down box with all user names in it. Selecting one of these user names causes that user's contact information to be entered.
8. Press **Save** to keep this new purchase transaction record.
9. You now need to add items (parts) to the purchase transaction.

Adding Detailed Instructions To a Purchase Transaction

Each P.O. may have up to 2 GB of text data linked to it. Follow these steps to add details to a P.O.:

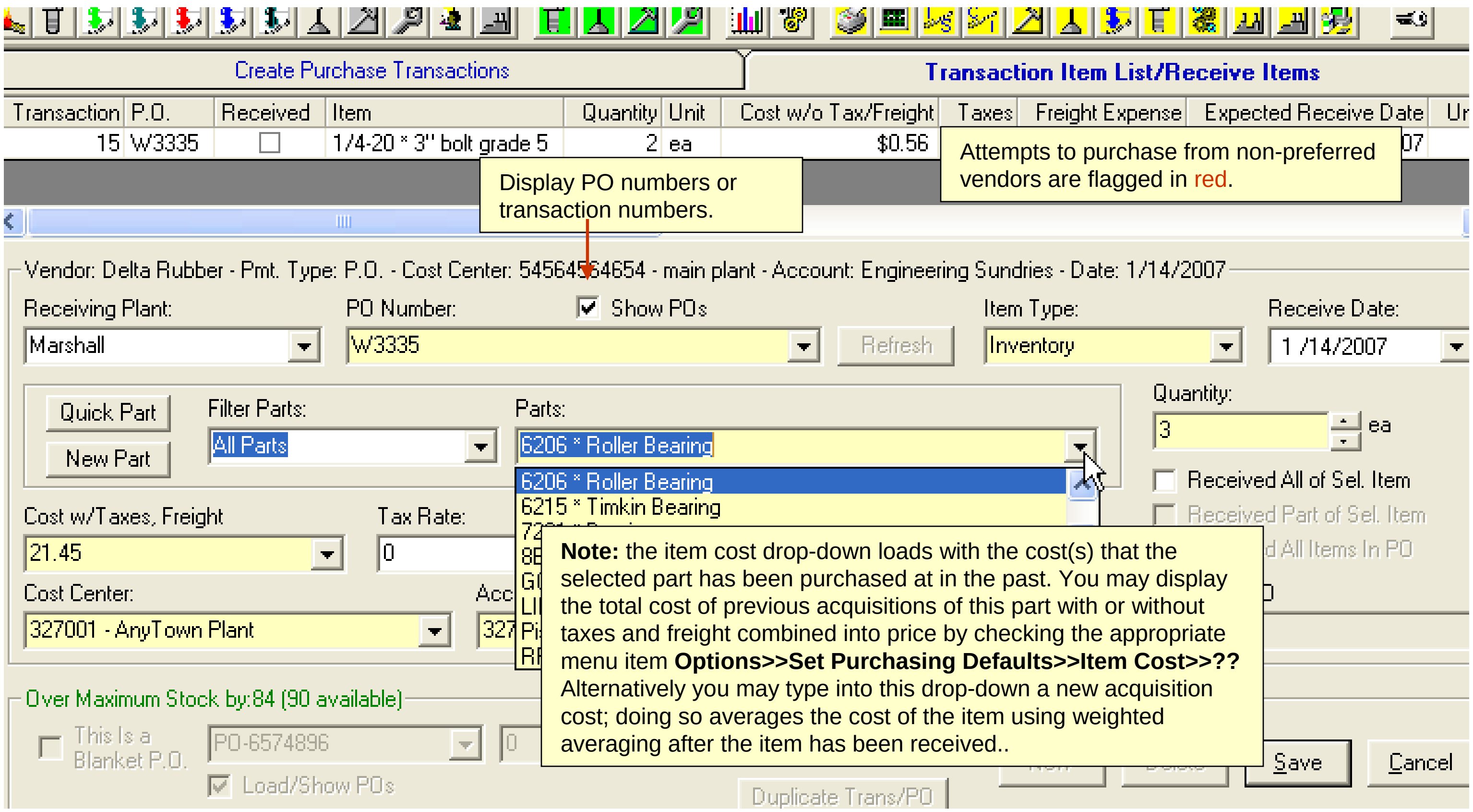
Create a new P.O. by pressing the **New** button on the first tab of the purchasing screen. Fill in the needed data input boxes on this screen. Before saving this record press the **Comments** button. Enter unlimited text into the **Details** screen. Press **OK** on the Details screen then close the details screen and press the **Save** button on the Purchasing screen. You may also left-click an existing P.O. in the grid then press the **Details** button and enter details as an edit to a P.O.

Note: Checking the menu item: **Options>>Set P.O. Defaults>>Use Vendor Comments As P.O. Details** causes MaintSmart to automatically enter the vendor comments (if any) from the linked vendor as P.O. details.

Adding Items to a Purchase Transaction : To work with purchase transactions, transaction lists, and spare parts usage select from the button bar. Select the tab labeled **Transaction Item List/Receive Items**. Follow these steps to add items to a purchase transaction:

1. Press **New** and select the PO/purchase transaction that you want to add items to from the drop-down box.
2. Select the item type and estimated receive date. **Note:** receive date defaults to 'today's date'. Item type is selected once then persists throughout this session unless changed.
3. Use the **Filter Parts** drop-down box to narrow down (or select '**All Parts**') the part being ordered then select the part from the **Parts** drop-down. Select the part and quantity being purchased. If the part doesn't appear in the drop-down box then you may need to add this part ID in the Inventory Set Up section of the program. Press the **New Part** button to create a new part ID.
4. Enter the quantity to purchase, select the item cost (or create a new item cost by typing into the Cost drop-down), tax rate and total freight cost if any.
5. Select an Account and a Cost Center. NOTE: these two fields inherit from the PO created on the previous screen tab but may be changed here in the case where different PO items must be charged to different Cost Centers or Accounts.
5. If all of this item is being received now check the check box labeled **Receive All of Item** otherwise leave all check boxes unchecked.

