



Efficiency

Plant Management Manual

Version 4.6

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Plant Management Module – Set up

First Steps

Before using the Plant Management Module, please check that the following areas of Efficiency are already set up.

Supervisor

- Operating Divisions
- Branches
- Warehouses
- Executives
- Security
- Users
- Functional Security
- User and Shared Options

Modules

- Companies and Contacts
- Vendors
- Products
- Contract (if used)

Contract Module Codes and Flags

Now you can set up the Contract Management Specific codes and Flags. These areas are explained in full detail within this manual. For any other set-ups required, please refer to the relevant manual. The following code and flag tables should be set up during the initial set up. Each table requires at least one record. The system will provide a default record of

Code: 00000

Description: Default record of

It is recommended to keep at least one default record in each table. These tables (listed with their descriptive names, the database names are given on the detailed section for each item) are grouped in three categories. Some of the data in the tables relate to the whole corporation and some may be maintained at the operating division levels.

- Mandatory/Strongly Recommended
- Optional
- Site Specific

Mandatory or Strongly Recommended

Plant Status	Corporate Level
Plant Type	Corporate Level
Plant Warranty	Corporate Level
Plant Model	Corporate Level
Shared Options	Corporate Level
User Options	User Level

Optional i.e. Default value may be used

Plant Profile Group	Corporate Level
Plant Profile Item	Corporate Level
Plant Service Run	Corporate Level
Plant Transaction Category	Corporate Level
Plant Transaction Type	Corporate Level
Plant Transaction Status	Corporate Level
Plant Defaults	Operating Division
Certificate type	Corporate Level

Codes and Flags

Plant Type

The Plant Type codes are intended to group the Plants into Type and type Category classification.

Plant Type Tables and Fields

The Plant Type codes are maintained in the Plant Type Code Table (plntype), i.e. PC, TV, Printer, Oven etc.

The data in this table is usually designed to reflect the requirements of *all Operating Divisions*.

These codes are grouped in the Plant Type Category Table (plnttypc), i.e. Computer, Kitchen Appliances, Earth Moving Equipment etc.

The data in this table should be designed to address the needs of the *entire corporation*.

Plant Type Category fields in table PLNTTYPC

<u>Field Name</u>	<u>Field Description</u>
Type Category Id	A unique identification code.
Description	The description of the type category

Plant Type Code fields in table PLNTTYPE

<u>Field Name</u>	<u>Field Description</u>
Type Id	A unique identification code for the type
Description	The description of the type
Type Category	A unique identification code for the type category

The data in the Plant Type Category table must exist before entering data in the Plant Type Code table.

Plant Type Hints and Tips

- The Type Category and item IDs should be created manually.
- The Tables must contain at least one record.
- Default records with the IDs of '00000' is recommended

Plant Type Data Example

Plant Type Category Codes

<u>Type Category Id</u>	<u>Description</u>
00000	Default Plant Type Category
COMPUTER	Computers
KITCHEN	Kitchen Appliances
EARTHMOVER	Earth Moving Equipment

Plant Type Codes

<u>Type Cat Id</u>	<u>Type Id</u>	<u>Description</u>
00000	00000	Default Plant Type
COMPUTER	PC	PC
COMPUTER	PRINT	Printer
COMPUTER	MODEM	Modem
KITCHEN	MICROW	Microwave
KITCHEN	OVEN	Oven
KITCHEN	DISHW	Dishwasher

Key

- Abc This colour highlights the typical recommended records.
 Abc This colour highlights the mandatory or system dependant records.

Plant Status

The Plant Status code is used to group the Plant records by their status, i.e. Active, Non Active, Obsolete, and On Lease etc.

Plant Status Tables and Fields

The Plant Status data is maintained in the Plant Status (plntstat) table.

The data in this table should be designed to address the needs of the entire corporation.

Plant Status fields in table PLNTSTAT

<u>Field Name</u>	<u>Field Description</u>
Status Id	A unique identification code.
Description	The description of the plant status

Plant Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- The codes of 'A=Active', 'NA=Not Active' and 'O=Obsolete' must exist in the table at all times.

Plant Status Data Example Plant Status Codes

<u>Status Id</u>	<u>Description</u>
00000	Default Call Status
A	Active Plant
NA	Not Active Plant
O	Obsolete Item

Key

- Abc* This colour highlights the typical recommended records.
Abc This colour highlights the mandatory or system dependant records.

Plant Warranty

The Plant Warranty code is used to group the plant records by their current warranty.

Plant Warranty Tables and Fields

The Plant Warranty codes are maintained in the Plant Warranty Code Table (plntwarr), i.e. New Product I Year, On Site Warranty etc.

These codes are grouped in the Warranty Category Table (plntwarc), i.e. New, On Site etc.

