QUICK GUIDE FOR PM5

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Introduction

This document is intended to provide a quick overview of preventive maintenance planning application PM5, developed by PCSYS A/S.

This quick guide starts with a description of the main components of PM5 client. It then proceeds with walkthroughs of commonly used functions. These walkthroughs are to be used together with the demo database included with the PM5 installation package.

Please notice – this document does not provide information about installation of PM5 client on the computer. If this information is needed, please refer to Installation manual, which can be found on following link. <u>http://www.pm5.dk/Download</u>.

PM5 User interface

PM5 user interface consist of four major parts (see the picture on following page):

- Navigation tree this component displays the location structure used in PM5. This structure is presented in form of a tree structure. The navigation tree is entirely user defined and can contain as many locations as necessary, in multiple levels.
 When a location is selected, PM5 automatically filters information. Only data relevant to the selected location and locations below it is displayed on the screen.
 In the demo database, the location structure is divided in two parts building and production line. Each of these sections are then specified in more details.
- 2. Main menu the menu bar gives user access to settings and functions of PM5.
- 3. Main data grid here, core data of the system is displayed, formatted in a data grid. There are five sections with core data in PM5:
 - a. List of items that need maintenance service, referred to as *machines* in the remainder of this document.
 - b. List of *tasks* defined in the system.
 - c. List of *spare parts* in the system.
 - d. List of *suppliers* associated with machines and spare parts.
 - e. List of *activities* and *faults* reported in the system. Both activities and faults are referred to as *jobs* in the remainder of this document.
- 4. Detail information panes below main data grid is the detail section. Content of this section depends on what main data grid is currently displayed on the screen.

File View Tools	Filter Help	and the second se	Achter (Laude				Δ.	CSYS Maintenance	5 - Logged In: pm5	- Licensee: D	сто		× • •
EM5				1			,				•		
E Buildings	Machine Number	ID Code	Machine Name	Locat		ate	lype	Supplier	Account Number	Hnce	Stop Group Ac	tive	
E-C Building - Main	003982.00	90	Packing Line. Component	1 Machir	te Group 1	\$/2003	Packing Machine	Solar				Þ	
Hall B	903982.01.01	90	Packing Line, Component	2A Machir	te Group I 1/	5/2003	Packing Machine	Solar				Þ	
Building - Secondary Room 101	303982.01.02	90	Packing Machine, Compo	nent 28 Machir	te Group I 1/-	6/2003	Packing Machine	Solar				Þ	
Room 102	903982.02	90	Packing Machine, Compo	nent 3 Machir	te Group I 1/	6/2003	Packing Machine	Solar				Þ	
D-C Production	305543.00	17	Router Machine 17	Machir	he Group III 10	/6/1994	Router Table	SKF				Þ	
Machine Group I	305543.01	17A	Router Machine 17, Com	onent 1 Machir	he Group III 10	/6/1994	Router Table	SKF		0-0		Þ	
Machine Group II	905543.02	17B	Router Machine 17, Comp	onent 2 Machir	te Group III 10	/6/1994	Router Table	SKF				Þ	
Production Line 2 Addrine Group III	905547	LT01	Loading truck 01	Buildin	g - Main 10	/6/1994	Electric Loading	. ErgoLift				Þ	
Machine Group IV	3856	LT02	Loading truck 02	Buildin	g - Secondary 7/	1/2005	Electric Loading	ErgoLift				Þ	
~						\sim							
	Page 1 showing 1 to 10 of Machine located at: Produ	total 10 ction - Production Line	e 1 - Machine Group I										(4) (4) Page 1 /1 (5) (4)
	Details Tasks Activit	ties Spare Parts	Faults Stop Attact	ments									
	Machine Propertie	S		Custom Machi	ne Properties								
	Canach (100 K Achre Measured Farmeter Packing Line Aurring Unt	Power Luke N 8	eserved Value	Joup Name Select					\				
V Filter													



Walkthrough A – Navigating and accessing information in PM5

- 1. Launch PM5 client and enter user credentials. In login screen enter **pm5** in both fields 'User name' and 'Password'.
 - PM • • • • • • PCSYS Maintenance 5 - Logged In: pm5 - Lice Suppliers Activities / Fa +-- 🦢 PM Packing Line 903982 Packing Machine 903982./ Packing Line, Componen acking Machine 903982.01.0 90 Packing Line, Component 2A Machine Group I 1/6/2003 Packing Machine Sola 903982.01.02 90 Packing Machine, Component 2B Machine Group I 1/6/2003 Packing Machine Sola 903982.02 90 Packing Machine, Component 3 Machine Group I 1/6/2003 Packing Machine Sola 5 SKF 905543.00 Router Machine 17 Machine Group III 10/6/1994 Router Table V 5 17A 905543.01 Router Machine 17, Component 1 Machine Group III 10/6/1994 Router Table SKF 5 905543.02 178 Router Machine 17, Component 2 Machine Group III 10/6/1994 Router Table SKF ErgoLift ErgoLift 905547 LT01 Loading truck 01 Building - Main 10/6/1994 Electric Loading ... dary 7/1/2005 LT02 Building - Secon 9856 .oading truck 02 Bectric Loading ... 5 Page 1 showing 1 to 10 of total 10 Machine located at: Production - Production Line 1 - Machine Group I (M) (M) Page 1 /1 ()) ()) Details Tasks Activities Spare Parts Faults Stop Attachments View Activity Printable Fault Printable File Name Path Delete Attachmen Add Attachment Edit Attachment 🖤 Filt
- 2. Once the client is launched, the client should look something like this.

3. Ensure that in the navigation tree, the location *PM5* is selected by clicking once on it. Next, with the mouse pointer still hovering over selected location, click once on the right mouse button to access the quick menu. You should now see this menu.

		🧭 😫 l 🗉	• 📳 省) Y 🕫				
-	ile	View	Tools	Filter	Help			
Location				Machines	Tasks	Spar	e Parts	Suppliers
. ⊕ 📄 PM5	5			Machine N	umber	Δ	ID Code	
	New	Machine		903982			90	
	Refre	esh		903982.00			90	
	Prope	erties		903982.01.0	D1		90	
	Expand all			903982.01.0	02	90		
	Collar	ose all		903982.02			90	
			1	905543.00			17	
				905543.01			17A	

4. In the quick menu, select *Expand all* to see all locations in the navigation tree. When this is done, the navigation tree should look like this.



The navigation tree works just like the directory tree in Windows File Explorer. The entire tree or parts of it can be expanded or collapsed by clicking on + and – icons displayed to the left of location icon.

Press on – icon beside location *Production*. The navigation tree should now look like this:



To expand list of locations under *Production*, press on the + icon. You could also use same method as in step 4 – click on *Production*, then right-click and select Expand all from the quick menu.

5. At the moment, the currently selected location is the one on the very top of the navigation tree. This top location is by default called *PM5*. When this location is selected, PM5 client will show all data in the system, without filtering it based on selected location. Therefore, the client now shows ten different machines in *Machines* data grid.

Machines Tasks Spar	re Parts Suppliers	Activities / Faults				
Machine Number 🛛 🔺	ID Code	Machine Name	Location	Date	Туре	Supplier
903982	90	Packing Line	Machine Group I	5/1/2010	Packing Machine	Solar
903982.00	90	Packing Line, Component 1	Machine Group I	1/6/2003	Packing Machine	Solar
903982.01.01	90	Packing Line, Component 2A	Machine Group I	1/6/2003	Packing Machine	Solar
903982.01.02	90	Packing Machine, Component 2B	Machine Group I	1/6/2003	Packing Machine	Solar
903982.02	90	Packing Machine, Component 3	Machine Group I	1/6/2003	Packing Machine	Solar
905543.00	17	Router Machine 17	Machine Group III	10/6/1994	Router Table	SKF
905543.01	17A	Router Machine 17, Component 1	Machine Group III	10/6/1994	Router Table	SKF
905543.02	17B	Router Machine 17, Component 2	Machine Group III	10/6/1994	Router Table	SKF
905547	LT01	Loading truck 01	Building - Main	10/6/1994	Electric Loading	ErgoLift
9856	LT02	Loading truck 02	Building - Secondary	7/1/2005	Electric Loading	ErgoLift

6. Now, find the location *Buildings*, which is placed directly under the location *PM5*. Select it by clicking on it once. Observe that once *Buildings* is selected, the list of machines in data grid to the right, has been reduced to two machines.

Machines 1	Tasks Spa	re Parts S	uppliers	Activities / Faults				
Machine Numb	ber 🛛	ID Code		Machine Name	Location	Date	Туре	Supplier
905547		LT01		Loading truck 01	Building - Main	10/6/1994	Electric Loading	ErgoLift
9856		LT02		Loading truck 02	Building - Secondary	7/1/2005	Electric Loading	ErgoLift

 The blue background of the row showing record of machine *Loading truck 01* indicates that this is the machine currently selected in machine data grid.
 When a record in data grid is selected, the information in the *Detail* section of PM5 client displays information that belongs to that record.

In the *Detail* section, click on the pane labeled *Faults*. There, you will see that machine *Loading truck 01* has a single fault reported in on 24th October 2017.

Page 1 showing 1 to 2 of total 2 Machine located at: Buildings - Building - Main								
_								

- 8. Click on the other machine on the list, the one called *Loading truck 02*. The fault list should now be empty.
- 9. Select machine *Loading truck 01* again. Next, double-click on that machine's record in data grid. This action will bring up Machine form with data belonging to the machine. It should look like the picture below. Here, you can edit data of this particular machine. To save any changes, press the *'Save'* button. To close the form, press the *'Cancel'* button.

	×
Machine Number	Supplier
905547 🔽 Active	Ergo Lift 💌
ID Code	Manufacturer
LT01	Caterpillar
Machine Name	Account Number
Loading truck 01	Select
Location	Price
Building - Main	
Date	Capacity
10/ 6/1994	
Туре	Power
Electric Loading Truck	
Machine Note	Stop Group
	Select
	Use Measured Value
	Measured Parameter
	Select
	Unit Units Per Day
	Save Cancel

To continue with the tutorial, now press on the 'Cancel' button.

10. Ensure that machine *Loading truck 01* is still selected in the *Machine* data grid and that pane *Faults* is still selected in the *Detail* section. Double-click on the fault listed in the *Faults* section. This action switches the view in main data grid to, the list of activities and faults registered in PM5. The job that is double-clicked will automatically be preselected.