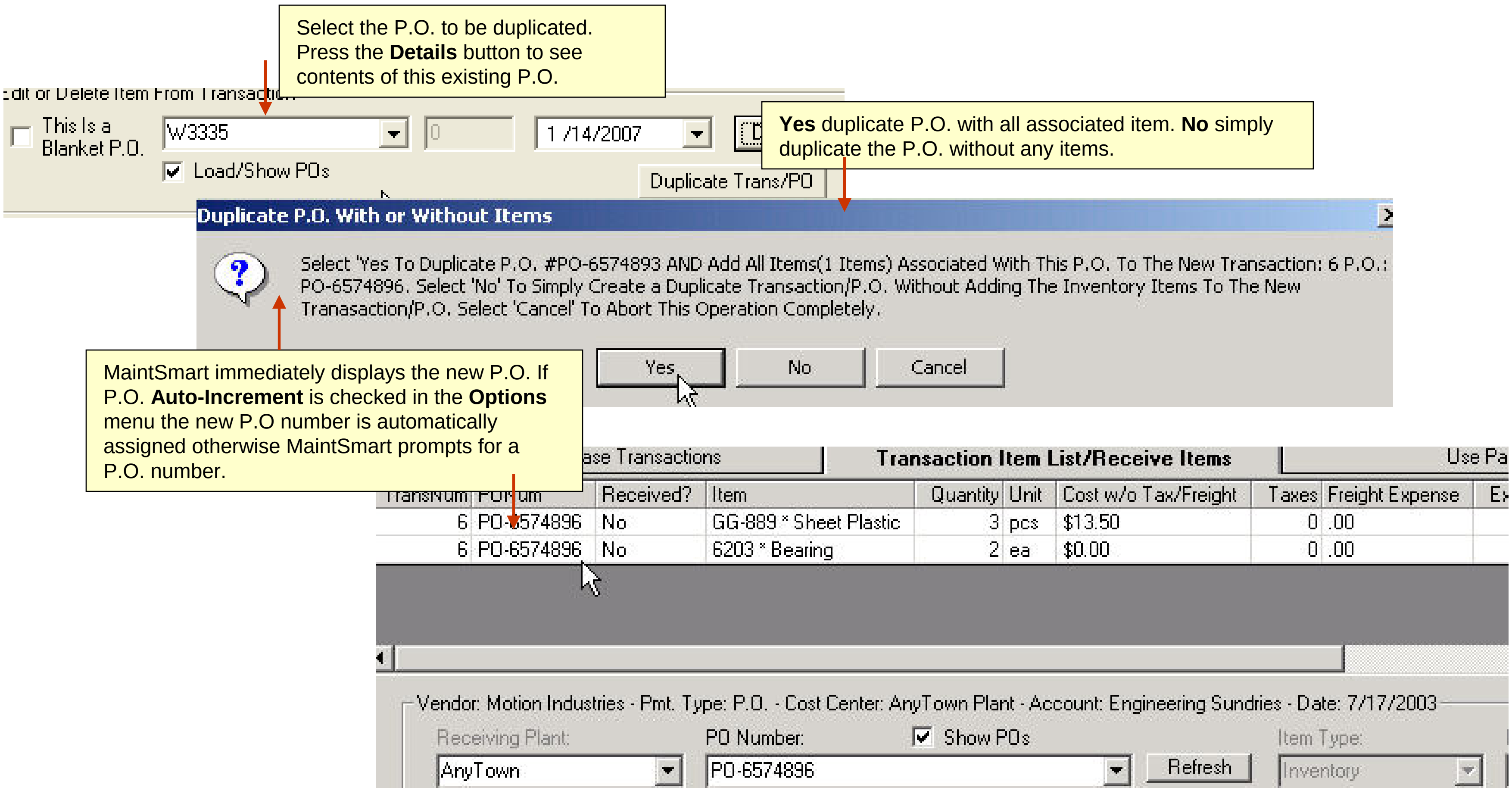
Important Note: You may receive part of an item. To do this finish adding the item that you want to receive part of. Next left mouse-click the grid-row containing the item. Check **Received Part of Item**. After you check this box you need to enter the quantity to be received now. Press **Save** to complete this partial receive of an item. To receive all ordered items in the entire PO at once: **1.** Complete any pending item(row) update. **2.** If the **New** button is disabled press **Cancel** to reset the screen. **3.** Select a PO/transaction from the PO drop-down nearest the grid. **4.** Check the checkbox labeled **Receive All Items In PO/Transaction. 5.** Press **Save**.



Purchasing - Adding Items to a P.O. - Duplicating a P.O. With Parts (2 of 2)

Adding Items to a Purchase Transaction : To work with purchase transactions, transaction lists, and spare parts usage select from the button bar. Select the tab labeled **Transaction Item List/Receive Items**. Follow these steps to duplicate a P.O. with all of the P.O.s items:

1. Check the checkbox labeled Show POs (near the bottom of the screen).
2. Select a P.O (purchase transaction) from the drop-down above the checkbox. This is the P.O you'll duplicate. Note MaintSmart duplicates all items, received or not, and adds them to the selected P.O. as unreceived.
3. To check the contents of the P.O. you are about to duplicate press the **Details** button after selecting the P.O..
4. Press the **Duplicate Trans/PO** button.
5. To duplicate the P.O. and all items in the P.O. select **Yes** when prompted. To simply duplicate the P.O. without any items press the **No** button.

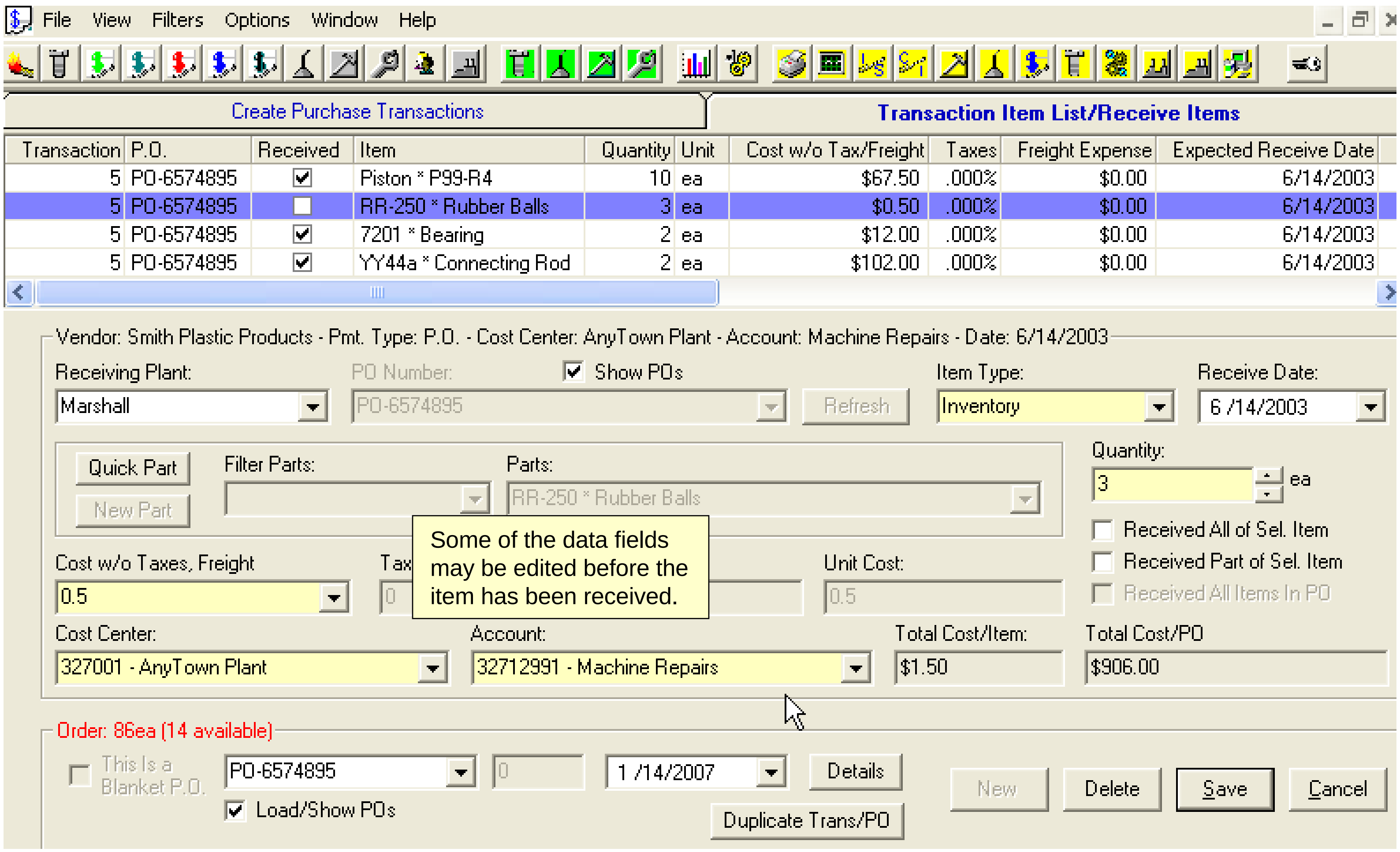


Purchasing - Edit a Purchase Transaction

Editing a Purchase Transaction (PO)

The purchase transaction (PO) may be edited either by changing the general PO data (i.e. vendor, PO number, shipping information, etc. or by adding and/or removing items from the PO item list. To edit the main PO data follow these steps:

1. Click of the screen tab labeled **Create Purchase Transactions**.
2. Click on the grid row that you want to change.
3. Edit the data boxes and/or the shipping information.
4. Click the **Save** button.