The data in these tables should be designed to address the needs of the *entire* corporation.

Plant Warranty Category fields in table PLNTWARC

<u>Field Name</u>	<u>Field Description</u>
Category Id	A unique identification code.
Description	The description of the warranty category

Plant Warranty fields in table PLNTWARR

<u>Field Name</u>	<u>Field Description</u>
Warranty Id	A unique identification code for the warranty
Description	The description of the type
Type Category	A unique identification code for the warranty category
Duration	The duration of the warranty in days

The data in the Warranty Category table must exist before entering data in the Warranty Code table.

Plant Warranty Hints and Tips

- The Warranty IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Plant Warranty Data Example**Warranty Category Codes**

<u>Category Id</u>	<u>Description</u>
00000	Default Warranty category
NEW	New Product Warranty
SERV	Service Warranty

Warranty Codes

<u>Category Id</u>	<u>Code Id</u>	<u>Description</u>	<u>Duration</u>
00000	00000	Default Warranty	1
NEW	NEW_1	New Product 1 year	365
NEW	NEW_2	New Product 2 years	731
NEW	NEW_3	New Product 3 years	1096
SERV	SERV_1	Service Warranty 1 Month	30
SERV	SERV_3	Service Warranty 3 Month	90

Key

- Abc This highlights the typical recommended records.
Abc This highlights the mandatory or system dependant records.

Plant Model Category

The Plant Model Category codes are intended to group the Plant Models into Category classification, i.e. Computers, Printers, Modems

The plant serial number formats can be defined at the Model Category Level.

Plant Model Category Tables and Fields

The Plant Model Category codes are maintained in the (modelcat) table.

The data in this table is usually designed to reflect the requirements of *all Operating Divisions*.

Model Category fields in table MODELCAT

<u>Field Name</u>	<u>Field Description</u>
Category Id	A unique identification code.
Description	The description of the model category
Serial Number Format	The plant serial numbers can be created automatically based on the format recorded in the Model Category and Model records. The format in the Model record overwrites the format in the Model category record

Serial Number Formats

The serial numbers may be made up from 2 generic components - Alpha + Numeric

The Alpha section can be one of the following:

Date Stamp

YYMMDD Any combination made up from the "YY", "MM" and "DD" components are all valid date stamp combinations

- YY
- YYMM

- YYMMDD
- MMDD
- YY-MM
- YY/MM/DD

Alpha

Any alpha characters (can not include any numbers) are all valid

- ABC
- PC-PENTIUM

The Numeric Section must have at least one digit of 'ZERO' after the alpha section. Each 'ZERO' digit indicates a numeric digit are all valid alpha numeric combinations

- YYMMDD0
- ABC00000

Plant Model Category Hints and Tips

- The Model Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Plant Model Category Codes Example

Plant Model Category Codes

<u>Category Id</u>	<u>Description</u>
00000	Default Model category
COMP	Computers
PRNT	Printers

Key

Abc: This colour highlights the typical recommended records.

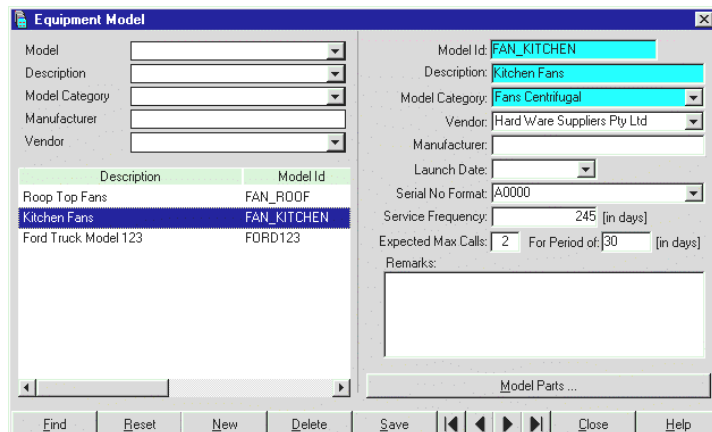
Abc: This colour highlights the mandatory or system dependant records.

Equipment Model

The Plant Model codes are intended to group the Plants into Models and Model Category classification, i.e. IBM PC 600, EPSON Ink Jet etc.

The Plant Model codes are maintained in the (eqpmodel) table. The data in this table is usually designed to reflect the requirements of *all Operating Divisions*. Each model record is linked to a Model Category record.

The Plant Model Maintenance window is accessed from the Plant Module bar menu.



Data Fields

The user can maintain the following fields.

Model id: A unique Id for the model record.

Description: Description of the model.

Model Category The model category that this model belongs to.

Vendor: The vendor who is the usual supplier of this model.

Manufacturer: The name of the manufacturer of this model.

Launch Date: The date of the launch of this model.