You should now see this on the screen.

		Suppliers Activit	ies / Faults					
Fault	Task Name // Fault Type	Machine Name	Machine No	Date /	Done Date	Estimated	Fixed Date	Priority
V	Electric	Loading truck	905547	10/24/2016		0.00		
Page 1 showing 1	to 1 of total 1	Main	_	-	_	_	-	
Page 1 showing 1 Machine located a	to 1 of total 1 t: Buildings - Building	Main			_	_		
Page 1 showing 1 Machine located a Details Spare R	to 1 of total 1 t: Buildings - Building Parts Stop Atta	- Main schments Extern	al Services			_		
Page 1 showing 1 Machine located a Details Spare F	to 1 of total 1 t: Buildings - Building Parts Stop Atta / Faults Properties	- Main schments Extern	al Services	_				
Page 1 showing 1 Machine located a Details Spare F	to 1 of total 1 t: Buildings - Building Parts Stop Atta / Faults Properties	Main schments Extern	al Services			_	_	
Page 1 showing 1 Machine located a Details Spare F Activities / Fault Descrip Auxiliary disp	to 1 of total 1 4: Buildings - Building Parts Stop Attr / Faults Properties Non New Yorks don't turm on	- Main schments Extern	al Services Solution Batteries are flat an	id need to be replaced				
Page 1 showing 1 Machine located a Details Spare F Activities / Fault Descrip Ruollary disp	to 1 of total 1 8: Buildings - Building Parts Stop Attr / Faults Properties tion Jay lights don't tum on	Main schments Extern	al Services Solution Batteries are flat an	d need to be replaced				_
Page 1 showing 1 Machine located a Details Spare F Activities / Fault Descrip Ausliary disp	to 1 of total 1 #: Buildings - Building Parts Stop Attz / Faults Properties Nion Jey lights don't turn on	- Main schments Extern	al Services Solution Batteries are flat an	id need to be replaced	1. 🗡			
Page 1 showing 1 Machine located a Details Spare F Activities / Fault Descrip Audiary disp	to 1 of total 1 4: Buildings - Building Parts Stop Attr 7 Faults Properties tion kiey lights don't turn on	- Main schments Extern	al Services Solution Batteries are flat an	id need to be replaced				_
Page 1 showing 1 Page 1 showing 1 Packine located a Details Spare F Activities / Fault Desortp Audiany dap	to 1 of total 1 4: Buildings - Building Parts Stop Atta 7 Faults Properties tion Nay lights don't turn on	- Main schments Extern	al Services Solution Batteries are flat an	d need to be replaced	i. ×		-	
Page 1 showing 1 Machine located a Details Spare F Activities / Fault Descrip Rudiary dap	to 1 of total 1 4: Buildings - Building Parts Stop Atta 7 Faults Properties Nion Nay lights don't turn on Nay lights don't turn on	Main uchmenta Extern	al Services Solution Batteries are flat an	id need to be replaced	4. ×	-	-	

11. Currently, there is only one job listed in 'Activities/Faults' data grid. That is because of the location selected in the navigation tree is *Buildings*. Change selected location to *PM5*, to show the complete list of activities and faults currently registered in the system. Once location *PM5* is selected, the list of activities and faults should look like this.

Machines Task	s Spare Parts Suppliers	Activities / Faults								
Fault	Task Name // Fault Type	Machine Name	Machine No	Date 🗠	Done Date	Estimated	Fixed Date	Priority	Signed By / Solved By	Job No
	Weekly Service Router 17	Router Machine 17	905543.00	10/3/2016	10/3/2016	0.00			pm5	119
	Weekly Service Router 17	Router Machine 17	905543.00	10/10/2016	10/11/2016	0.00			pm5	120
V	Part Failure	Packing Line, Component 1	903982.00	10/12/2016	10/17/2016	0.00			EF	122
	Weekly Service Router 17	Router Machine 17	905543.00	10/18/2016		0.00			-????-	121
V	Electric	Loading truck 01	905547	10/24/2016		0.00			-77777-	123

12. Just like in the *Machines* main data grid, individual jobs are selected by clicking once on the record. Double-clicking on the job will bring up its Job Form. Please test this now, but don't make any changes in the data. To close the Job Form press the *Cancel* button.

	×		×
Machine 903982.00 - Packing Line, Co	omponent 1 Job No 122	Signed By	Job No Priority
		Select	121
Fault Type	Estimated Manhours	To Be Signed By	
Part Faiure	0.00	AB	Done Started Fixed Date
Discovered (Date)	Used Man Hours		
den 12 oktober 2016	0.00	Task Name	Date Scheduled
Discovered By	Signed By	Weekly Service Router 17	10/18/2016
pm5	EF 🗾	Type of Task	Activity Done
Priority	✓ Started	Weekly Maintenance	
	Expected End Date	Machine Number	Expected End Date
Alarm Code	den 14 oktober 2016 💌	905543.00	▼
	Approval Required Approved	Machine Name	Used Man Hours Estimated Manhours
Technical Group		Router Machine 17	0.00 👥 0.00
Select	Approved By		
	Select		
	I✓ Solved		
	Date Solved	Task Note	Activity Note
	den 17 oktober 2016 💌	A	<u> </u>
	Cause Type		
	Fatigue		
Fault Description	Solution		_
O-ring worn out, needs replacement.	<u> </u>	T	
			Print Save Cancel
_	v		
	Print Save Cancel		

1. Examples of job forms for a fault and an activity

SUMMARY OF WALKTHROUGH A

- Selection of location in the navigation tree filters displayed information to the data that is relevant for the machines located at the selected location and its sub-locations.
- To select a record in main data grid, click once on appropriate row in main data grid.
- To open form where data of the record can be edited, double click on appropriate record in main data grid.
- By double-clicking on a data row displayed in one of the detail panes, user can quickly navigate to that record in other parts of the program.

Walkthrough B - reporting and finishing a machine fault

In PM5, a fault is a job type created when a machine requires maintenance that is unscheduled beforehand and therefore unexpected. In this walkthrough, we'll go through how to report a fault, how to finish it, and which additional functionalities are associated with faults in PM5.

1. In the navigation tree, find and select the location called *Machine Group I*. If necessary, expand the location tree so that all sub-locations of location *Production* are visible and available for selection.

PM 🔸 🗈 🗳 🗰 🖉 🖉) 				
File View Tools	Filter Help	p			
Ocation ₽	Machines Tasks	s Spare Parts S	Suppliers Activities / Faults		
⊡… 🚔 PM5 ⊑ 🚔 Buildings	Machine A	ID Code	Machine Name	Location	Date
Euilding - Main	903982	90	Packing Line	Machine Group I	5/1/2010
	903982.00	90	Packing Line, Component 1	Machine Group I	1/6/2003
E Building - Secondary	903982.01.01	90	Packing Line, Component 2A	Machine Group I	1/6/2003
Boom 101	903982.01.02	90	Packing Machine, Component 2B	Machine Group I	1/6/2003
	903982.02	90	Packing Machine, Component 3	Machine Group I	1/6/2003
Production Line 1 Machine Group I Achine Group I Production Line 2					

- 2. Now select the machine named *Packing Line, Component 2A* by clicking on it.
- 3. In the Detail information pane (below the data grid with machines), select the pane called Faults.
- 4. Press on the button 'New Fault' at the bottom of the screen.

Machines Task	s Spare Parts	Suppliers Activities / Faults								
Machine A	ID Code	Machine Name	Location	Date	Туре	Supplier	Account Number	Price	Stop Group	Active
903982	90	Packing Line	Machine Group I	5/1/2010	Packing Machine	Solar				V
903982.00	90	Packing Line, Component 1	Machine Group I	1/6/2003	Packing Machine	Solar				V
903982.01.01	90	Packing Line, Component 2A	Machine Group I	1/6/2003	Packing Machine	Solar				
903982.01.02	90	Packing Machine, Component 2B	Machine Group I	1/6/2003	Packing Machine	Solar				V
903982.02	90	Packing Machine, Component 3	Machine Group I	1/6/2003	Packing Machine	Solar				•
Page 1 showing 1 Machine located a	to 5 of total 5 t: Production - Produc	ction Line 1 - Machine Group I							Page 1	/1 🕪 🕅
Details Tasks	Activities Spare	Parts Faults Stop Attacl	hments							
Details Tasks Cause	Activities Spare	Parts Faults Stop Attack	hments Solved	Solution						
Details Tasks Cause	Activities Spare	Parts Faults Stop Attack	hments Solved	Solution						
Details Tasks Cause	Activities Spare	Parts Faults Stop Attact	hments	Solution			,			
Details Tasks Cause	Activities Spare	Parts Faults Stop Attact	hments Solved	Solution	1		/			
Details Tasks Cause Consumption, S	Activities Spare	Parts Faults Stop Attact	hments	Solution	1	Į	New Fault	Delete F-	ault	Go To Fault

5. This action will bring up an empty Fault form. As a minimum, you must specify the following:

- * fault type
- * discovery date
- * discovered by
- * who is to sign for it

- Fault type, indicates the character of the reported fault. List of fault types are user defined. New fault types can be added to the system in the Administration module of PM5.

- Discovered by, indicates who is reporting the fault. Currently logged in person is selected by default in new faults.

- Discovery date, indicates the time for when the fault has been reported in PM5. Unless the fault isn't marked as *Started* and *Expected*, *end date* is also specified. The discovery date also indicates when the fault is expected to be resolved.

- To be signed by field, indicates who is responsible for the fault resolution.

- * Select fault type, Part Failure, in the Fault Type.
- * Enter current date in *Discovery Date*.
- * Select user AB in the To Be Signed By field.
- * Tick the box Started.
- * Select *Expected End Date*, two days from current date.

The form should now look something like the picture below. When done with entries, press the *Save* button to save the fault in PM5.