Receiving, Editing or Deleting Items in a P.O./Purchase Transaction: **Follow these steps to receive items**:

1. Select the item from the grid by left mouse-clicking on it.
2. Enter the quantity, cost, tax rate and freight.
3. Check **Received All of Item** or **Received Part of Item** whichever is appropriate. If you receive part of the items you need to enter how many of the items you are now receiving in the **Quantity** box.
4. Press **Save**.

Follow these steps to delete items not yet received from an open purchase transaction:
1. Select the item from the grid by left mouse-clicking on it.
2. Press **Delete**.

Follow these steps to edit items not yet received:
1. Select the item from the grid by left mouse-clicking on it.
2. Change the values in the boxes below the grid as needed.
3. Press **Save**.

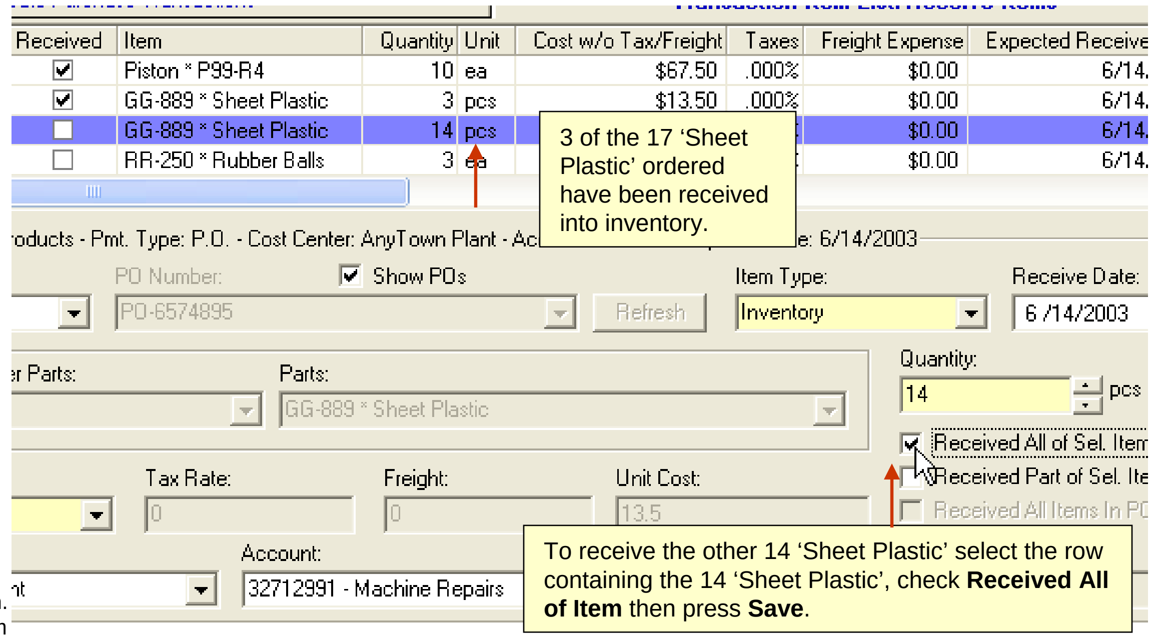
Follow these steps to edit items already received:
Important: Select the item from the grid by left mouse-clicking the grid row containing the record. Before you may edit an item already received you must unreceive it by unchecking the checkbox labeled **Received All of Item**. After pressing **Save** you are prompted to reverse the transaction for this item only. After selecting **Yes** from the prompting message box the part is automatically removed from inventory and the item is unreceived. At this point you may reselect the grid row containing this transaction item and edit the item by changing values in the textboxes below the grid.

1. Select the item from the grid by left mouse-clicking on it.
2. Change the values in the boxes below the grid as needed.
3. Press **Save**.

Receive Part of a P.O. Item:

There are instances where part of an order is received and the parts need to be logged into inventory. (Parts must be in inventory before they may be used, for example.)This common situation is easily handled by MaintSmart©. To receive part of a transaction item follow these steps from the **Purchasing and Spare Parts Usage** screen (**Transaction Item List/Receive Items** tab):

1. Select the unreceived item from the grid by left-mouse-clicking the row containing the record.
2. Check the box labeled **Receive Part of Item.**
3. Enter the partial quantity that you want to receive now in the box labeled **Quantity**.



4. Press **Save**.

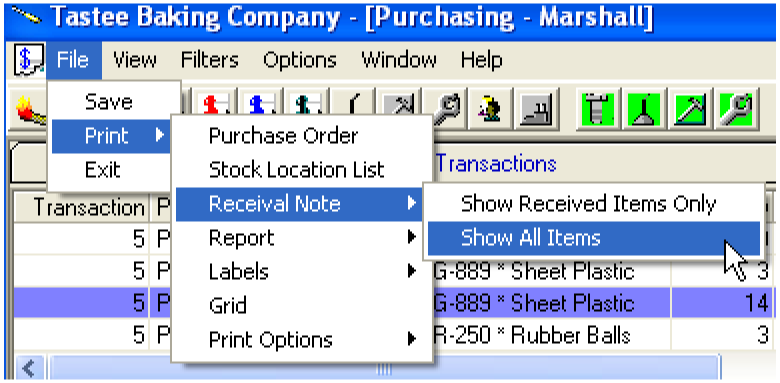
To create a new part from the purchasing screen press the **New Part** button. When the **Inventory Set Up** screen appears press **New** and create the part. When you have finished creating the new part select the menu item **Return to Purchasing.**

Receive All Items In P.O. At One Time:

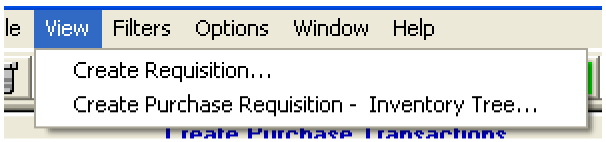
To receive all items (at one time) on a P.O. follow these steps:
1. Press the **Cancel** button if it is enabled (not grayed out).
2. Select the P.O. you want to receive from the drop-down just below the grid labeled **P.O. Number** or **Transaction Number**. The checkbox labeled **Receive All Items In PO** becomes available.
3. Check this checkbox labeled **Receive All Items In PO**.
4. Press **Save**.

Receive all items in a P.O. at one time.