Remarks: Remarks for the model.

Serial Number Format

The plant serial numbers can be created automatically based on the format recorded in the Model Category and Model records. The format in the Model record overwrites the format in the Model category record.

The serial numbers may be made up from 2 generic components

Alpha + Numeric

The Alpha section can be one of the following

Date Stamp: YYMMDD Any combination made up from the "YY", "MM" and "DD" components

- YY
- YYMM
- YYMMDD
- MMDD
- YY-MM
- YY/MM/DD

are all valid date stamp combinations

Alpha: Any alpha characters (can not include any numbers)

- ABC
- PC-PENTIUM

are all valid

The Numeric Section must have at least one digit of 'ZERO' after the alpha section. Each 'ZERO' digit indicates a numeric digit.

- YYMMDD0
- ABC00000

are all valid alpha numeric combinations

Plant Service Frequency Check

The following fields should be set as the control value for the Plant Service Frequency Check.

Expected max Calls: The maximum number of service calls that may be expected for a nominated period. Leave this value blank if the control is not required.

For Period Of: The number of days that applies the expected maximum service. Leave this value blank if the control is not required.

Model Parts

Click on this button to activate the Model Parts maintenance window.

Plant Service Run

The Plant Service Run values are maintained so that an appropriate run value can be attached to a plant.

A field in the Plant Site window will allow the user to select a RUN value for this plant. This is useful to organise the routine and repetitive maintenance work.

The current Run value is also displayed on the Plant Maintenance window.

Plant Service Run Tables and Fields

The Plant Service Run data is maintained in the (perplups) table. The group key word is 'SERVRUN'

The data in this table should be designed to address the needs of the entire corporation.

Plant Transaction Type fields in table PLNTRTNT

<u>Field Name</u>	<u>Field Description</u>
Run Id	A unique identification code.
Description	The description of the Service Run

Plant Service Run Hints and Tips

- The Run IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Plant Service Run Data Example**Plant Service Run Codes**

<u>Type Id</u>	<u>Description</u>
00000	Default Run
CBD	CBD Run
SSYD	South Sydney
NSYD	North Sydney

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Plant Transaction Category

The Plant Transactions Category code is used to group the Plant Transactions records within the Category Groups

If the transactions are used for varying data as a data warehouse and presented in different datawindow objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Plant Transaction Category Tables and Fields

The Plant Transaction Category data is maintained in the Plant Transaction Category (plntrnc) table.

The data in this table should be designed to address the needs of the entire corporation.

Plant Transaction Category fields in table PLNTRNC

<u>Field Name</u>	<u>Field Description</u>
Category Id	A unique identification code.
Description	The description of the Transaction Category

Plant Transaction Category Hints and Tips

- The Category IDs should be created manually.

Category Hints and Tips

- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Plant Transaction**Category Data Example****Plant Transaction Category Codes**

<u>Type Id</u>	<u>Description</u>
00000	Default Type
C1	Category One
C2	Category Two

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Plant Transaction Status

The Plant Transactions Status code is used to group the Plant Transactions records within the Status Groups

Plant Transaction Status Tables and Fields

The Plant Transaction Status data is maintained in the Plant Transaction Status (plnttrns) table.

The data in this table should be designed to address the needs of the entire corporation.

Plant Transaction Status fields in table PLNTRNS

<u>Field Name</u>	<u>Field Description</u>
Status Id	A unique identification code.
Description	The description of the Transaction status

Plant Transaction Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Plant Transaction Status Data Example
Plant Transaction Status Codes

<u>Status Id</u>	<u>Description</u>
00000	Default Call Status
C	Closed
A	Active

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Plant Transaction Type

The Plant Transactions Type code is used to group the Plant Transactions records within the Type Groups

If the transactions are used for varying data as a data warehouse and presented in different datawindow objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Plant Transaction Type Tables and Fields

The Plant Transaction Type data is maintained in the Plant Transaction Type (plnttrnt) table. The data in this table should be designed to address the needs of the entire corporation.

Plant Transaction Type fields in table PLNTRNT

<u>Field Name</u>	<u>Field Description</u>
Type Id	A unique identification code.

	Type Id	A unique identification code.
	Description	The description of the Transaction Type
Plant Transaction Type Hints and Tips	-	The Type IDs should be created manually.
	-	The Table must contain at least one record.
	-	Default records with the IDs of '00000' is recommended

Plant Transaction Type Data Example	Plant Transaction Type Codes
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<u>Type Id</u>	<u>Description</u>
<i>00000</i>	<i>Default Type</i>
T1	Type One
T2	Type Two

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Certificate Type	The Codes and Flags maintenance utility is provided with a new item to maintain the drop down list for this field.
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The system look up key word is 'CERTTYPE'

Plant Module – Maintenance

Plant Master

The Plant Master Tab is used to create a new record or to locate the existing plant record in order to change the data or to perform various functions on the tab folder.