Faults	x
Machine 903982.01.01 Packing Line, Co	mponent 2A Job No
Fault Type Part Failure Discovered (Date) 26. oktober 2016 Discovered By pm5 Priority Alarm Code Technical Group	Estimated Manhours 0 Used Man Hours 0 Used Man Hours 0 To Be Signed By AB V Started Expected End Date 28. oktober 2016 Approved
Select	Approved By Select Solved Date Solved 25. oktober 2016 Y Cause Type Select Y
Fault Description	Solution
	Print Save Cancel

6. When the Save button is pressed, you will be asked if you wish to specify spare part consumption and stop the period associated with the fault that is about to be reported in PM5. For now, don't tick any of the boxes and press the OK button to continue.

ault	Ш
Select from options]
Add spare parts to fault	
Add Stop Period	
Ok	
	Select from options C Add spare parts to fault Add Stop Period Ok

7. Once the fault is saved, it is listed in the *Faults* section for the machine *Packing Line Component 2A.*

Selecting machine and pane faults is a quick way to see what faults have been reported for the specific machine.

Machines T	Machines Tasks Spare Parts Suppliers Activities / Faults											
Machine Number	Δ	ID Code	Machine Name	Location	Date	Туре	Supplier	Account Number				
903982		90	Packing Line	Machine Group I	5/1/2010	Packing Machine	Solar					
903982.00		90	Packing Line, Component 1	Machine Group I	1/6/2003	Packing Machine	Solar					
903982.01.01		90	Packing Line, Component 2A	Machine Group I	1/6/2003	Packing Machine	Solar					
903982.01.02		90	Packing Machine, Component 2B	Machine Group I	1/6/2003	Packing Machine	Solar					
903982.02		90	Packing Machine, Component 3	Machine Group I	1/6/2003	Packing Machine	Solar					
Page 1 showin Machine locat	ng 1 t æd at	o 5 of total 5 :: Production - Produc	ction Line 1 - Machine Group I									
Details Tas	sks	Activities Spare	Parts Faults Stop Attac	hments								
Cause T	Гуре	Date V	Description		Solved	Solution						
Pa	art Fa	ailure 10/26/2016										

8. Now, let's report this newly reported fault as resolved. To do this we need to re-open the Fault form. A fault can be opened directly in the Machine section of PM5 – mark the fault by clicking once on it, then right-click the mouse to open the quick menu and select *Open Fault*.

Machines Tasks	s Spare Parts S	Suppliers Activities / Faults					
Machine 🔬	ID Code	Machine Name	Location	Date	Туре	Supplier	Acc Nur
903982	90	Packing Line	Machine Group I	5/1/2010	Packing Machine	Solar	
903982.00	90	Packing Line, Component 1	Machine Group I	1/6/2003	Packing Machine	Solar	
903982.01.01	90	Packing Line, Component 2A	Machine Group I	1/6/2003	Packing Machine	Solar	
903982.01.02	90	Packing Machine, Component 2B	Machine Group I	1/6/2003	Packing Machine	Solar	
903982.02	90	Packing Machine, Component 3	Machine Group I	1/6/2003	Packing Machine	Solar	
Page 1 showing 1 Machine located a	to 5 of total 5 t: Production - Produc	tion Line 1 - Machine Group I	hments				
	Activities Spare	Paris Paulo Stop Allac	ninents	Columb	Calution		
Cause Type	Date V	Description		Solved	Solution		
Part F	allure 10/26/2016	Show	w All Columns				
		Hide	All Columns				
		Rese	et Columns				
		Ope	n Fault				

However, in this case, double click on the fault row instead. As already demonstrated in previous walkthrough, this action will switch the view to the *Activities/Faults* section and put

focus on the fault that we're interested in. Once you've double-clicked on the fault, the main data grid should look like this.

Machines	Machines Tasks Spare Parts Suppliers Activities / Faults											
Fault	Δ	Task Name // Fault Type	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Date	Priority	Signed By / Solved By	Job No	
		Part Failure	Packing Line,	903982.00	10/12/2016	10/17/2016	0.00			EF	122	
	1	Part Failure	Packing Line,	903982.01.01	10/26/2016		0.00			-????-	124	

9. Double-click on the marked fault to open the Fault form. Once the form is opened, do the following:

- Tick the checkbox labeled *Solved*. This indicates that the fault has been fixed and should be considered as closed.

- Once the *Solved* checkbox is ticked, you also need to specify the date for when the fault has been reported as fixed. Current date is default value, let's leave it like that.

- Finally, select *Fatigue* in the *Cause* field. Selecting a cause is not mandatory, but it is a good practice that provides information about the nature of the fault. List of causes is, just like fault types, user defined and can be modified and added to in Administration module of PM5.

The form should now look like this. Press *Save* to save the updated fault.

Faults	x
Machine 903982.01.01 Packing Line, Con	mponent 2A Job No 124
Fault Type Part Failure Discovered (Date)	Estimated Manhours 0.00 Used Man Hours
26. oktober 2016	0.00
Discovered By pm5	Signed By AB
Priority Alarm Code	Started Expected End Date 28. oktober 2016
Technical Group	Approval Required Approved
Select	Select
	Date Solved 26. oktober 2016
	Cause Type Fatigue
Fault Description	Solution
×	X
	Print Save Cancel

10. Since the status of the fault has changed from *not finished* to *finished*, you will once again be requested if you wish to add spare part consumption and stop times related to the fault that was just finished. This time around tick both check boxes and press OK.

ult 🛛
Select from options
Add spare parts to fault
V Add Stop Period
Ok

11. Since checkbox *Add spare parts to fault* was added, the Spare Part Consumption form is opened. In this form, you can select which spare parts were used to solve the fault.

Our demo database contains initially only five spare parts, so it's easy to find what one is looking for. In real life, hundreds or ever thousands of spare parts can be registered in PM5. To make it easier to find the spare part one is looking for, *Spare part consumption* form is therefore equipped with a search tool.

-Select *Packing* in the *Group* field and press the *Apply Filter* button. Observe how the list of spare parts has now been reduced to only those of type *Packing*.

-Enter *P7* in the field *Name* and press the *Apply Filter* button. Your list of spare parts should now be reduced to a single spare part with the number 5002 and name P5 O-ring.

achine No		Machine Name	
03982.01.01		Packing Line, Comp	onent 2A
Filters		D	
Group	-	Dimension	
Name		Bar Code	
P5			
Spare Part No		Unit	
Type No		_	
			Apply Filter
		-	
aroup	Number	luma No	D mm n
acking	5002	5B (Japanese)	P5 O-ring
Packing	5002	5B (Japanese)	P5 O-ring
Packing	5002	5B (Japanese)	P5 O-ring
acking	5002	5B (Japanese)	P5 O-ring
acking	5002	5B (Japanese)	P5 O-ring
acking	5002	5B (Japanese)	P5O-ring
acking Scheduled Qty.	Store (1 Available)	5B (Japanese)	P5O-ing
acking Scheduled Qty. 0	Store (1 Available)	58 (Japanese)	P5O-ring
Acking Scheduled Qty. Date Consumption Date X V V V V V V V V V V V V V V V V V V	Store (1 Available)	58 (Japanese)	P5O-ring
Scheduled Qty. Date Consumption 26-10-2016	Store (1 Available) Note	5B (Japanese)	P5 O-ring
Scheduled Qty. 0 Date Consumption 26-10-2016 Used By pm5 V	Store (1 Available)	5B (Japanese)	P5 O-ring
Scheduled Qty. Dete Consumption 26-10-2016 Used By pm5 Consumed	Store (1 Available)	5B (Japanese)	P5 O-ring
Acking Scheduled Qty. 0 Date Consumption 26-10-2016 ▼ Used By pm5 ▼ Consumed Consumed Consumed	Store (1 Available)	5B (Japanese)	P5 O-ring
acking Scheduled Qty. 0 Date Consumption 26-10-2016 Pm5 Consumed Consumed Consumed Torsumed Consumed Torsumed Default	Store (1 Available) Note	5B (Japanese)	P5 O-ring
Scheduled Gty. 0 Date Consumption 26-10-2016 Used By pm5 Consumed Consumed Consumed Default	Store (1 Available)	58 (Japanese)	P50-ing

- 12. Select spare part with the number 5002 by clicking on it, if it's not already selected beforehand.
 - Enter 4 in the field *Scheduled Qty*. This is the quantity that was consumed by the fault.

- Tick the checkbox *Consumed* to indicate that the consumption has taken place (as opposed to planned consumption, which may or may not take place at some time in the future).

Notice, that there are no selections in the field Store, but that there is one store available in the list of stores. This means that you have a choice to consume the selected spare part from a specific stock.

Scheduled Qty.	Store (1 Available)
4	Central Store - Room 1 - Shelf A - Box 104
Date Consumption 26-10-2016	Central Store - Room 1 - Shelf A - Box 104
Used By pm5	
Consumed Consume Type Default	
	Save Close

- Select the store shown in the list.

- Finally press *Save* to save the spare part consumption.

13. Next, PM5 will ask if the spare part just used in connection with the fault we're reporting as finished, should also be associated with the machine with the fault. This request is shown whenever spare parts previously unassociated with a machine, are used in jobs related to that machine. Select *Yes* to move forward.



14. You have now added a consumption of four units of spare part P5 O-ring to your fault. If required, you could continue adding additional spare parts, but we need to continue our walkthrough, so please press the button *Close* in the *Spare part consumption* form. 15. Since you've ticked Add Stop Period in step 10, the application now shows the Stop form.

Down-Time Group		
Individual Stoptime		
 Machine Specific 		
Date of Start	Time	
26-10-2016	• 09:00:00	
Date of End	Time	
26-10-2016	▼ 13:00:00	-
Duration		
04:00:00		
Down-time Type		
Medium		-
		10.00

Here, you have the opportunity to specify the time period during which the machine with the fault stood still. If the machine didn't need to be stopped, this step can be bypassed by pressing on the *Cancel* button.

- In this case, the machine had to be stopped for four hours, between 9:00 and 13:00.
- The stoppage was for that machine only, so let's tick the *Machine Specific* checkbox.
- Finally, you need to specify the type of the stop. In the demo database stop types try to define the severity of the individual machine stops, but the user can define his own set of types in the Administration module. For this fault let's select *Medium* on the list of down-time types.

- To save and proceed, press the *Save* button.

16. Congratulations, you have just solved your first fault in PM5. If we look at the data grid in the *Activities/Faults* section, you can see that the fault you've been working on is now marked as solved and has a completion date.

Machi	ies	Tasks	Spare Parts	Suppliers Activitie	es / Faults									
Fault		Δ.	Task Name // Fault Type	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Date	Priority	Signed By / Solved By	Job No	Interval (Days)	Expected End Date
	V		Part Failure	Packing Line,	903982.00	10/12/2016	10/17/2016	0.00			EF	122	0	10/14/2016
			Part Failure	Packing Line, Co	903982.01.01	10/26/2016	10/26/2016	0.00			AB	124	0	10/28/2016

Let's now take a look at the details for the fault. Select the pane *Spare Parts,* it should show a consumption of four units of spare parts numbered 5002.