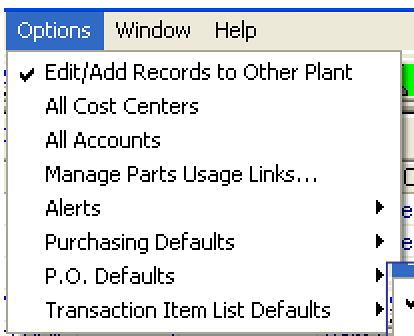
Purchasing - Menus and Options



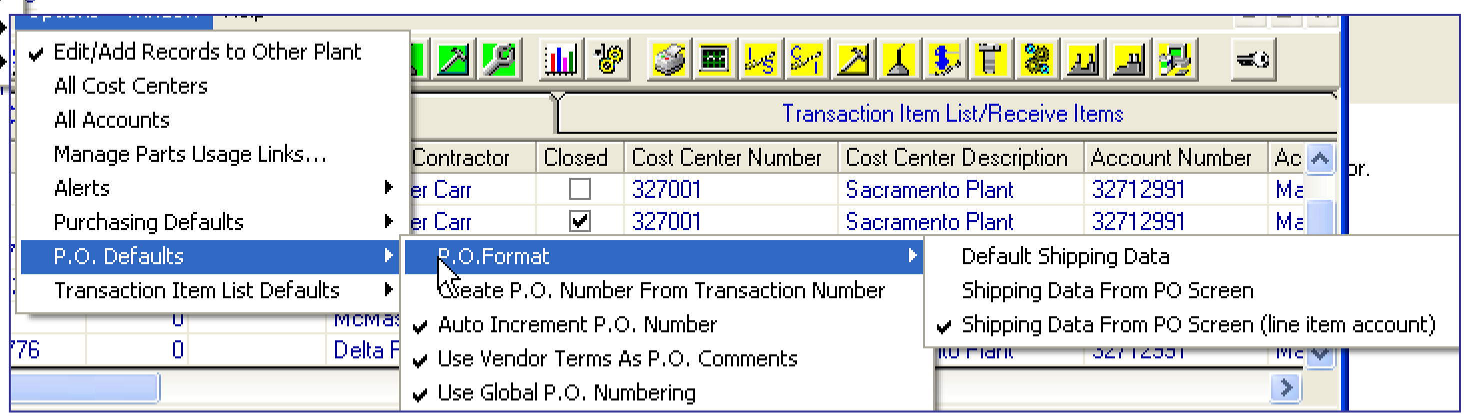
File Menu:
Save: save as excel, .csv or HTML (web page formats)
Print>>Purchase Order: Selected or you choose which purchase order
Print>>Print Stock Location List:Place received items in stock in the correct location.
Print>>Receival Note: Items received or not log of actual receival instance.
Print>>Report: Various analysis and other reports.
Print>>Labels: Received items one item per part number or label each part. Label creator.
Print>>Grid: Raw grid print.
Print>>Print Options: Send directly to printer, change printers, etc.
Exit: close this screen.



View Menu:
Create Requisition: opens main purchase requisition screen
Create Requisition - Inventory Tree: Open inventory tree view screen



Options Menu:
Edit/Add Records to Other Plant: requires special permission. Enable user to work with data from plant other than the plant user is a member of.
All Cost Centers: load all cost centers into drop-down not just cost centers from logged in plant.
All Accounts: load all accounts into drop-down not just accounts from logged in plant.
Manage Parts Usage Links: opens parts usage links screen.
Alerts: alerts below minimum stock, above maximum stock, etc.
Purchasing Defaults: set transaction (PO) defaults. These default typically populate various fields automatically but may be changed by user.
PO Defaults: defaults specifically for P.O.s such as auto-increment, P.O. format (three available), etc.
Transaction Item List Defaults: filter method for parts drop-down, either filter by part group or filter by vendor and other item list defaults.



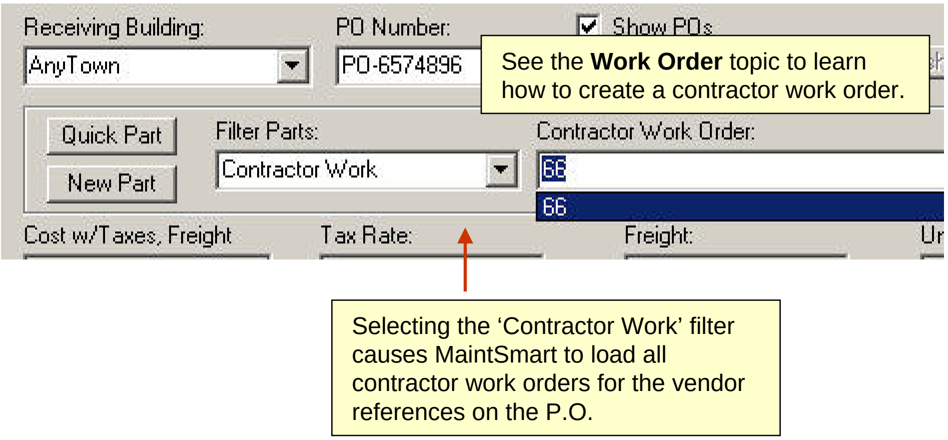
Purchasing - Contractor Work

Purchasing Contractor Work

Contractor work orders are unique when compared to in-house work orders in that they may be “purchased”. Contractor work and parts purchases may be included on the same P.O. To purchase contractor work follow these steps:

1. Create one or more contractor work orders from the work orders screen.
2. Open the purchasing screen then create a P.O. for the Contractor (vendor) that the work order references.
3. Click the Transaction Item List tab of the Purchasing screen.
4. Select the P.O. or transaction from the drop-down box.
5. From the Filter Parts drop-down box select Contractor Work.
6. All work orders referenced to the same Contractor (vendor) for the selected P.O. appear listed in the Contractor Work Order drop-down (Note: this drop-down label changed from Parts to Contractor Work based upon the Filter selection.
7. Complete the purchase as you would if you were receiving parts.

Note: One difference here is that all contractor work is assumed to be “received” at the moment it is added to a P.O.



Contractor Work Orders

Contractor work orders are used for work performed by outside help. Create contractor (outside labor) work orders from the MaintSmart work orders screen then add these work orders to a P.O. with or without other purchased items.

To add a new a contractor work order follow these steps:
1. Open the work order data entry screen.
2. Check the menu items: Contractor Work>>Create Contractor Work Orders.
3. Create the work order as you would any other work order except that now the Engineer drop-down becomes the Contractor drop-down and the Hours box becomes the Estimated Cost box.
4. Complete a contractor work order as you would any other work order.

To edit or delete a contractor work order follow these steps:
1. Select the contractor work order from the work order grid with a left mouse-click.
2. Press Delete button or edit the work order as needed in the boxes below the grid.
Note: MaintSmart detects what type of work order you clicked in the grid so there is no need to check the contractor work order menu item.

Using Spare Parts - Adding New Records

Spare Parts Usage:

To work with purchase transactions, transaction lists, and spare parts usage select from the button bar.

Follow these steps to record the use of spare parts.

Note: The part you plan to use must be created in the Inventory Set Up section before it can be used or use the Quick Part feature on the Parts Usage screen..