The plant master details are maintained in the Plant Master (Plant) table.

Plant Tab Folder

The Plant Tab Folder is designed to maintain the Plant Module.

The screenshot shows a software window titled 'Plant' with two tabs: 'Plant 1' and 'Site 2'. The 'Plant 1' tab is active and contains the following fields:

- Plant ID: 100001
- Serial No: 100-1001
- Type: Centrifugal Fans
- Model: Rooftop Fans
- Product Id: P254MC
- Prod Desc: Profile 250 mm Corrugated
- Vendor: Hard Ware Suppliers Pty Ltd
- Fault Cat: Default fault Category
- Warranty: New Product 1 year
- Remarks: This fan was refurbished
- Description: Fan over the roof, 12 KW
- Status: Active
- Qty: 1
- Current Location:
 - Company: Hold Down Fasteners
 - Site: Hold Down Fasteners
 - Location: top of the elevator
- First Installation:
 - Date: 09/06/1997
 - Time: 00:00

At the bottom of the window, there is a toolbar with buttons: Search, Print, Clear, New, Reset, Delete, Detail, Save, Exit, and Help.

How to Find an Existing Plant Record

There are three ways of finding an existing record:

1. On Screen Search
2. Search by Standard Search Engine
3. Search by Enhanced Search Engine

On Screen Search

You can find the existing plant record using any combination of the following fields:

- Product
- Vendor
- Plant Status
- Plant Type
- Model

You should always type in at least 2 or 3 letters of the search name. Click on the drop down arrow or press the <F4> key.

The pre-keyed letters will act as an instant filter and the system will display you a drop down pick list of the plants starting with the entered letters. The more you had typed in the field before attempting the search will make the list presented so much more precise.

Highlight the required name and either click on it or press the <Tab> key. If you had used the tab key, the empty spaces on the window will be filled with the plant's data. On the other hand if you had clicked on the pick list then the selected data will be displayed on the field. Now either click on any other field at the top section of the window or simply press the tab. The plant's data will be displayed as a previous selection.

Note: Your access to some plants may be limited by your current access privileges.

Filter Plant Ids

If you wish to filter the content of the Plant Id Drop Down List Box, first enter the filter values in one or more of the following fields:

Product	Plant Status
Vendor	Plant Type
	Model

The Operating Division of the User Executive always filters the Drop Down list.

Filter Plant Descriptions

If you wish to filter the content of the Plant Description Drop Down List Box, first enter the filter values in one or more of the following fields:

- Product
- Vendor
- Plant Status
- Plant Type
- Model

The Operating Division of the User Executive always filters the Drop Down list.

Search by Standard Search Engine

When the Search button was clicked the search engine window is displayed:

There are two sections on this window. You can enter any selection criteria in the top Query section. When the Find button is clicked the matching results set will be displayed in the second window. Highlight the required record and click on the OK button to return to the Plant window with the selected plant record.

If a plant description fully or partially was entered in the plant screen before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

Search by Enhanced Search Engine

If the 'Plant Search Engine Stays Open' entry was set to Yes in the Plant section of the user options system will change the standard behaviour of the search engine to a continuous pick list.

The Search Engine window is now resizable and movable on the screen to a suitable location.

Make your query and selection as usual and click on the Find button. Double click on the selected line or click on the OK button will display the details of the selected record on the Plant Tab Sheet.

This allows the user to search the database and freely move up and down on the selected list

How to Edit an Existing Plant Record

You can alter any information on the window which is also regulated by the edit privileges which had been granted to you.

Once the editing is finished simply click on the <SAVE> button.

How to Create a New Plant Record

When you are ready to create a new record click on the <NEW> button.

If the system was set to an "AUTOMATIC" id creation mode a system generated sequential number will be displayed in the ID field. Otherwise enter a unique identification code for this plant.

The MANUAL Id assignment is recommended. Your cursor will be moved to the Description field so that you can start entering the new data.

Plant Master Field Attributes

The data fields may carry various attributes:

Key Fields: The labels for these fields are presented in dark blue.

Mandatory Fields: You must enter a value in such fields and they are presented with a very distinctive colour (usually in light blue).

Functional Fields: The point will change from "Arrow" to a "Cross" when the cursor is on such a field. Double clicking on these fields will usually pop up a related utility, such as the calendar, clock or link to another module by using values obtained from the clicked field (or even the whole row).

Audited Fields: There is no visual attribute to tell you that the field is being audited. However, if you have such a field, simply double click on it. You will see a detailed table showing the complete change audit for the values that had been altered in this field.

No Enter fields: Displayed in grey colour. The grey colour indicates that the data entry on the field is disabled. In some cases this is a temporary situation; in other cases it is permanent.