Machines	Machines Tasks Spare Parts Suppliers Activities / Faults											
Fault	Δ	Task Name // Fault Type	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Date	Priority	Signed By / Solved By	Job No	
v		Part Failure	Packing Line,	903982.00	10/12/2016	10/17/2016	0.00			EF	122	
		Part Failure	Packing Line, Co	903982.01.01	10/26/2016	10/26/2016	0.00			AB	124	
Page 1 sho Machine lo	wing 1 cated a	o 2 of total 2 : Production - Produc	ction Line 1 - Machine	Group I								
Details	Details Spare Parts Stop Attachments External Services											
Number		Type Number	Name	Consumed	Scheduled	Used Qty	Store	User	Group	Note		
5002		5B (Japanese)	P5 O-ring		4	4	Central Store - R	pm5	Packing			

If you double-click on the record of consumption, the application will switch to Spare Parts section and automatically put focus on the spare part that was used in resolution of the fault. Let's try that now – double-click on the spare part consumption record.

Tasks Spare Parts Suppliers Activities / Faults Machines Preferred Spare Part Spare Part Manufacturer Supplier Type Number Name Number Name Product Number CR1225 1001 CR Panasonic CR CR2320 1005 Panasonic P3 O-ring 5001 5B (Japanese) Zycon P5 O-ring 5002 5B (Japanese) Zycon P7O-ring 5003 Zycon 5B (Japanese) Page 1 showing 1 to 5 of total 5 Consumptions Stores Suppliers Details Machines Attachments Spare Part Properties Custom Spare Part Property Spare Part Note Group Name PTFE, solvent resistant • Select Dimension 4,9 x 1,9 Bar Code Unit Cost Price Pcs 17.00 Object in Store

Main data grid section should now look something like this.

Let's go back to the *Activities/Fault* section – to do that click on the Activities/Faults pane above the main data grid.

The fault you've been working on is still in focus – record selection is not affected by user moving over to another section of PM5.

Now, select the *Stop* pane in the *Detail* section. You should see the record of the stop associated with the fault. The record should look something like the one on picture below.

	Machines Task	s Spare Parts	Suppliers Activitie	s / Faults								
	Fault 🛆	Task Name // Fault Type	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Dat	e	Priority	Signed By / Solved By	Job No
	~	Part Failure	Packing Line,	903982.00	10/12/2016	10/17/2016	0.00	Γ			EF	122
		Part Failure	Packing Line, Co	903982.01.01	10/26/2016	10/26/2016	0.00		1		AB	124
	Page 1 showing 1 Machine located a	to 2 of total 2 t: Production - Produ	ction Line 1 - Machine	Group I								
h	Detaile Spare P	Parte Stop At	tachmente Externa	I Services	_	_	_	_	_	_	_	_
ľ	Details Opare I	dito Otop At	achinenta Externa	i ocivioca								
I	Туре	Stop Group		Start Date		End Date	Du	uration	Individual			
	Medium	Individual St	optime	10/26/2016 9:00 A	M.	0/26/2016 1:00 PM	04:	:00:00	~			
Ш												

SUMMARY OF WALKTHROUGH B

- A fault is reported for individual machine by selecting machine and creating new fault for it
- To be able to create new fault, you need to specify:
 - o Discovery date
 - $\circ \quad \text{Who discovered it} \quad$
 - Who is to sign for it
 - What type of fault it is
- To report a fault as started, you need to specify an expected finish date
- To report a fault as solved, you need to specify the date when the fault was finished and who signed for that action
- You can add additional information associated with the fault:
 - o What spare parts were consumed by the fault
 - \circ $\;$ $\;$ From what spare part stock did the consumed spare parts come from $\;$
 - If the machine had to be stopped for the fault to be resolved, how many hours did that take

Walkthrough C – Tasks and activities

An activity is another type of job handled by PM5. Unlike faults, activities in PM5 are defined and scheduled in advance. An activity always belongs to a specific task. A task defines what is to be done and who is to do perform the activity. It also decides scheduled date of the activity.

A task could be regarded as a receipt, a maintenance activity that is to be performed with regular intervals on a specific machine. A task specifies what is to be done, by whom, how often and which spare parts are to be used in activities it controls. Once a task is created and assigned to a machine, it generates its first **activity**.

An activity is generated by the task as soon as that task is saved. The user needs to specify when this first activity is to be performed. Once the first activity is finished, a new activity is created and automatically scheduled according to the information specified in related task.

To summarize – each machine can have one or more tasks associated to it. Each task defines a maintenance job to be done, with regular intervals on the machine it belongs to. Once a task is 'running', it schedules instances for when the maintenance job is to be performed. Each of these instances are called activities in PM5.

Both activities and faults are called **jobs** in PM5.

Now, let's take a closer look at how tasks and activities work in practice.

- 1. Ensure that the location *PM5* is selected on the navigation tree. This way you'll be able to see all data registered in the system
- 2. If it's not already selected, select the section *Machines* in your PM5 client.
- 3. Now find and select the machine named *Packing Line, Component 1*. You can easily find it on a current list by looking at the list of machines. But if you have several hundred machines in your system, finding the one you're looking for, may be more challenging. The *Quick search tool* can be helpful to find a specific machine. You can open the quick search tool in one of two ways.
 - a. In the main menu, on the top of PM5 client, find and click on the icon that looks like a magnifying glass.

	2) Y =						
File View	ools	Filter	Hel	р				
Location		Machines	Task	s Spare Parts	Suppliers	Activities / Faults		
⊡ 🚔 PM5 ⊕ 🚔 Buildings		Machine Number		ID Code	Machine	Name	Location	Date
	-	903982		90	Packing L	ine	Machine Group I	5/1/201
		903982.00		90	Packing L	ine, Component 1	Machine Group I	1/6/200
		903982.01.0	1	90	Packing L	ine, Component 2A	Machine Group I	1/6/200

b. On your keyboard, hold down *Ctrl* key and press down key *Q*.

Either one of these actions will open a quick menu form where you can quickly find the object you are looking for.

Please notice – quick search tool is available in all of the five main sections of PM5. You can use it in Machines, Tasks, Spare Parts, Suppliers and Activities/Faults. 4. Regardless of which method you use in the previous step, you should now have the *Quick Search Tool* for visible on your screen.

Machine Quick Search -			x
Machine No	Machine Name	ID Code	
Machine No	Machine Name	ID Code	•
9856	Loading truck 02	LT02	
905547	Loading truck 01	LT01	
905543.02	Router Machine 17, Component 2	17B	
905543.01	Router Machine 17, Component 1	17A	
905543.00	Router Machine 17	17	
903982.02	Packing Machine, Component 3	90	
903982.01.02	Packing Machine, Component 2B	90	
903982.01.01	Packing Line, Component 2A	90	
903982.00	Packing Line, Component 1	90	-
003087	Darking Line	on	•
Page 1 showing 1 to 10 of total 10		Ok	Cancel

Enter the name of the machine you are looking for in the field labeled *Machine Name*. Observe that as you type in the name, the list of machines in the table below is gradually reduced. Once you've typed *Packing Line, Component*, the list should be reduced to two machines, one of which is *Packing Line, Component* 1.

Machine Quick Search -				X
Machine No	Machine Name	ID Code		
	Packing Line, Component			
Machine No X	Machine Name	ID Code		•
903982.01.01	Packing Line, Component 2A	90		
903982.00	Packing Line, Component 1	90		
				_
				•
Page 1 showing 1 to 2 of total 2			Ok	Cancel

Double-click on *Packing Line, Component 1*. This action will close down the quick search menu. Return to the main data grid, with the list of machines and mark the machine you're looking for.

Machines Task	s Spare Parts	Suppliers Activities / Faults								
Machine 🛆 Number	ID Code	Machine Name	Location	Date	Туре	Supplier	Account Number	Price	Stop Group	Active
903982	90	Packing Line	Machine Group I	5/1/2010	Packing Machine	Solar				~
903982.00	90	Packing Line, Component 1	Machine Group I	1/6/2003	Packing Machine	Solar				
903982.01.01	90	Packing Line, Component 2A	Machine Group I	1/6/2003	Packing Machine	Solar				~
903982.01.02	90	Packing Machine, Component	Machine Group I	1/6/2003	Packing Machine	Solar				~
903982.02	90	Packing Machine, Component 3	Machine Group I	1/6/2003	Packing Machine	Solar				~
905543.00	17	Router Machine 17	Machine Group III	10/6/1994	Router Table	SKF				~
905543.01	17A	Router Machine 17, Componen	Machine Group III	10/6/1994	Router Table	SKF				~
905543.02	17B	Router Machine 17, Componen	Machine Group III	10/6/1994	Router Table	SKF				~
905547	LT01	Loading truck 01	Building - Main	10/6/1994	Electric Loading	ErgoLift				7
9856	LT02	Loading truck 02	Building - Second	7/1/2005	Electric Loading	ErgoLift				V

5. Once the machine *Packing Line, Component 1* is selected, select pane, *Tasks* in the *Details* section. There you'll see that our machine has one task. It's called *Monthly Inspection* and is scheduled to be performed once every 30 days.

Since we need to take a closer look at this task, double-click on it.

	Details	Tasks	Activities	Spare I	Parts	Faults	S	top	Attachments		
	Name				Interv	al (Days)		Inter	val (Units)	Active	Estimated Man Hours
	Monthly In	spection			30			0			0
l											

6. The application has now switched the view to *Tasks* section. Two tasks are shown in the main data grid. The task we are interested in is marked.

Location #	Machines <mark>Tasks</mark> Sp	are Parts Suppliers	Activities / Faults					
E··· PM5	Task Name 🔺	Task Type	Machine Name	Signed By	Technical Group	Machine No	Active	
Building - Main	Monthly Inspection	Monthly Maintenance	Packing Line, Component 1	Andy Brown		903982.00		
Hall B	Weekly Service Router 17	Weekly Maintenance	Router Machine 17	Andy Brown		905543.00		
Building - Secondary Room 101 Room 102 Production Line 1 Machine Group I Production Line 2 Machine Group II Machine Group IV								

7. Double-click on the task that is marked in *Tasks* main data grid. This action will bring up the *Task* form, containing definition of the task we're working on.