Adding a new Parts Usage Record

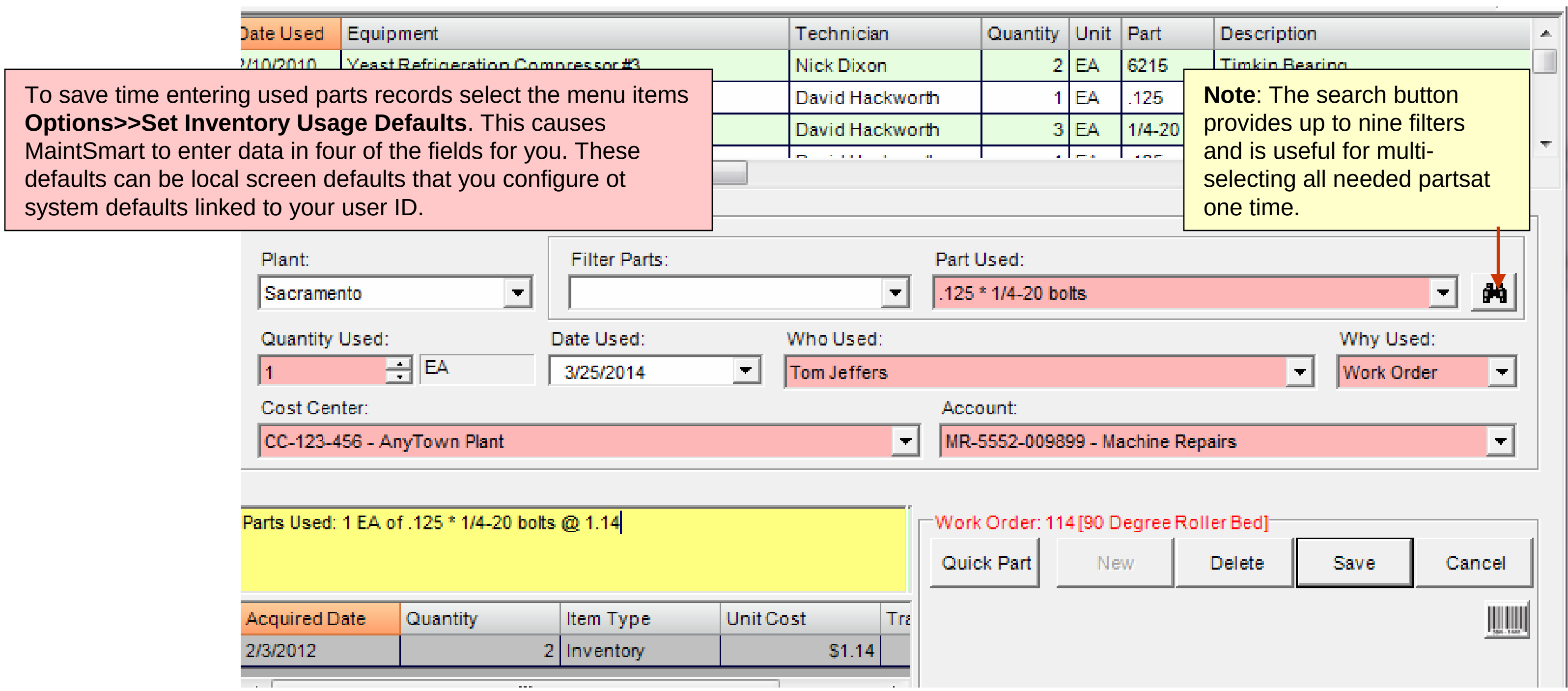
1. Press **New** then select the part to be used. Use the **Filter Parts** drop-down to narrow your search for the part.
2. Enter the date the part is being used. When the part is selected from the drop-down box the small grid at the bottom of the screen displays all of the parts with the ID number of the part you just selected. There may be two or more entries into inventory of the same part ID but with a different cost. Select the part from the small grid at the bottom of the screen by left mouse-clicking the grid row containing the part.
3. Enter the quantity of the part being used. The quantity must be greater than zero but not more than what is available.
4. Select who used the part from the drop-down box.
5. Determine why the part was used. Select the reason from the drop-down box. When the selection is made another screen shows listing work orders, down time instances, or simply equipment as appropriate. Select the actual use of the part from the grid by clicking the grid row containing the record that applies. By doing so you are telling the program why this part was used. This valuable information is used later to help you solve problems and maximize the effectiveness of you maintenance system.
6. Select the **Cost Center** and **Account Charged** then press **Save**.

Returning Used Parts to Inventory

To work with spare parts select from the button bar. Select the tab labeled Use Parts Stock. Follow these steps to return a part to inventory.

1. Select the part usage record from the grid by clicking the grid row containing the record.
2. Press **Delete**.
3. The part is returned to inventory automatically.

Note: See pages 140-144 for information on how to create bar-coded inventory labels and how labels are useful for performing inventory audits or using spare parts.



Using Spare Parts - Editing Records

Editing Parts Usage Records

To work with spare parts select from the button bar. Select the tab labeled Use Parts Stock. To edit an existing used part record left mouse-click on the grid row containing the record. You can edit the quantity, who used the part and why the part was used. Follow these steps to edit a record:

1. Select the record from the main grid by left mouse-clicking the grid row containing the record.
2. Make changes by entering a different quantity, and/or selecting different values from the Why Used and Who Used drop-down box.
3. Press Save to keep the changes.

Note: If you lower the quantity during an edit of inventory parts used the remaining parts are returned to inventory automatically.

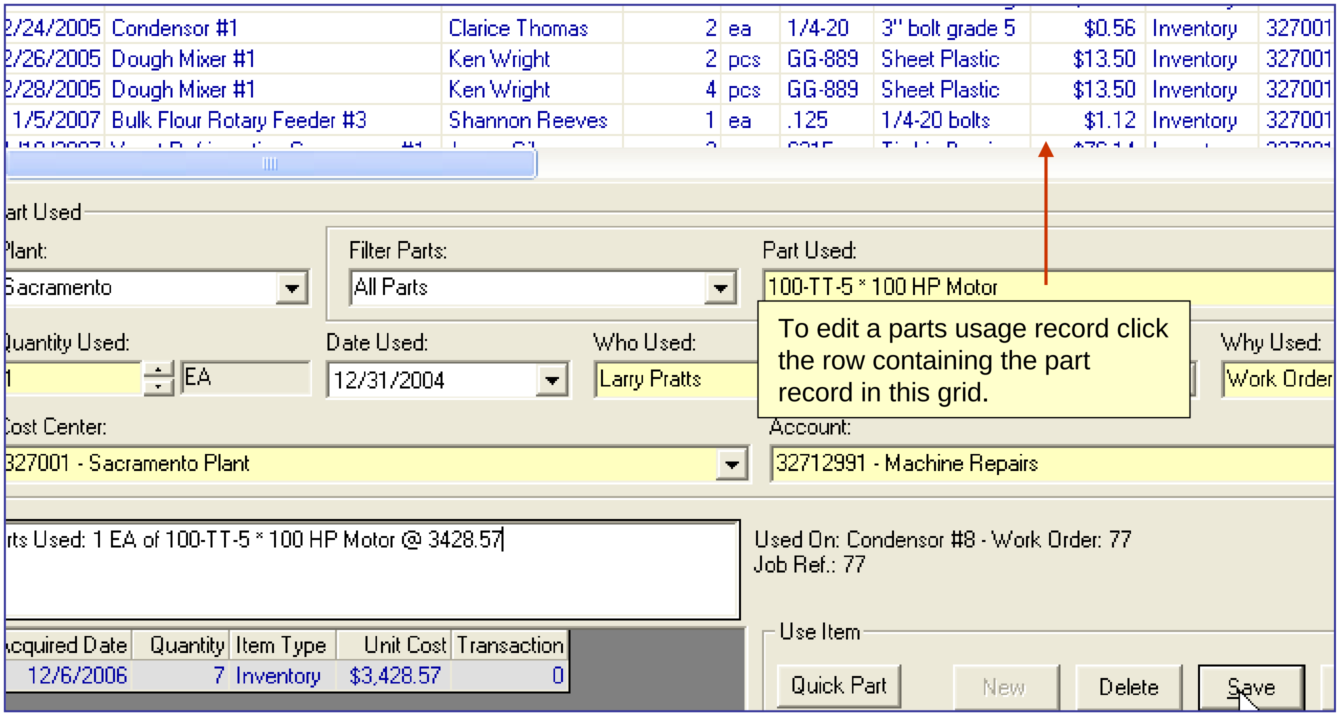
Returning Used Parts to Inventory

To work with spare parts select from the button bar. Select the tab labeled Use Parts Stock. Follow these steps to return a part to inventory.