Plant Defaults

If there was a plant assigned to the user, the plant default values will populate some of the fields.

If there is more than one default record, selecting <Select Defaults> option from can activate a pick list right click menu to select another set of default values.

Data Fields

The user can maintain or read the following fields:

Plant Id: A unique identification code for the plant.

Serial No: The plant serial no.

Type: The plant type.

Model: The model id of this plant.

Product Id: The product id, if it directly relates to this plant.

Prod Description: The product description, if it directly relates to this plant.

Vendor: The vendor that is the original supplier of this plant.

Fault Category: The fault code category when doing support calls.

Warranty: Type of the warranty usually applied to the plant.

Remarks: The general notes and remarks for this plant. OPTIONS: Zoom Remarks.

Description: The description of the plant.

Status: Current status of the plant

Qty: The qty of items covered in this global plant id.

Op Division: Operating Division.

Print Doc: The report template to print the plant details.

Current Location

Company: Company name, which the plant is located.

Site: Company site, which the plant is located.

Location: Location of the plant within the company.

Current Run: is also displayed from the Plant Site Maintenance window.

First Installation

Date: The first installation or start up date for this plant. OPTIONS: Calendar.

Time: The first installation or start up time for this plant.

Plant Master Details

Pressing the detail button on the main tab will display the following screen.

The screenshot shows a software window titled 'Plant' with two tabs: 'Plant 1' and 'Site 2'. The window contains several data entry sections:

- Plant Value:** Original Value (100), Current Value (00), Current Value Date (08/05/2000).
- Service:** Last Serviced (05/01/2001), Service Interval (200 (Days)), Next Scheduled Service (28/07/2001), Calls Since Check Date, Check Date.
- Ownership History:** Purchase Company (01230), Purchase Site (Apcon Pty Ltd), Last Company (Hold Down Fisherm), Last Site.
- Readings and Certification:** Meter Reading (1234), Date (12/12/1999), Cycle (120 (Days)), Certification Type (Certificate Type 1), Date (11/12/2000), Cycle (250 (Days)).

At the bottom of the window is a menu bar with options: Search, Print, Open, New, Break, Delete, Merge, Save, Exit, Help.

Plant Value

Original Value: The original value of the plant.

Current Value: The current value of the plant.

Current Value Date: The date which applies to the current value of the plant.

Service

Last Service: The date of the last service for this plant./

Service Interval: The recommended service interval (days) for this plant.

Next Scheduled Service: The expected next service date for this plant. This value is updated by the system if Preventative Maintenance is used.

When the service log or a service transaction was created and a plant was attached to it the Calls Since Check Date counter in the Plant table and the Check Date values will be updated by the following logic.

If (No of Days = today – Check Date <= Maximum Call Days Period) then add 1 to the Calls Since Check Date counter or

If (No of Days = today – Check Date > Maximum Call Days Period) then set the Calls Since Check Date counter = 1.

If the Calls Since Check Date counter is \geq then the Expected Maximum Calls from the Plant's Model then inform the user with a warning message.

Ownership History

Purchase Company: The company that is the original purchaser of this plant.

Purchase Site: The site that is the original purchaser of this plant.

Last Company: The company that had the plant last.

Last Site: The site that had the plant last.

Readings and Certification

Meter Reading: The value of the meter reading

Date of Reading: The date of the last meter reading.

Meter Reading Cycle: The meter reading frequency in days.

Certificate Type: Select a valid certificate type

Certification Date: The date of the last certification.

Certification Cycle: The certification frequency in days.

Command Buttons

Search

Activates the search engine for Plant module.

Clear

Clears the entire window so that a new search can be initiated. If this button was pressed during a new record creation or editing, the "save, yes-no?" dialogue box will require a confirmation of the action.

New

Creates a unique system number for the plant and sets the cursor on the Description field so that the new data can be entered.

Reset

This is a 'Bail Out' button. If you are not happy with what you have been entering on the window, this button will reset the data back to the original state. You must respond to the confirmation dialogue box for save or reset.

Save

Press here to save the values on the screen (temporary) to the database (permanent).

Delete

If you click on this button one of many things may happen depending on the configuration of your system and your current privileges.

1. Nothing happens, you do not have enough privileges to delete the record.
2. Systems response to request with a confirmation dialogue box, when confirmed one of many things may happen:
 - 2.a If the "Soft Delete" option was put on by the supervisor, a dialogue will capture your reason for requesting the deletion of the record and sets the colour red on the text so that all the other users will know that this record is going to be deleted by the supervisor.
 - 2.b. If the standard delete function was enabled, based on your privilege,

system will attempt to delete the record and all of its children records.

2.c. If the campaign was used by any other system, such as Order entry or Support module, etc, the deletion will be rejected.