Task		×
Task Task Name Monthly Inspection Active Machine Packing Line, Component 1 Type of Task Monthly Maintenance To Be Signed By AB Technical Group Select Priority 1 Estimated Manhours 0.00	Interval Cocked Days 30 Approval Required Task Note	X
Created by pm5 on 10/27/2016 10:13:02 AM.	Save	Cancel

A task is defined with following data:

- Task name user defined name for each individual task
- Machine- what machine it belongs to
- Type of Task is selected from a list. This list is user defined according to the needs of the company. New task types can be added at any time.
- To be signed by who is responsible for completion of activities that are generated by the

task.

- Days the frequency which the task is to be performed.
- There are some additional fields in this form, but let's ignore them for now.
- 8. Press on the *Cancel* button to close the form.
- 9. With our task still selected in main data grid, now select the pane *Activities* in the *Details* section.

Details	Activities	Spare Parts	Calibration Attach	ments External S	ervices	
Date		Done	Done Date	Signed By	Used Man Hours	Note
10/27/20	16				0	

Here, you can see the list of **activities** created by the task. Activities are the actual maintenance jobs that are scheduled and need to be performed by the maintenance personnel.

Here, we can see that only one activity has been scheduled by the selected task and that it's not yet completed. Let's finish it now.

Double-click on the activity on the list, to navigate to it in the *Activities/Faults* section, where it can be finished.

10.

11. The picture below shows the list of jobs currently registered in the system.

Machines	Tasks	Spare Parts	Suppliers	Activitie	es / Faults						
Fault	Δ	Task Name // Fault Type	Machine Name		Machine No	Date	Done Date	Estimated	Fixed Date	Priority	Signed By / Solved By
		Weekly Service	Router Mad	hine 17	905543.00	10/3/2016	10/3/2016	0.00			pm5
		Weekly Service	Router Mac	hine 17	905543.00	10/10/2016	10/11/2016	0.00			pm5
		Weekly Servi	Router Ma	achi	905543.00	10/18/2016		0.00			-????-
		Monthly Inspe	Packing L	ine,	903982.00	10/27/2016		0.00		1	-?????-
		Part Failure	Packing L	ine,	903982.00	10/12/2016	10/17/2016	0.00			EF
		Electric	Loading tr	uck	905547	10/24/2016		0.00			-777??-
		Part Failure	Packing Lin	e, Co	903982.01.01	10/26/2016	10/26/2016	0.00			AB

Take a moment and study the information in this data grid. Each row represents an individual job. Checkbox in the column *Fault*, indicates whether the job is an activity (planned job) or a fault (unplanned job). Column *Date*, shows the date on which an activity has been scheduled **or** when a fault has been discovered. If a job has been started, but is yet to be finished, there is a date in column *Expected End Date*. If a job is done, checkbox in column *Done* is ticked, and there is a date indicating completion date in column *Done Date*.

If the *Date* is shown in red, this indicates that the job is not completed in the expected time.

Content of this list may look a little different on your screen. Most of the unfinished jobs in your list are shown in red. Let's not worry about that, the important thing is that the activity we want to finish is in focus.

12. Double-click on the marked activity. This will open the Activity form, where we can report our activity as finished.

Activities	×
Signed By Select	Job No Priority 125 1
To Be Signed By AB	Done Started Fixed Date
Task Name Monthly Inspection Type of Task Monthly Maintenance Machine Number 903982.00 Machine Name Packing Line, Component 1	Date Scheduled 10/27/2016 Activity Done Expected End Date Used Man Hours Estimated Manhours 0.00
Task Note	Activity Note
	Print Save Cancel

To finish an activity, we first need to specify who is finishing it. This is done by selecting one of the users listed in list *Signed by*.

Next, mark checkbox *Done*. This action will activate field *Activity Done* and put in current date as date of completion for our activity. This date can be changed if needed – you need to press on the down arrow shown in the right edge of the *Activity Done* field and select the date you wish to use in date picker shown on the screen. For this activity however, let's keep current date unchanged.

Once the necessary data has been entered, press on *Save* button to report finish of activity. 13. PM5 will now ask you if you want to add any spare parts to the activity.



By now you should be familiar with this procedure – if you press *Yes*, you will be able to select one or more spare parts, specify used quantity and commit their consumption to the system as part of completion process of this activity. This time however, let's press on *No* button to bypass this step and move forward in our walkthrough.

14. In next (and final) step, PM5 will suggest to you the date on which to schedule next instance of the activity you just finished. The suggested date will be 30 days from current date, because that's the frequency that was specified in the task to which the activity belongs.

November November 1016 101								
	s	М	т	W	т	F	S	
45	30	31	1	2	3	4	5	
46	6	7	8	9	10	11	12	
47	13	14	15	16	17	18	19	
48	20	21	22	23	24	25	26	
49	27	28	29	30	1	2	3	
50	- 4	5	6	7	8	9	10	
F	ixed	Date	е					

You can change the suggested date to a different day. For example if suggested date is a Saturday, like in the example above, perhaps it would be better to move it to Monday of following week. In our walkthrough, let's stick with whatever date was suggested by PM5.

Press OK button to proceed.

15. You have now finished an activity and PM5 has created new activity, scheduled 30 days from current date.

Fault 🗠	Task Name // Fault Type	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Date	Priority	Signed By / Solved By	Job No
	Weekly Service Router 17	Router Machine 17	905543.00	10/3/2016	10/3/2016	0.00			pm5	119
	Weekly Service Router 17	Router Machine 17	905543.00	10/10/2016	10/11/2016	0.00			pm5	120
	Weekly Service Router 17	Router Machine 17	905543.00	10/18/2016		0.00			-????-	121
	Monthly Inspection	Packing Line, Component 1	903982.00	10/27/2016	10/27/2016	0.00		1	pm5	125
	Monthly Inspection	Packing Line, Component 1	903982.00	11/26/2016		0.00		1	-?????-	126
v.	Part Failure	Packing Line, Component 1	903982.00	10/12/2016	10/17/2016	0.00			EF	122
V	Electric	Loading truck 01	905547	10/24/2016		0.00			-77777-	123
V	Part Failure	Packing Line, Component 2A	903982.01.01	10/26/2016	10/26/2016	0.00			AB	124

The activity you've closed now displays current date in *Done Date* column. New activity with same name is also displayed, scheduled 30 days from current date.

SUMMARY OF WALKTHROUGH C

- Maintenance jobs that are to be performed regularly over a certain period of time are specified in **tasks**.
- A single task specifies a single job for a specific machine. Task defines what is supposed to be done, who is to do it and how often the job is to be done.
- An instance of the job is scheduled for a specific date as an activity.
- When an activity is finished, new activity of same type is automatically scheduled in PM5. Scheduled date for new activity is decided based on frequency in days specified in the task that controls the activity.

Walkthrough D – Administration module

Configuration and administration functionality of PM5 is located in a so called administration module. Normally, due to the nature of functions that are contained in it, access to administration module is restricted to users who have a management role in PM5.

In this walkthrough we will go through the most common tasks that are done in the Administration module:

- Creation of new user
- Assignment of new user to a user group
- Working with locations
- 1. To access the Administration module, click on menu item *Tools* and select *Administration*.



2. The Administration module will be displayed on the screen.

PCSYS Maintenance 5 - pm5			IX						
File Action Help									
G Ð 🙆 🗃 🔒									
😑 📄 System Tools	Name	Description							
Sers Users	Administrative personnel								
28 User Groups	Maintenance personnel								
F Technical Groups	Purchase personnel								
Locations	Spare part store personnel								
🎦 Custom Field Groups									
M Input Masks									
Notice Boards									
- 💭 Man Hour Price									
Configurations									
Languages									
P Options									
- I Translations									
Barcode Label									
Support									
😑 🛄 System Variables									
+ E Client									
+ 🧰 Purchasing									
+ 🧰 OPC									
+ E Postal Information									

The Administration module consists of two sections:

• Left section lists functions and features of the administrative module. To access and use one of these functions, you need to select it by clicking on it with your mouse. Some of the functions consist of several sub-functions. This is indicated by + icon to the left of the function. To access all functions, click on the + icon.

Find the function *Client* and click on the + icon. This action will expand *Client* and reveal underlying functions. They can also be expanded by clicking on the + icon beside them.



• Once a function has been selected, the right section of the Administrative module will display data related to that specific function. To edit settings or data, you need to double-click anywhere in the right section of Administrative module.

Find the function *Options* in the left section of the Administrative module. Next move the mouse to the right section of the Administrative module, and double-click anywhere on it. This action will open a form allowing you to edit global options of PM5. This is also where you have to enter your license information after the purchase of PM5.

Options	_		
Registration		Logo	
License Holder			
Demo			
License Code			
6KC4N 80BNL 000F9	BD8GJ		
Attachment Folder			
		Browse	For File
Browse	For Folder	CI	ear
Max Notice Board Notes:	0		
	20		
Timeout (in minutes)	30		
Login Timeout	lo		
Minimum Auto-Update (In minut	es)		
Root Location Text			
Auto machine numbering			
Report Header			

Press the *Cancel* button to close the *Options* form.

3. Let's create a new PM5 user. Select the function *Users*. The Administrative module should look like this.

- System Tools	User ID	First Name	Last Name	Description	Logged In	Passive
1 Users	AB	Andy	Brown			
	CD	Charlie	Donovan			
	EF	Eddie	Fletcher			
Technical Groups	pm5	pm5	pm5			
Locations						
Custom Field Groups						
M Input Masks						
- 🧭 Notice Boards						
🗊 Man Hour Price						

In the right section of the administrative module you can now see all users registered in the system. Since you're logged in as user *pm5*, that user's *Logged In* checkbox is checked in. To edit an already existing user, double click on user's record.

4. We will now add the new user to the system. Move the mouse pointer to the right section of the Administrative module and click on the right mouse button. In the quick menu that is displayed on the screen, select *New*.