1. Select the part usage record from the grid by clicking the grid row containing the record.
2. Press Delete.
3. The part(s) is/are returned to inventory automatically.

Under Minimum Stock Notification

While using spare parts if the stock level for the part falls below minimum stock level a message in red text appears near the data entry button. Four reports are available from the menu items **File>>Print>>Report>>Re-Order Reports.** These reports are very useful for replenishing spare parts stock. Over maximum stock levels are also displayed on a couple of these reports.



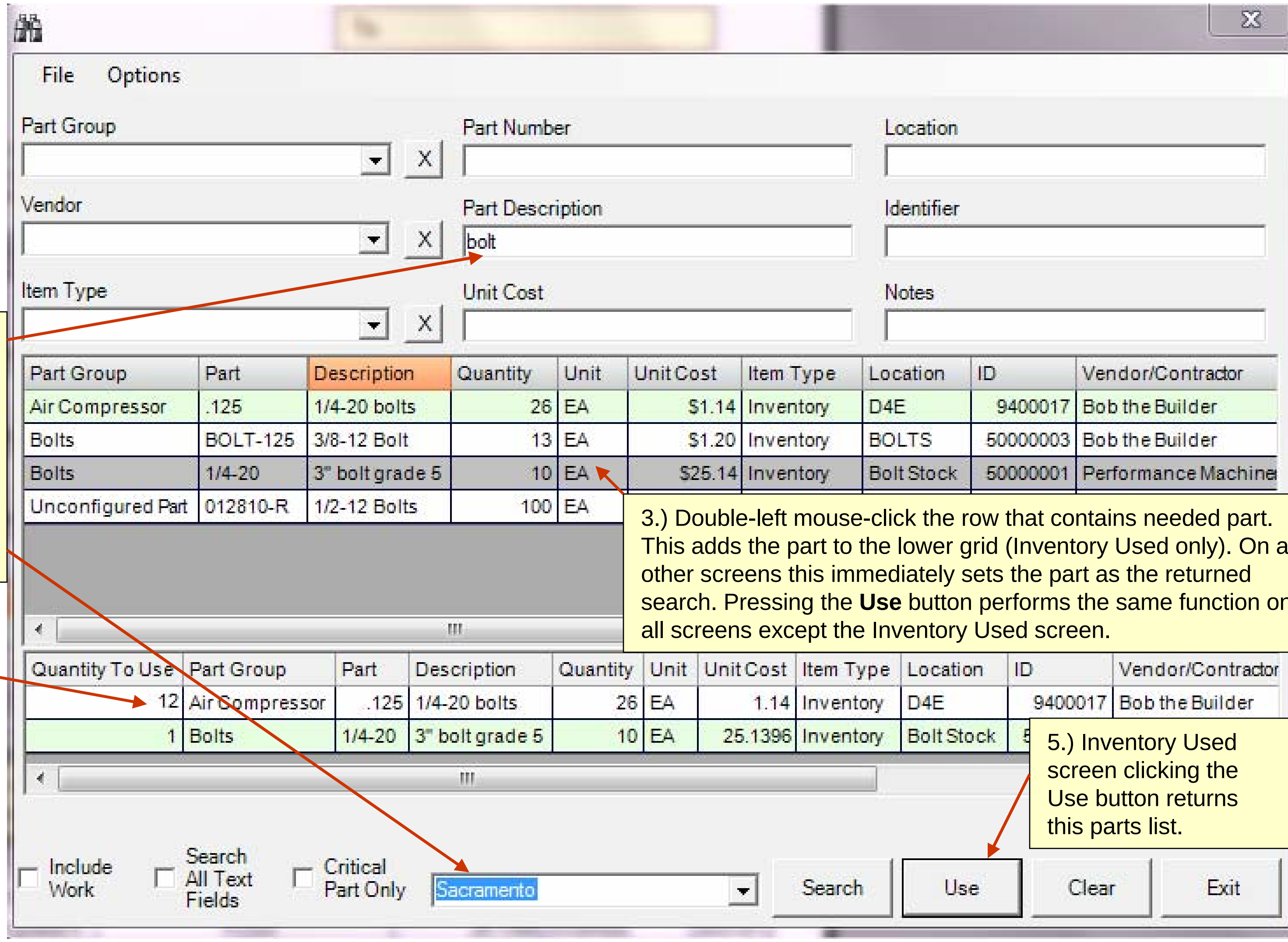
Using Spare Parts - Searching for Parts

Part Search Screen

The spare parts search screen is available from the Inventory Used, Purchasing (Item List), Inventory Set-up, Quotes, Requisitions, Requisition Approval and Parts-Linking screens. In all cases except for the inventory set-up screen selecting a part from the Parts Search screen causes that part (or multiple parts in the case of Parts Usage screen) to be used as the selected part. On the Inventory Set-up screen selecting a part from the Parts Search screen causes the part to be located and highlighted in the data grid. See notes below for how to use this screen.

1.) Begin by clicking the Parts Search button on any of the above listed screens.

2.) Choose/type one or more of the filters available Leaving all filters blank loads all parts for this plant. Leaving the Plant field blank loads all parts for all plants. Press **Search** button.



3.) Double-left mouse-click the row that contains needed part. This adds the part to the lower grid (Inventory Used only). On all other screens this immediately sets the part as the returned search. Pressing the **Use** button performs the same function on all screens except the Inventory Used screen.

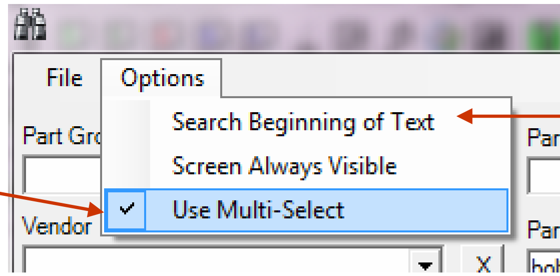
4.) Inventory Used screen Only: Left-click into the Quantity field in the lower grid then type in the correct quantity.

5.) Inventory Used screen clicking the Use button returns this parts list.

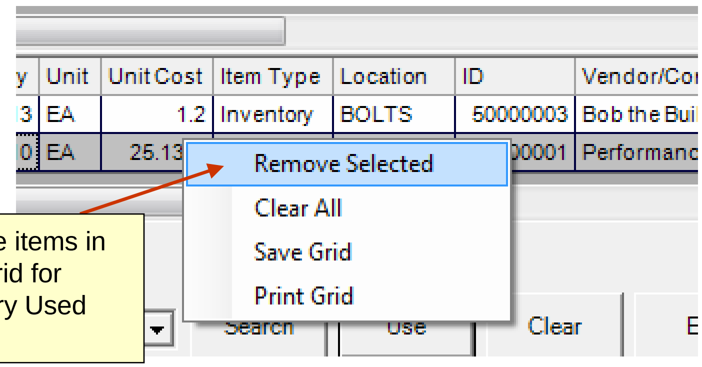
Part Search Screen - Options

The spare parts search screen is available from the Inventory Used, Purchasing (Item List), Inventory Set-up, Quotes, Requisitions, Requisition Approval and Parts-Linking screens. In all cases except for the inventory set-up screen selecting a part from the Parts Search screen causes that part (or multiple parts in the case of Parts Usage screen) to be used as the selected part. On the Inventory Set-up screen selecting a part from the Parts Search screen causes the part to be located and highlighted in the data grid. See notes below for how to use this screen.