Exit

Closes the complete tab folder.

Help

Activates the help screen related to this section.

Plant Site Details

Each plant is registered to a Company Site. The previous plant site records are kept as history.

The screenshot displays a software window titled 'Plant' with two tabs: 'Plant 1' and 'Site 2'. The 'Plant 1' tab contains the following fields:

- Plant: Copy of "Copy of "Fan over the roof, 12 KW""
- Plant Site: 3001521
- Type: VENT_3
- Serial No: 100-1001
- Status: Active
- Asset No: [empty]
- Quantity: 1
- Company: 010066
- Co Name: Hold Down Fasteners
- Site: Hold Down Fasteners
- Contact: John Brown
- Location: top of the elevator
- Warranty: New Product 1 year
- Remarks: [empty text area]

The 'Site 2' tab contains the following fields:

- Dates - Last: 15/08/00
- Expires: 01/08/01
- Duration: One Year
- Install: 01/08/00
- Warranty: 01/08/00
- Service: 05/02/01
- Invoices: [empty]
- Insure: [empty]
- Lease: [empty]
- Date: [empty]
- Time: 00:00
- Contract: [empty]
- Op Div: 00000

At the bottom of the window, there are buttons for Contract..., New, Reset, Delete, Detail, Save, Exit, and Help.

Data Fields

Plant: The description of the Plant item as entered in the Plant Tab.

Plant Site Id: The system generated Plant site Id of this plant item at this site

Type: The plant Type from the first Tab

Serial No: The serial number of this plant item.

Status: The status of this plant item at this site.

Asset No: The client's asset number for the plant.

Quantity: The qty of items covered in this global plant id.

Company and Contact

Each plant belongs to a Company Site and assigned to a contact (employee) of this site.

You can click on the Company button to activate the company search engine or use the dropdown look up list to locate the company.

Company Id: The company id for the plant site.

Co Name: Company name for the plant site.

Site: Company site for the plant site.

Contact: The contact (employee) who signed the plant site.

Location: The location of the plant at the site.

Service Run: Select a RUN value for this plant. This is useful to organise the routine and repetitive maintenance work.

Warranty: The id code of the warranty type that currently applies to this plant.

Remarks: The general site notes and remarks for this plant.

Site Install: The first installation or start up date at the current site.

Warranty Last: The start date of the current warranty.

Warranty Expires: The expiry date of the current warranty.

Duration: The duration of the warranty period.

Service Last: The date of the last service for this plant.

Service Expires: The expected next service date for this plant.

Service Duration: The recommended preventative service interval (days) for this plant.

Invoice: The date of the last invoice for this plant.

Insurance: The date on which the insurance will expire.

Operating Division: The operating division assigned to this Plant site.

Lease Details

Lease Date: The start date of the current lease.

Date Expires: The expiry date of the current lease.

Date Duration: The duration of the current lease.

Time Last: The start time of the current lease.

Time Expires: The expiry time of the current lease.

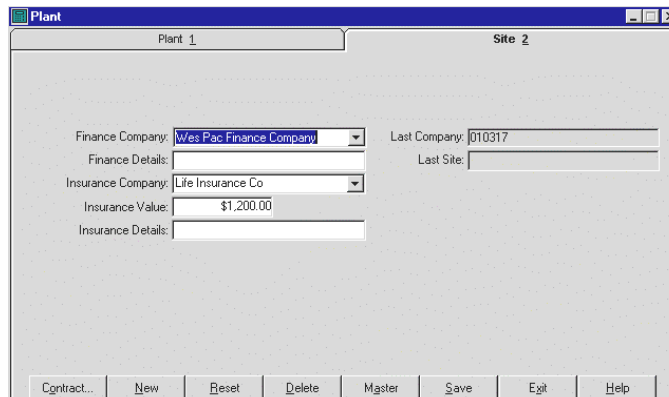
Time Duration: The time duration of the current lease.

Contract: The leases contract id if applicable.

Plant Site Details

Pressing the Detail button the following screen will appear.

In this screen extra details about the plant can be entered.



Data Fields

Finance Company: The finance company (vendor) which is currently financing the plant.

Finance Details: The finance details if applicable.

Insurance Company: The insurance company (vendor) which is currently insuring the plant.

Insurance Details: The insurance details if applicable.

Plant Serial Numbers

To generate a serial number for the plant find the plant record first.

Select Generate Serial Numbers option from the Pop Up menu.

A serial number will be generated using the following rules

The serial format is recorded in the Model Category and Model records. The format in the Model record overwrites the format in the Model category record.

