

SMART Equipment Manager

The SMART Equipment Manager is an affordable, easy-to-use software solution capable of storing, tracking, and managing your equipment servicing program.

The system operates in single-user mode or can be configured for multi-user client-server operation. SMART is available for both IBM and MAC operating systems.

Key Capabilities:

- Manages all types of equipment and produces alerts when servicing is needed
- Alerts can be based on hours of operation, miles traveled, or time/date intervals
- The system provides 10 user-definable fields to track any information you require
- The system tracks items such as:
 - Vehicle servicing
 - Equipment inspections and servicing
 - HVAC system maintenance
 - Laboratory equipment servicing and calibration
 - Computer maintenance and system back-up events

Benefits:

- Extends life of equipment by ensuring it is properly maintained
- Saves time by tracking required maintenance activities for you
- Provides quick and easy access to maintenance history and service provider information

Instructions:

These instructions are to be used as a guide as you move through the software. Sample data is available in the system.

Getting Started:

From the home page, click on the Equipment Management button. Click on the record you are interested in, then click on the Details Tab at the top of the screen. To ADD a record, click on the + button at the top of the screen.

General Information:

The intention of this module is to enable you to record general information and location information for the company asset or equipment. There are ample fields provided to describe the equipment, to record equipment features, and to record notes relevant to that piece of equipment. If you like, you can also insert a photograph of the asset.

Preventative Maintenance Reading:

For items you wish to track by hours or miles, you will want to periodically update the miles or hours that have been used for that piece of equipment. For example, your staff may submit monthly engine hours or mileage readings for equipment. These updates would be entered into the PM reading field for each piece of equipment.

Preventative Maintenance Units:

The Preventative Maintenance (PM) Units field is used to characterize the PM reading. For example, if you are recording miles of a vehicle, you would select MILES for the PM Unit. If you are tracking hours of operation, you would select HOURS.

To embed a photo:

Right-click in the photo field and select “insert picture” from the drop-down menu. Navigate through your hard disk or network to locate the image file relevant for this record. Select the desired file and click the INSERT button. Wait a moment, and that image will appear in the final field of the Equipment detail record. If you wish to change the photo displayed in the general information screen you can repeat the photo insert operation and replace the existing image with a new image, or you can click into the photo field and press the back space key and the existing photo will be cleared.

Equipment module user definable fields:

There are ten user definable fields provided in the equipment management details screen in the **User Fields** section. The field labels for these ten fields can be adjusted on the **preferences screen** from the main menu.

You should consider the use for these ten fields in advance. Once you begin to add data to the system in a particular field you must be careful to continue to use that field for the same purpose or clear existing data if you redefine the field label.

The fields are all set up as text data so you can enter numbers, dates or text strings in each one. Each user definable field has its own user definable pull down menu. Click into the field you are interested in and click on the edit choice at the bottom of the drop-down list and you can modify the choices which are presented for that field. You can easily paste text into the drop-down menu edit box from another application. Each choice on the drop down list edit box should be followed by a Character return.

Equipment Maintenance/Calibration Details:

In this section of the equipment detail screen you can record both scheduled and completed maintenance and calibration events for the equipment. On each line you will see fields for date, work order status, item, last reading, interval type, an interval to next, interval units, due at, status, date completed, embedded image, and notes.

There are three types of intervals that the program understands. You can record/schedule events by date, by hours, or by mileage. Select the appropriate interval type from the drop down list in the interval type field.

For example, you can track when an oil change is due for a vehicle, or the calibration is due on an instrument.

Track events by date:

Enter the date you performed the event last. Select interval type of "By Date", and enter the number of days in the interval before the item is due to be repeated. The program will use the computer's internal clock to determine the status of this item compared to the last date and specified interval.

Track events by mileage:

To track events by mileage, like tire rotation, enter the item, put in the mileage of the last tire rotation, enter the interval of say 3,000 and select an interval type of "By Miles". Now, periodically, return to this record and update the PM Reading to reflect the odometer reading. The system will track the last rotation, the desired interval, and will report action based on the miles reported in the PM reading.

Track events by hours:

To track events by hours, like for oil changes on a marine engine, enter the item, put in the engine hours of the last oil change, enter the interval of, say, 300 and select an interval type of "By Hours". Now, periodically, return to this record and update the PM Reading to reflect the engine hour reading. The system will track the last rotation, the desired interval, and will report action based on the hours reported in the PM reading.

To start, click into the next available row and select an item to track. Next, select the interval of time, mileage, or days between now and when you want to be reminded to perform this item again. For example, if you want to check the calibration on an instrument every 180 days, you would put in a date for the last reading, select "by date" for the interval type and put in the number 180 for the "interval to next". Select days as your interval unit. The program will calculate the appropriate **due at** message which, in this case, would be a date.

The status should read OK. You can adjust the interval at which the status will change for each item on the **preferences screen from the main menu**. There are three interval warning types available in the system. You can specify an interval for mileage events, date events, or hourly events. This interval will be used by the software to determine whether to display the status of OK, AN for action needed, or PD. for past due.

On the blank line below the item you can record notes for that particular event. If you

wish to embed a scanned image, or a document or photograph with this event, you can right click in the field directly beneath the camera icon and right-click on **insert photo** or **insert object**. Then, navigate to the file where it is stored on your computer or network and select the file. It will then be inserted into the record. Be careful not to embed any excessively large documents as this will impact the speed of the overall system.

When a particular maintenance item is completed, you should select the work order status field directly beneath the date and **change it from scheduled to completed**. This will then change the status from whatever it is to Done.