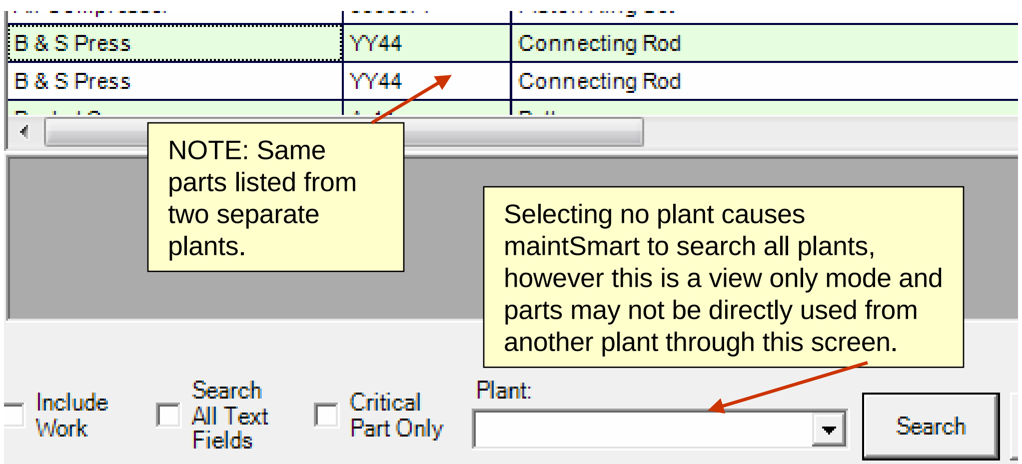
Multi-Select parts applies to Inventory Used screen only..



Unchecked cause text search anywhere within the text string.



Remove items in lower grid for Inventory Used search.



NOTE: Same parts listed from two separate plants.

Selecting no plant causes maintSmart to search all plants, however this is a view only mode and parts may not be directly used from another plant through this screen.

Inventory Part Linking - to Work Order Templates and PMs

Inventory Part Linking – An Overview

MaintSmart provides a simple way to link needed inventory parts to work order templates and PM task/equipment combinations. With part linking you set the parts needed and the quantities of each. When the linked work order template is *created* the linked parts are used from inventory. Linked PM task/equipment combinations work slightly differently in that the parts are actually used from inventory when the PM is *marked completed*.

When part linking is activated either (through work order creation or PM task completion) a small grid appears displaying the linked parts. In the case where needed parts were not available the grid row containing the shortage appears with a red background. Several options are available for printing this linked parts grid.

Three part linking options are available for linked work orders and PMs as follows:
1. **Always Create Work Order** (regardless of part availability)
2. **Create Work Order If All Parts Are Available**.
3. **Deactivate Parts Usage Linking**.

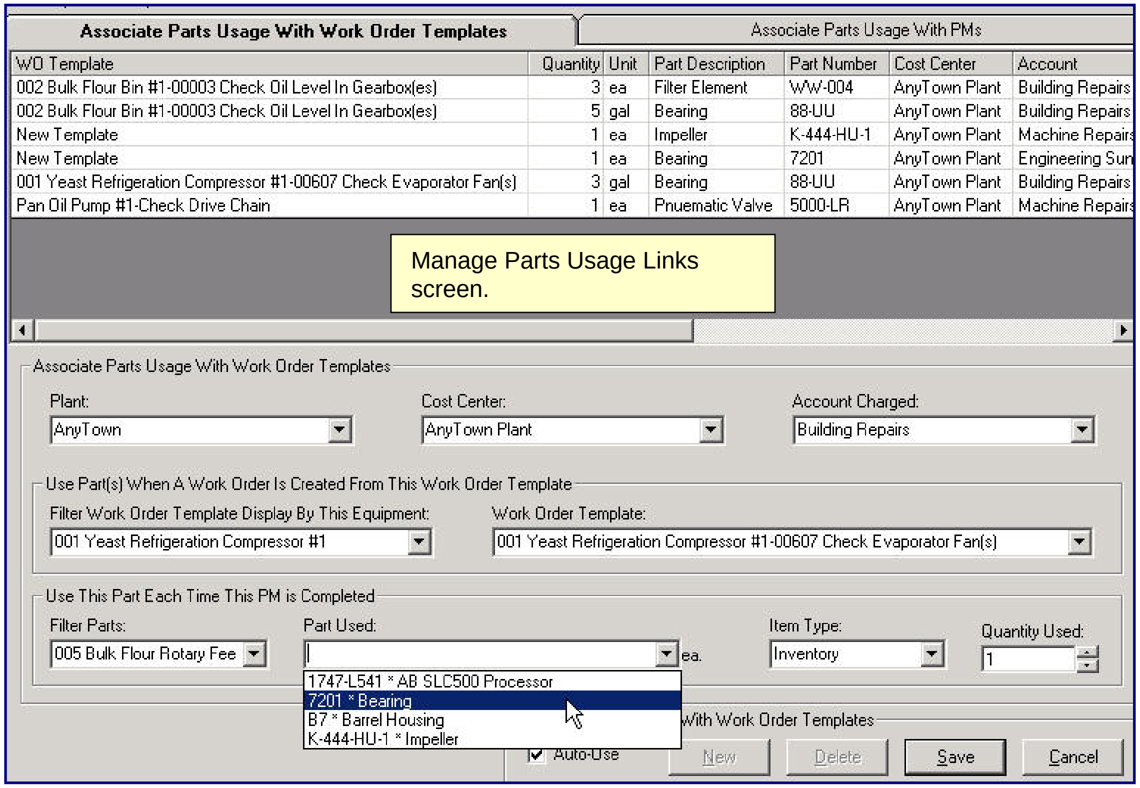
Part Linking Options

Part linking options are available from the **Associate Parts Usage With Work Order Templates and PMs** screen as well as from their prospective Work Order or PMs Update screens.

Options Available from "Associate Parts Usage With Work Order Templates and PMs" screen:

1. Save Last Values: saves the last values entered either from the menu item **Options>>Set Work Order Defaults>>Save Last Values** or **Options>>Set PM Defaults>>Save Last Values**. After entering one record into either the work order or PM screen the next time you press the **New** button these values are restored.
2. Use Work Order or PM Defaults: automatically uses default values for cost center, account and item type whenever a new record is created. To set default values choose the menu items **Options>>Set Work Order Defaults>>Cost Center (or Account, Item Type)** then enter the appropriate value. After setting one or more of these default values you'll need to check the menu item **Options>>Set Work Order Defaults>>Use Work Order Defaults.**

Note: In the case of PMs substitute the word 'PM' where you see the words 'Work Order' in the menu text above.