The serial numbers may be made up from 2 generic components

Alpha + Numeric

The Alpha section can be one of the following

Date Stamp: YYMMDD Any combination made up from the "YY", "MM" and "DD" components

- YY
- YYMM
- YYMMDD
- MMDD
- YY-MM
- YY/MM/DD

Alpha: Any alpha characters (can not include any numbers)

- ABC
- PC-PENTIUM

are all valid

The Numeric Section must have at least one digit of 'ZERO' after the alpha section. Each 'ZERO' digit indicates a numeric digit.

- YYMMDD0
- ABC00000

Model Parts

Model parts can be attached using the following screen.

This screen can be accessed from the Equipment Model maintenance screen.

Id	Product Description	Quantity
7402_1001	Chef Classic EWOCEW WHITE wallover	
7402_1002	Chef Classic EWOCEBL BLACK Wallover	
7402_1003	Chef Classic EWOCEB WOver	

Prod ID: 7402_1001

Part Description: Chef Classic EWOCEW WHITE wallover

Quantity: 1.00

Buttons: New, Delete, Save, Navigation, Close, Help

Data Fields

This data can be attached to the plant record for changing the parts at the plant level.

Prod Id: Product Id

Description: The description of the part.

Quantity: The quantity of this plant in the plant.

Command Buttons**New**

Creates a new part.

Delete

Deletes the part.

Save

Saves the part.

Close

Closes the window.

Help

Activates help screen relevant to this section.

Plant Parts

Plant parts can be attached using the following screen.

This screen can be accessed from right click menu and select Plant parts.

Plant Parts can be created from the Product BOM as well as from the Model Parts.

Description	Serial Number	Model Part	Qty
Axe - Ford Truck Model 123 - Left Rear		No	1
Axe - Ford Truck Model 123 - Right Front		No	1
Axe - Ford Truck Model 123 - Right Rear	12-2345-122	No	1
Axe - Ford Truck Model 123 - Left Front		No	1
Tube 250 mm C Unflanged		No	1

Part ID: 52 Model Part: No Quantity: 1,000
 Prod ID: P25 Serial No: 12-2345-122
 Description: Axe - Ford Truck Model 123 - Right Rear Installed Date: 04/00/2000
 Vendor: Mitsi Electrical Supplies Next Service: 10/06/2003
 Replacement: Replaced Date: Lost Service:
 New S/No: History:
 Condition:
 Wear Rate:
 Life Expect:
 Remarks:

Copy Parts From Model... Copy Parts From BOM...
 New Delete Save Select Close Help

Data Fields

Part Id: A unique identification code for the plant.

Prod Id: Product Id.

Description: The description of the part.

Quantity: The quantity of this plant in the plant.

Vendor: A unique Identification code of the vendor.

Installed Date: The first installation or start-up date of the part OPTIONS: Calendar.

Last Service Date: The last service date of the part. OPTIONS: Calendar.

Next Service Date: The next service date if the part.

Model Part: Plant model part number.

Serial Number. The part serial number.

Replacement: Part replacement option.

Replacement Date: Part replacement date.

New S/No: Replacement part serial number.

Plant Parts also includes the following condition and history related information.

- Condition
- History
- Wear Rate
- Life Expectancy
- Remarks

All these fields can have large amounts of data.

Double click on the field to zoom in a larger edit window. The data on the edit window can be printed or saved in another format

Command Buttons**Copy Parts From Module**

Click on this button to copy the Model Parts down as Plant Parts.

New

Creates a new part.

Delete

Deletes the part.

Save

Saves the part.

Select

If this window was started from the Spare Parts maintenance tab click on this button to return with the part.

Left and Right Arrow Buttons

These buttons will allow you to flick from one item to another in the list.

Close

Closes the window.

Help

Activates help screen relevant to this section.

Plant Service Frequency Check

It is possible to control the total number of Service Calls for a plant for the nominated control period.

The following fields should be set as the control value in the Plant's model maintenance.

Expected max Calls: The maximum number of service calls that may be expected for a nominated period. Leave this value blank if the control is not required.

For Period Of: The number of days that applies the expected maximum service. Leave this value blank if the control is not required.

When the service log or a service transaction was created and a plant was attached to it the Calls Since Check Date counter in the Plant table and the Check Date values will be updated by the following logic.

If (No of Days = today – Check Date <= Maximum Call Days Period) then add 1 to the Calls Since Check Date counter or

If (No of Days = today – Check Date > Maximum Call Days Period) then set the Calls Since Check Date counter = 1.

If the Calls Since Check Date counter is >= then the Expected Maximum Calls from the Plant's Model then inform the user with a warning message.