- 5. An empty user form will now appear on the screen. Following data **must** be entered for a new user to be able to save his record in PM5:
 - User Id
- 6. First name
 - Last name
 - Password password used when logging in to PM5
 - Confirm Password repeat password
 - Language one of default languages needs to be selected

💻 User	×
User ID	GH
First Name	George
Last Name	Hansen
Description	Technician
E-Mail	gh@email.com
Mobile Number	555 666 777
Password	
Confirm Password	•••
Default Language	English - United States
Auto-Update (In minu	utes) 10
Lock Approval	Allowed to state stock change reasons
Passive	Always Access
Login Privilege	
	Ok Cancel

be returned to the Administration module.

Remaining fields are optional.

Please type in the data provided in picture to the left, in User form displayed on your screen. If it's not already ticked in, please tick in the check box 'Login Privilege'.

For password for this new user, use *pm5*.

When ready, press the *OK* button to save the new user. The User form will close and you will

7. Once a new user is created and saved, he needs to be added to at least one User Group. Find the user you've created (one with initials GH) and double-click on that user's record. The User Properties form that is now displayed on the screen looks a bit different than the one used for creation of new users in previous step.

	PCSYS Maintenance 5 - pm5							_ 🗆 ×	
	File Action Help								User Properties
	i 🖸 🗈 🙆 🖀 😕								
	- 🧾 System Tools	_	User ID	First Name	Last Name	Description	Logged In	Passive	General Member Of
	S Users		AB	Andy	Brown				
	User Groups		CD	Charlie	Donovan				🦰 User ID: GH
	Sector Technical Groups		EF	Eddie	Fletcher				
			GH	George	Hansen				
			pm5	pm5	pm5		∠		
	M Input Masks								Full Name George Hansen
—									_ Description
	Reduce Doards								E-Mail 1
	Backup Database								Mobile Number
ach	Man Hour Price								Default Language English Lipited States
	Configurations								English - United States
									L Passive
	Options								I Login Privilege
Note	Translations								Always Access
	Barcode Label								Allowed to state stock change reasons
	Support								Lock Approval
	😑 🔲 System Variables								
	- Client	-	1						Change Password
_	+ E Faults								
	+ Machines								
	+ Spare Parts								Ok Cancel
	+ 🗖 Suppliers	-							

8. In the *User Properties,* click on the tab called *Member of.* In this section you can assign user to different *User Groups* and *Technical Groups.* In this walkthrough we will assign a user to a single *User Group.*

🕎 User Properties	×
General Member Of	
User Group Technical Group	
Add Remove	
Ok Cancel	

Press the 'Add' button to show list of *User Groups* in the system.

Ļ	Add User Group	×					
	User Groups						
	Administrative personnel						
	Maintenance personnel						
	Purchase personnel						
	Spare part store personnel						
	Ok Cancel						

Select *Maintenance personnel* and press the *OK* button. You have now assigned user GH as member of the user group *Maintenance personnel*.

- 9. Press on the *OK* button in the *User properties* form to close it. You should now be back in the Administrative module.
- 10. Right, so you have now added a user to a user group. But what does that exactly mean? It is actually quite simple. What an individual user is allowed to do and which machines he can access in PM5, is decided by user credentials of the user group to which he belongs. Since we have added user GH to user group *Maintenance personnel*, his privileges and access credentials are controlled by what is allowed for the specific user group.
- 11. Let's have a look at user group *Maintenance personnel*. In the left section of the administration module, click on the function *User Groups*. In the right section of the administration module, you'll see a list of all user groups currently defined in the system.
- 12. Double-click on the user group *Maintenance personnel*. As a result, the Form *User Group Properties* for that user group will be displayed on the screen. It has three tabs: *General* shows the list of users that belong to this group. Here, you can add and remove PM5 users to the group.

- *Privileges* – here you can define user credentials for the members of the group. For further information about individual user credentials, please refer to the User Manual.

- *Locations* – here you can define which locations are accessible to the members of the group. Since every machine must at all times be placed on a specific location, this section effectively controls which machines members of the group are allowed to access and work with.

- *Tabs* – here you can specify which parts of PM5 client are accessible for members of the group.

Let's have a closer look at *Locations*.



The tree displayed in this section is exactly the same as the one displayed in navigation tree of the client. And, just as in the navigation tree, you can expand the location structure by either pressing on plus icons shown beside locations that have more locations at lower levels. Please expand the navigation tree, so that it is completely expanded and looks like this.



As you can see, there is a tick box beside every location. A location (and the machines at that location) are accessible to the member of the group only if the tick box is ticked.

At the moment, the user group *Maintenance Personnel* has no locations ticked, which means that the members of this group do not have access to any locations in PM5.

Tick the following locations:

- Production Line 2
- Machine Group III
- Machine Group IV

Notice – to be able to tick a location checkbox, you first need to mark the location.

When done, press the *OK* button to close down the *User Group Properties* form, close down the Administration module and PM5 client.

13. Launch PM5 client again, but this time log in with the new user. Enter *GH* as user name and *pm5* as password. Since user *GH* belongs to the user group *Maintenance Personnel*, his access to locations, machines and jobs, are automatically limited by the fact of the three locations you've just marked. So the navigation tree and machine list in the main data grid in the *Machines* section now looks like this.

Occation ₽	Machines Tasks	s Spare Parts S	Suppliers Activitie	es / Faults				
E E PM5 E E Production	Machine Number	ID Code	Machine Name	Location	Date	Туре	Supplier	Account Number
Production Line 2 Machine Group III	905543.00	17	Router Machine 17	Machine Group III	10/6/1994	Router Table	SKF	
Machine Group IV	905543.01	17A	Router Machine	Machine Group III	10/6/1994	Router Table	SKF	
_	905543.02	17B	Router Machine	Machine Group III	10/6/1994	Router Table	SKF	

As can be seen by this example, PM5 allows complete control of access to machines, depending on needs of your enterprise.

14. Let's now open the Administration module once again and create a new location in the system.

Select *Tools* in menu bar on top of PM5 client and select *Administration*.

15. Once the Administration module is opened, find and select the function *Locations* in the left section. You should see something like this.

🖃 🧰 System Tools		Location	Store	Inherited Stores
Users	>	🖃 🚔 PM5		
Stars Groups		🔁 📾 Buildings	Central Store;	
Joser Gloups		🕂 📄 Production	Central Store;	
Technical Groups				
- Locations	L .			
Custom Field Groups	L			

16. The navigation tree in the right section of the navigation module is collapsed, so let's expand it. As on previous occasions, click on all + icons until all locations are visible. Alternatively, you can select location *PM5* and click on the right mouse button to open the quick menu. Then, select *Expand all*. This action will expand the navigation tree.

	Location		Store		Inherited Stores
>	⊡·🚞 PM5				
	🕀 📄 Buildings	New		e;	
	🕀 📄 Production	Сору		e;	
	Paste		:		
		Delet			
		Prope			
	Expar		nd all		
		Colla	ose all		
		Help			

After expansion, the navigation tree should look like this.

	Location	Store	Inherited Stores
>	□·		
	🖨 🚞 Buildings	Central Store;	
	🖃 🚞 Building - Main		Central Store;
	📄 Hall A		Central Store;
	Hall B		Central Store;
	😑 🚞 Building - Secondary		Central Store;
	📄 Room 101		Central Store;
	Room 102		Central Store;
	🖃 📄 Production	Central Store;	
	🖃 📄 Production Line 1	Local Store - Production Line 1;	Central Store;
	··· 📄 Machine Group I		Local Store - Production Line 1;Cen
	Machine Group II		Local Store - Production Line 1;Cen
	🖃 📄 Production Line 2	Local Store - Production Line 2;	Central Store;
	📄 Machine Group III		Local Store - Production Line 2;Cen
	🦢 📄 Machine Group IV		Local Store - Production Line 2;Cen

17. Let's add a new location to the system. We will add a location called Workshop, directly under top location *PM5*.

Select location PM5 and click on the right mouse button to open quick menu. In it, select *New*.

	Location	Store		Inherited Stores
>	⊡·🚘 PM5			
	🖃 🚞 Buildings	New		
	🚍 🚞 Building - Main	Сору		Central Store;
	📄 Hall A	Paste		Central Store;
	Hall B	Delete		Central Store;
	😑 🥁 Building - Secondary	Descrites		Central Store;
	📄 Room 101	Properties	-	Central Store;
	Room 102	Expand all		Central Store;
	🖃 📄 Production	Collapse all		
	📄 🚞 Production Line 1		tion Line 1;	Central Store;
	📄 Machine Group I	Help		Local Store - Production Line 1;Cen

18. A Form for creation of new location will appear on the screen. Enter the location's name in the field *Location* and press OK to save it in the system.

Location			×
Location	Workshop		
Туре	Location		•
Property Group	???		•
Name		Value	
		Ok	Cancel

19. You will now be presented with a warning that may seem a bit strange. It has to do with one of the business rules of PM5, which says that if a new location is created directly under location *PM5*, then the administrator must manually define which user groups are to have access to it. New locations that are created at 'lower' levels in the navigation tree will always inherit their availability from their parent location.



Press the OK button to continue.



20. The Navigation tree has now a new location named Workshop.

21. Close down the Administration module. Once you're back in PM5 client, move your mouse to an empty area in the *Navigation tree* section and click on the right mouse button to open the quick menu. Select *Refresh*. This command refreshes and displays the 'latest version' of data on the screen.





22. After refresh, the navigation tree will be displayed in its collapsed format. Expand it to see all locations. As you can see, the new location *Workshop* is **not** displayed in the tree.

23. Open the Administration module and select the function

User Groups.

- 24. Find user group Maintenance Personnel and open its properties form by double-clicking on it.
- 25. In the user group properties form, select pane *Locations*. It should look like in the picture below. Notice that the new location *Workshop* is not yet ticked.

26. Select the location *Workshop* and tick the tickbox beside it. This action makes the new location accessible to the user group *Maintenance Personnel*. **Observe that if the location Workshop was created 'below' a location that was already accessible by the user group, then the location Workshop would also be accessible by default**.

Ē	Jser Group Properties
(eneral Privileges Locations Tabs
	Er T PM5

- 27. Press the *OK* button to close down the User Group Properties form and close down the Administration module.
- 28. When you're back in PM5 client, repeat action in step 20 of this walkthrough. After refresh of data, your navigation tree should now look like this. Congratulations, you have added a new location to PM5.

🕗 Location 🛛 🖓	Machines	Task
	Machine Number	Δ
🚔 Workshop	905543.00	
	905543.01	
	905543.02	

Observe – the location Workshop is at the moment only accessible to the user group Maintenance Personnel. If you wish, you may now close down PM5 client and login with user pm5 (password pm5). User pm5 belongs to user group Administrators – location Workshop is at the moment not accessible to that user group and will therefore not be shown in location tree for user pm5.