Options Available from" Work Orders" data entry screen menu items "Options>>Parts Usage>>"

1. Always create work orders: By checking the menu item **Always Create Work Order. Display Listing of Parts Used and Shortages (highlighted in red)** whenever you attempt to create a work order whether it be from a work order template or a metered template MaintSmart will create the work order regardless of whether or not the linked parts are available. A small grid screen pops up that displays parts used and shortages in red.
2. Only create a work order if all parts are available: By checking the menu item **Create Work Order If All Parts Are Available. Display Listing of Parts Used and Shortages** whenever you attempt to create a work order whether it be from a work order template or a metered template MaintSmart will create the work order only if all of the linked parts are available. A small grid screen pops up that displays parts used and shortages.
3. To temporarily disable part linking select the menu item: **Deactivate Part(s) Usage Linking.**

Options Available from "Validate PM Tasks" data entry screen menu items "Options>>Parts Usage>>" :

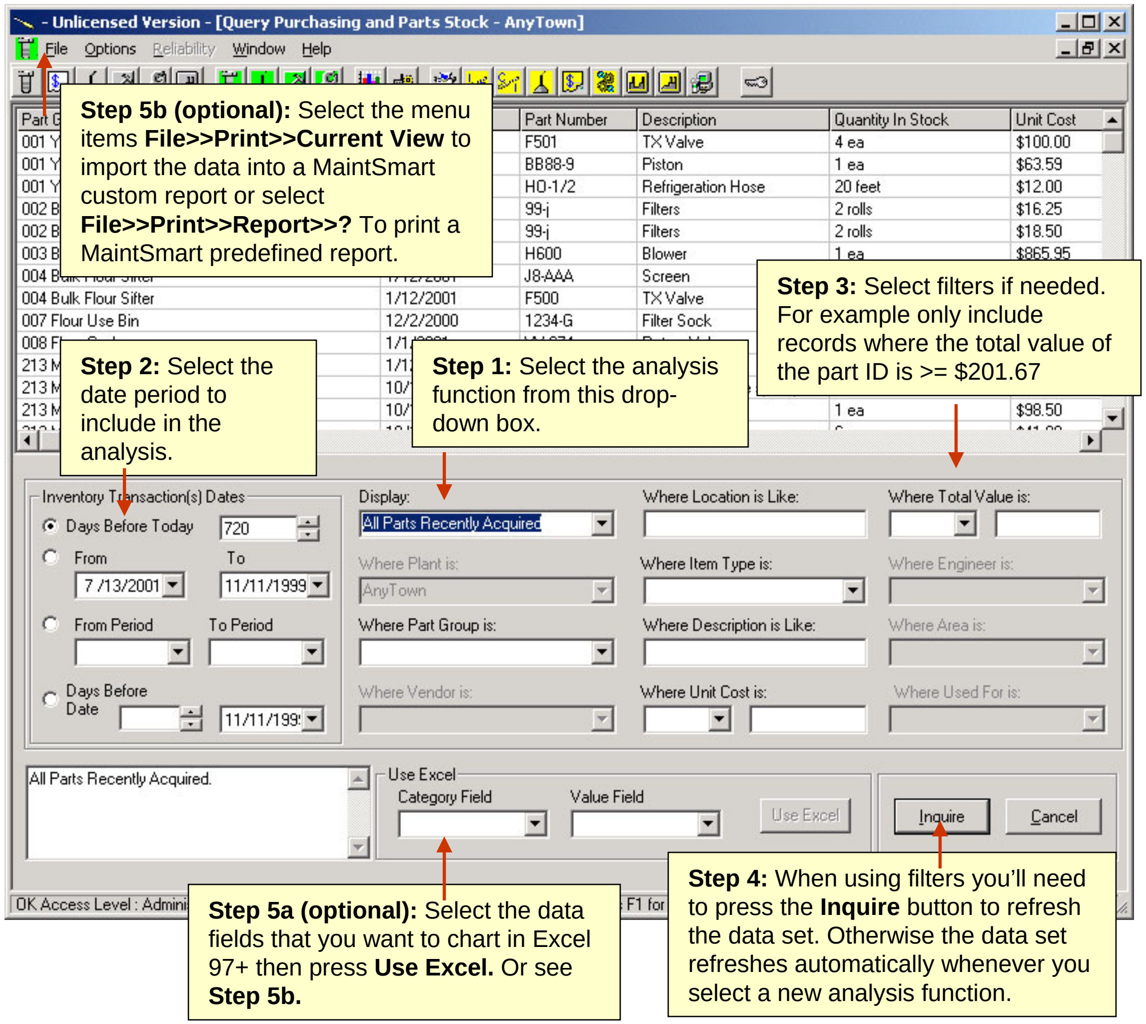
1. To temporarily disable part linking select the menu item: **Deactivate Part(s) Usage Linking.**

Inventory Analysis

Analyzing Inventory

To analyze inventory select [button] from the button bar(Inventory Analysis and Query). The following analysis and query scenarios are available:

1. **All Parts Recently Acquired** displays all parts acquired between the selected date period. Filters included part group, location, item type, description, unit cost and total value.
2. **All Spare Parts Used** displays spare parts used during the specified date period. Filters are equipment, vendor, item type, description, unit cost, total value, cost center and account.
3. **Spare Parts List by Location** is useful for quickly locating parts, performing inventory audits and reordering.
4. **Parts by Vendor** displays all spare parts by vendor. Records can be filtered by vendor, location, description, unit cost, total value, cost center and/or account.
5. **Purchased Parts Stock Items by Vendor** provides a list of parts where the parts were acquired through a purchase transaction referencing a vendor (not necessarily a preferred vendor).
6. **Parts Used by Account** shows charges to accounts by fiscal period for parts used during selected time period. Filter by vendor, total value, cost center and/or account.
7. **Parts Used by Area/Equipment** displays parts used on an equipment item during a specific time period. Filters are equipment, description, total value and area.
8. **Parts Used by Part Group** displays a list parts used associated to that part's part group. Filters are part group, description and total value.
9. **Parts Used by Vendor** displays a list of parts used during a specified time period and includes the vendor who supplied the part. Filters are vendor, description, total value, cost center and payment type.
10. **Parts Used by Who** supplies information about the use of parts during a specified time period including the maintenance engineer who used the part. This query also includes why the part was used.
11. **Purchase by Part Group** totals purchases for each fiscal period and groups them by part group. Filters are vendor, cost center, account and payment type.
12. **Purchases by Account** sums all purchases by account and fiscal period. This is especially useful for determining total charges to an account each period. Filters are part group, vendor, item type, cost center, account and payment type.
13. **Purchases by Cost Center** shows the total purchase costs grouped by cost center, fiscal period and item type. This is useful for determining if your purchases are in line with your budget. Filters are part group, vendor, item type, cost center, account and payment type.
14. **Purchases by Vendor** displays the total expenditure per vendor per fiscal period. Filters are vendor and total value.
15. Several more predefined reports are available form the menu items **File>>Print>>Report**.
16. **All Spare Parts Used by Department**.



To enable you to get the most out of the Inventory Analysis and Query be sure you understand the following topics:

- What additional functionality do data grids provide? Page 6
- How do I create a grid report? Page 118
- How do I create a detail report? Page 116
- How do I create an Excel report? Page 117

Inventory Reporting

To analyze and report on inventory select from the button bar, Inventory Analysis.

Many of the user filtered reports may be printed as a MaintSmart Detail report. Detail reports are intrinsic MaintSmart reports. Many contain charts and nearly all of them contain summaries of various columns. For more information on detail Reports turn to page 116.

To create a MaintSmart detail report of the current data set select the menu items in the screen **File>>Print>>Current View>>?** Not all data sets support detail reports in which case you'll need to perform a grid print. Notice the menu items in the screen shot in the menu box farthest to the right. These items are pre-defined MaintSmart detail reports (**Parts List, Inventory Audit**, etc.) The last four items in this menu box are disabled. The reason for this is accessing these menu items gives you access to other plants or top-level entities records. This requires the access permission **Edit Other Plants**. This permission is given by the MaintSmart system administrator. See the section on user access permission on pages 15-16 of this manual.