To make location Workshop available for user group Administrators, repeat steps 22-26 for that user group.

SUMMARY OF WALKTHROUGH D

- Administration module is the part of PM5 where all administrative and program configuration functions are located.
- Administration module should be available only to those users who need access to it usually system administrators and managers.
- New PM5 users are created in Users section and are without access credentials to data in PM5 until they're assigned to at least one user group.
- A User Group defines access rights and user privileges of PM5 users who are members of that user group.
- New locations are created in the administrative module.
- If a new location is created directly under top location called *PM5*, user needs to manually specify which user groups are to have access to it. In every other case, a new location inherits access definitions from its parent location.

Walkthrough E - adding new data to PM5

Addition of new machines and creation of scheduled maintenance jobs are two of the most common operations users will be doing in PM5. This final walkthrough will demonstrate how it is done.

- 1. Login on PM5 as the user *GH* you have created in previous walkthrough.
- 2. Select location *Workshop* and if it is not already selected, select section *Machines*. PM5 should like this:

🚗 🗄 🌒 🗳 🎽 🔎 🛯 🎕 🌾 🕫														
	File View Tools Filter Help													
Location 4	Machines Tasks Spare Par	rts Suppliers Activities / Faul	s											
	Machine Number ID Code	Machine Locatio	n Date	Type S	Supplier	Account Number	Price	Stop Group	Active					
ti ⊆ Production L ⊇ Workshop														
	No records match your oriteria.													
	Details Tasks Activities	Spare Parts Eaults Stop	Attachments											
	Polana Taska Acaviaca	Details Tasks Activities Spare Parts Faultis Stop Attachments												
	Machine Properties		Custom Machine Prop	perties										
	Capacity Cap	Power Use Measured Value Units Per Day	Group Name Select											

- 3. To create new a machine, you can:
 - 1. Click on File in menu bar on the top of PM5 and select New



2. Or move mouse to Machine main data grid, click on mouse right button and select *New*.

Machines	Tasks	Spare Parts	Suppliers	Activities	/ Faults
Machine Number		D Code	Machine Name	1	Location
	Nev	N			1
	Cre	ate Copy			
	Cop	oy cell value			
	Edit	t			
	Del	ete			
	Sea	rch	С	trl+Q	
	Ado	to Filter			
	Hel	р			
	Pro	perties			
	Sho	w All Columns			
	Hid	e All Columns			
	Res	et Columns			
	Mac	chine report (Su	upplier/Spare P	'art)	
	Ava	ailability, month			
	Ava	ailability, year			

Select whichever option you wish to open an empty Machine form.

4. We will be adding a MAG/MIG welder machine, produced by Migatronic. Let's take a quick look at those system variables in Machine form, as shown below. Relevant fields are *Type* and *Manufacturer*.

Machine	x
Machine Number	Supplier
Active	Select
ID Code	Manufacturer
	Select
Machine Name	Select
	Caterpillar
Location	Hoerbiger LG
Workshop	Panasonic
Date	Zycon
10/28/2016	
Туре	Power
Select	
Select Diesel Van	Stop Group
Electric Loading Truck	Select
Router Table	Use Measured Value
	Measured Parameter
	Select
	Unit Units Per Day
	Save Cancel

- 5. Both machine type and manufacturer is missing, so we need to add them to the system before we can register a new machine. Press *Cancel* to abort entry of new machine.
- Open the Administration Module and in its left section, find section called System Variables. Below it, find section called Client and press on + icon beside it.

- Once this section is expanded, find a section called Machines and expand it by pressing on + icon.

- From the list of functions that appear, select called *Types*. When this is done, a list of machine types currently defined in PM5 will be displayed in right section of the administration module.



- 6. To add new machine type to the system, move mouse button to the right section of administration module, right click on the mouse and select *New* from quick menu.
- 7. Type in *MIG/MAG Welder* in field *Name* of *Machine Type* form and press the *OK* button to save new machine type.

8. Next expand section Spare Parts in left section of the administration module by clicking on + icon beside it and select *Manufacturers* from the list that is presented on the screen.



- 9. To add new a manufacturer to the system, move mouse button to the right section of the administration module, right click on the mouse and select *New* from the quick menu.
- 10. Type in Migatronic in field *Name* of *Machine Type* form and press the *OK* button to add the manufacturer to PM5.
- 11. Close the administration module and return to PM5 client. Once there, open form for registration of a new machine (described in step 3).
- 12. Enter the new machine data. If you wish to, you can copy data from example picture below or you can try to enter your own data. Once you're done, press the *Save* button to save the new machine in PM5.

Machine Number Supplier	
1001 🔽 Active Solar	•
ID Code Manufact	turer
MIG/MAG Migatroni	ic 💌
Machine Name Account	Number
MIG/MAG welder machine Select	
Location Price	
Workshop 17500	
Date Capacity	
10/28/2016	
Type Power	
MIG/MAG Welder	
Machine Note Stop Grou	up
Select	•
Use N	Measured Value
Measured	d Parameter
Select	V
Unit	Units Per Day
	Save Cancel

13. Congratulations, you have just added the first machine to location Workshop. Now let's add a new task to it.

- 14. If it's not already in focus, click once on the record of your welder in Machines data grid.
- 15. Select *Tasks* in *Detail* section. Your screen should look like this.

DM)	<mark>;;</mark>].	• 1 📰 🗧) 🕎 🕫				PCSY	5 Mainte	enance 5 - Log	ged In: GH - Li	censee:	Demo		_ = ×
-	File V	/iew	Tools	Filter	Hel	р									
Location			Ф	Machines	Task	s Spare Pa	rts S	Guppliers	Activitie	es / Faults					
E (⊆ PM	15 Production			Machine Number	Α	ID Code		Machine Name		Location	Date		Туре	Supplier	Account Number
i	Workshop	1		1001		MIG/MAG		MIG/MAG	welder	Workshop	10/28/201	16	MIG/MAG Welder	Solar	
				1											Þ
				Page 1 sł Machine	nowing 1 located a	to 1 of total 1 t: Workshop						(Page 🛛	1 /1 (
				Details	Tasks	Activities	Spare	Parts F	aults	Stop Attachn	nents				
				Name				Interval (Days)	Interval (Units) Active		Estimated Man Ho	urs	
										New	Task	D)elete Task	Go To Tas	ik
V Filter															

- 16. In *Tasks* pane, click the button *New Task* to open form for creation of a new task.
- 17. Enter data in the form, as shown in picture below. Since the task is to be performed once every three months, you want for this task to be performed once every 90 days.

ask		2
Task Name 90 davs maintenance service V Active	Interval	
Machine	Days	
MIG/MAG welder machine	90	
Type of Task		
Quarterly Maintenance		
To Be Signed By		
GH	Approval Required	
Technical Group Select	Task Note	
Priority 2	Í	1
Estimated Manhours D		2
	Save Cancel	_

- 18. Press the *Save* button to save the new task.
- 19. In same manner as when you created new fault, you will now be asked if you want to add any spare parts to the task. Select *Yes* as answer.

When a spare part is added to a task, then the consumption specified in the task is also added to each activity that belongs to this task. Remember that a task is a template for a regularly recurring maintenance job, while an activity is a single instance for when this job is performed. Thus the actual spare part consumption takes place when activities (and faults) are worked on. 20. In the spare part selection form that now opens, select the battery named CR2350 and enter 2 as quantity. Leave remaining fields unfilled.

By this action, you're saying that each time a quarterly maintenance is performed on that welder, you **expect** for two batteries of above-mentioned type to be used as part of it. Specifying expected spare part consumption in association with regular maintenance tasks have several advantages. First and foremost, it makes handling of individual activities easier for personnel. Secondly, it allows an estimation of expected consumption of spare parts and levels of spare part stocks that should be kept in store.

- 21. Press 'OK' to save scheduled consumption of batteries.
- 22. PM5 will now ask you if you wish to add the spare part to the machine. Select *Yes* to continue.

This is the second time you're asked this question, but what does it mean. Basically, every time a spare part is added to an activity, fault or task **and** that spare part is not present in spare part list of a machine to which the job or task belongs, you will be asked this question. If you say yes, the spare part is automatically associated with the machine. In this way, you will be progressively building spare part lists for each machine as an integral part of the process of handling the maintenance jobs. Of course, you can always say *No* when suitable and just continue with your work.

23. Press on the *Close* button in *Spare Part Association* form to finish association of spare parts with the task.

Ocation ₽	Machines Tasks	Spare Parts	Suppliers A	Activities / Faults					
PM5	Task Name	Task Typ	e	Machine Name	Signed By	Technical Group	Machine No	Active	
🚞 Workshop	90 days maintenance	service Quarterly I	Maintenance	MIG/MAG welder machine	e George Hansen		1001		
	Weekly Service Route	er 17 Weekly M	aintenance F	Router Machine 17	Andy Brown		905543.00		
	Page 1 showing 1 to Machine located at: Details Activities	2 of total 2 Workshop	Calibration	Attachments Externa	Page 1 /1)				
		T N I							
	Number	Type Number	Name	Group	Quantity	Note	Store		
	1005	CR	CR2320	Battery	2				
	Consumption, Sp	are Part			Associate Spare Part	Edit Asso	ociation R	emove Association	

We have now added a new task to our machine. Your PM5 should now look like this:

- 24. Please notice the buttons at the bottom of the *Spare Parts* pane in the *Details* section. *Associate Spare Part* allows you to specify new spare part consumptions for the task after it has been created. *Edit association* opens selected spare part consumption for editing. *Remove association* deletes selected spare part consumption from the task **and** the unfinished activity. **Please notice that any spare part consumption done prior to the time of this deletion are still kept in the system.**
- 25. Let's now have a look at the activity which was created at the same time as our task. While still in *Tasks* section of PM5 and with our task selected, switch to *Activities sub-pane*. Double-click on the single activity that is shown there:



- 26. Navigate to the activity in *Activities/Faults* by either double-clicking on the selected activity or pressing the button *Go To Activity*.
- 27. If it's not already selected, switch to Spare Parts sub-pane for our activity.

Location #	Machines Tas	ks Spare Parts Sup	opliers Act	ivities / Faults										
	Fault	Task Name // Fault T	/pe	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Date	Priority				
Workshop		Weekly Service Router	17	Router Machine 17	905543.00	10/3/2016	10/3/2016 0.00							
		Weekly Service Router	17	Router Machine 17	905543.00	10/10/2016	10/11/2016 0.00	0.00						
		Weekly Service Ro	uter 17	Router Machine 17	905543.00	10/18/2016		0.00						
		90 days maintenand	ce service	MIG/MAG welder machi	ine 1001	10/28/2016		0.00		2				
	•													
	Page 1 showing Machine located	Page 1 showing 1 to 4 of total 4 Machine located at: Workshop												
	Details Spare	Parts Calibration /	Attachments	Task - Attachments E	ixternal Services									
	Number	Type Number	Name	Consumed	Scheduled	Used Qty Sto	ore Us	er Gro	up No	e				
1005 CR CR					2 (D		Batt	ery					
							_		_					
Associate Spare Part Edit Association Remove Association														

- 28. Here you can see the scheduled consumption of two units of spare part CR2320 in *Scheduled* column. The actual consumption of spare part is shown in *Used Qty* column, at the moment it is 0.
- 29. Here's a couple of things that are important to remember regarding spare part consumption:
- 30. You can enter and edit value in the *Used* Qty field at any time, also before and after a job has been completed.
- 31. You can add spare part consumptions directly to an **activity**. However, such consumption will not be 'copied' in activities that will follow. Only spare part consumptions that are defined for the task are 'copied' in each activity based on that task.
- 32. If the value in the *Used Qty* column is 0 for **all** spare part consumptions specified for an activity or fault, then this value is automatically changed to that in *Scheduled* column when activity/fault is finished. Otherwise, the value in *Used Qty* column is unchanged and any spare part consumptions needs to be entered manually by the user.
- 33. Add additional spare part consumption to the activity 90 days maintenance service. Ensure that the activity is selected and press the button Associated spare part to open the Spare Part Association form. Once there, find the spare part named P7 O-ring and add consumption of one unit to the activity. Press the Save button to create the planned consumption.

D PMO											
ia- (≦a) Production └─ (≦a) Workshop	Fault	Task Name // Fault 1	Type I	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Date	Priority	
		Weekly Service Route	er 17 F	Router Machine 17	905543.00	10/3/2016	10/3/2016	0.00			
		Weekly Service Route	er 17 F	Router Machine 17	905543.00	10/10/2016	10/11/2016	0.00			
		Weekly Service R	outer 17 F	Router Machine 17	905543.00	10/18/2016		0.00			
		90 days maintenar	nce service	MIG/MAG welder machine	1001	10/28/2016		0.00		2	
	•										
	Page 1 showing	Page 1 showing 1 to 4 of total 4									
		Machine located at: Workshop									
	Machine locate	d at: Workshop							, ruge la	11 00	
	Machine locate	d at: Workshop	Attacharate	Task Attackments Foto					/ tage je		
	Machine located	d at: Workshop e Parts Calibration	Attachments	Task - Attachments Exte	rnal Services				, age]		
	Machine located Details Spare Number	d at: Workshop e Parts Calibration Type Number	Attachments Name	Task - Attachments Exte	mal Services	Used Qty S	ore	User	aroup	Note	
	Machine located Details Spar Number 1005	d at: Workshop e Parts Calibration Type Number CR	Attachments Name CR2320	Task - Attachments Exter Consumed Sch 2	rnal Services neduled 0	Used Qty S	ore	User C	aroup atteny	Note	
	Machine locater Details Spar Number 1005 5003	d at: Workshop e Parts Calibration Type Number CR 5B (Japanese)	Attachments Name CR2320 P7 O-ring	Task - Attachments Exte Consumed Sch 2 1	rnal Services	Used Qty S	ore	User C B GH P	aroup atteny acking	Note	
	Machine located Details Spare Number 1005 5003	d at: Workshop e Parts Calibration Type Number CR 5B (Japanese)	Attachments Name CR2320 P7 O-ring	Task - Attachments Exter Consumed Sch 2 1	rnal Services neduled [0 0	Jsed Qty S	ore	User C B GH P	acking	Note	
	Machine located Details Spare Number 1005 5003	d at: Workshop e Parts Calibration Type Number CR 5B (Japanese)	Attachments Name CR2320 P7 O-ring	Task - Attachments Exte	rnal Services neduled d 0 0	Jsed Qty S	ore	User C B GH P	aroup attery acking	Note	
	Machine located Details Spare Number 1005 5003	a at: Workshop Parts Calibration Type Number CR 5B (Japanese)	Attachments Name CR2320 P7 O-ring	Task - Attachments Exter Consumed Sch 2 1	rnal Services neduled d 0 0	Jsed Qty S	ore	User C B GH P	aroup attery acking	Note	

34. After addition of consumption of P7 O-ring, your screen should look like this:

- 35. Now, let's finish the activity *90 days maintenance service*. You can do this in two ways.
- 36. You can double-click on the activity to open the Activity form, tick in *Done*, select finish date in the *Activity Done* field and press the *Save* button to save the changes (and create the next activity).
- 37. Or you can select the activity, click on right mouse button to open the quick menu and select *Done/Solved.* This function is intended for finishing multiple jobs at the same time and will finish all jobs currently selected in *Activities/Faults* data grid.

Selecting *Done/Solved* will bring up the *Batch finish* form. This form is pretty simple – it allows you to specify who is finishing the jobs (value in *Signed by* field) and when the jobs are to be finished (date in *Date finished* field). For details about remaining fields in this form, please refer to the User's Manual.

Activities	
Signed By	
GH	-
Overwrite Existing Records	
Done Date	
31. oktober 2016	-
Faults	
Signed By	
GH	-
Overwrite Existing Records	
Cause Type	
Select	-
Overwrite Existing Records	
Done Date	
pi. oktober 2016	-
Complete External Services	

38. If you select to finish the activity with help of the batch finish tool, please use user GH as finishing person. Finish date should be your current date. Once the data is entered, press the OK button to finish the activity.

39. In our final step of this walkthrough, let's take a look at the spare part consumption in the activity you've just finished and in the new activity that has just been scheduled for 90 days. Our activity/fault data grid should now look like this:

Location 4	Machines Tasks	s Spare Parts Suppliers 🔒	Activities / Faults							
er ≥ Prod uction ⊕ <i>⊕ Poduction</i> ∟ <i>≧</i> Workshop	Fault 🗠	Task Name // Fault Type	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Date	Priority	
		Weekly Service Router 17	Router Machine 17	905543.00	10/3/2016	10/3/2016	0.00			
		Weekly Service Router 17	Router Machine 17	905543.00	10/10/2016	10/11/2016	0.00			
		Weekly Service Router 17	Router Machine 17	905543.00	10/18/2016		0.00			
		90 days maintenance service	MIG/MAG welder machine	1001	10/28/2016	10/31/2016	0.00		2	
		90 days maintenance servic	e MIG/MAG welder machine	1001	1/29/2017		0.00		2	
	Page 1 showing 1 Machine located at	Page 1 showing 1 to 5 of total 5 Machine located at: Workshop								
	Details Spare Parts Calibration Attachments Task - Attachments External Services									
	Number	Type Number Name	Consumed Sc	heduled U	lsed Qty St	ore Us	ser Gn	pup	Note	
	1005	CR CR2320	2	2		G⊦	H Bat	tery		
	5003	5B (Japanese) P7 O-ring	I	1		GF	H Pao	king		

- 40. The activity you've finished is marked as done, and has the current date as the finished date. Spare part consumptions associated with the activity are now updated – values in the *Used Qty* column are now the same as the expected consumption specified in the *Scheduled* column.
- 41. Below our finished activity, you can see that next activity in line has already been created. New activity is scheduled 90 days from the finished date of its finished predecessor. Select it now and have a look at the list of spare parts that is to be consumed by this activity.

Cocation 4	Machines Task	s Spare Parts Suppliers 🖊	ctivities / Faults								
PM5 Production	Fault 🗠	Task Name // Fault Type	Machine Name	Machine No	Date	Done Date	Estimated	Fixed Date	Priority		
L. 🚔 Workshop		Weekly Service Router 17	Router Machine 17	905543.00	10/3/2016	10/3/2016	0.00				
		Weekly Service Router 17	Router Machine 17	905543.00	10/10/2016	10/11/2016	0.00				
		Weekly Service Router 17	Router Machine 17	905543.00	10/18/2016		0.00				
		90 days maintenance service	MIG/MAG welder machine	1001	10/28/2016	10/31/2016	0.00		2		
		90 days maintenance service	MIG/MAG welder machine	1001	1/29/2017		0.00		2		
	Page 1 showing 1 to 5 of total 5 Machine located at: Workshop										
	Details Spare P	arts Calibration Attachment:	s Task - Attachments Exte	ernal Services							
	Number	Type Number Name	Consumed So	heduled Us	ed Qty Sto	re Use	r Gro	up Not	e		
	1005	CR CR2320	2	0			Batte	ery			
				Associate Spar	e Part Edi	t Association	Remove Associa	ition Go T	o Spare Part		

42. The most important thing to observe here is the fact that only one spare part is listed on the spare part consumption list of the newly created activity. The spare part we added to preceding activity in step 27 of the walkthrough is not present. That's because only spare parts listed in the task are always added to new activities based on that task.

SUMMARY OF WALKTHROUGH E

- New records in main data grids are added by selecting 'New' in File menu bar or clicking on right mouse button and selecting 'New' in quick access menu.
- Lists of system variables, such as machine types, spare part types and similar are user defined and can be edited in the Administration Module.
- New tasks are created in the *Machines* section of PM5, in sub-pane *Tasks*.
- Tasks generate activities, which represent instances for when the task is performed.
- A task is always associated with a single machine.
- An activity inherits instructions about a job from the task.
- An individual activity can be adjusted and edited, but the activity that follows will revert back to what's specified in the task to which it belongs.

Final comments

It is our hope that this document will help users gain an understanding of what PM5 does and how it can help enterprises with preventive and every day maintenance tasks of their equipment. This document covers only the fundamental functionality of PM5. For further information about more complex features of PM5, we refer user to the User's Manual, which describes all features of PM5 in detail.

You are also welcome to contact PCSYS A/S directly – we will be happy to provide you with further information, demonstrations and courses tailor-made to your wishes and requirements.