Plant Service Run

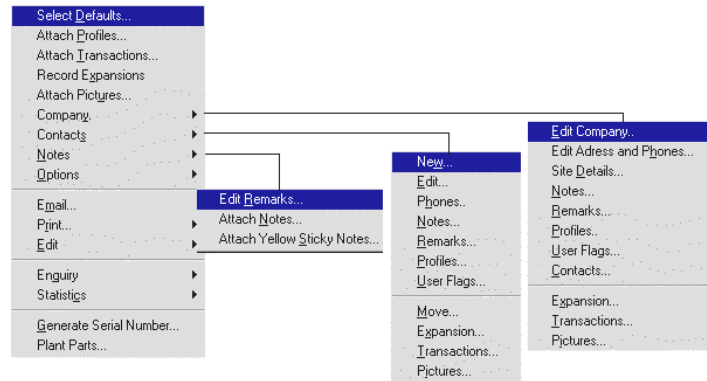
The Plant Service Run values are maintained so that an appropriate run value can be attached to a plant. A field in the Plant Site window will allow the user to select a RUN value for this plant. This is useful to organise the routine and repetitive maintenance work. The current Run value is also displayed on the Plant Maintenance window.

Plant Preventative Maintenance

The Plant Preventative Maintenance is automated. Selected major key types will automatically update the next scheduled service date on the plant record when the support transaction is closed. See the details under the Support and Service section of this document.

Plant Pop Up Menu Options

From the Plant Module the user may right mouse click in any grey area on any Tab to obtain a list of additional functions or enquiries available;



Select Defaults

Information as set up in the selected default will be updated into the current plant record automatically during a new plant record creation as detailed under the Module Defaults topic.

Attach Profiles

Each plant record can have many profile items attached to it as described under Plant Profiles topic.

Attach Transactions

Each plant record can have many transactions attached to it as described under the Module Transactions topic.

Record Expansions

Additional information can be created for each Plant Record and accessed instantaneously as described under the Module Expansion topic.

Attach Pictures

Each plant record can have pictures, documents, audio and video objects as described under the Pictures topic.

Company Sub Menu

Edit the company and its various features and attributes, which have the contract.

Edit Company

Edit Contract's company module.

Company – Address and Phones

Edit the company address and phones.

Company – Site Details

Edit company site details.

Company – Notes

Edit the company notes

Company – Remarks

Edit the company remarks

Company – Profiles

Edit the company profiles

Company – User Flags

Edit company user flags

Company – Contacts

List and edit company contacts

Company – Expansion

Access and edit company expansion records if they have been set-up

Company – Transactions

Access and edit company transactions

Company – Pictures

List and Edit the company pictures

Contacts Sub Menu

Edit the employee (contact) and its features and attributes that were assigned to this contract.

Contacts – New

Create a new company contact.

Contacts – Edit

Edit the current company contact.

Contacts – Phones

Edit company contacts phone numbers.

Contacts – Notes

Edit the company contacts notes.

Contacts – Remarks

Edit the company contacts remarks

Contacts – Profiles

List and edit the company contacts profiles

Contacts – User Flags

Edits the company contacts user flags

Contacts – Expansion

List and edit the company contacts expansion records

Contacts – Transactions

List and edit the company contacts transactions records

Contacts – Pictures

List and edit the company contacts pictures

Activities Sub Menu

Activities – To Do List

Edit to do list for the plant

Notes Sub Menu

Edit Remarks

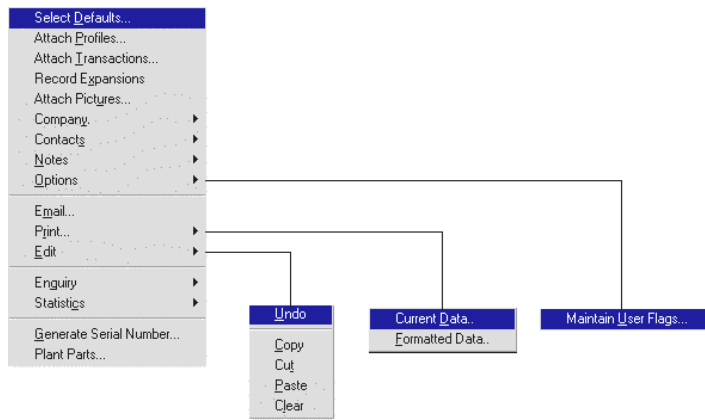
Remarks attached to each Executive Record can be edited, added or deleted as described under the Module Remarks topic.

Attach Notes

Unlimited number of secured, date time stamped and sorted notes can be attached to each Plant Record as described under the Module Notes topic.

Attach Yellow Sticky Notes

Yellow Sticky Notes that can be automatically displayed when finding the record can be attached to each plant record as described under the Yellow Sticky Notes topic.



Options Sub Menu

Maintain User Flags

Up to 5 User Flags can be added to each Plant record as generally described under the topic of User Flags Maintenance.

Email

This will activate the Email facilities. Refer to the Email topic for general information.

Print Sub Menu

The screen print or to print a pre-designated report can be processed here.

Print Current Data

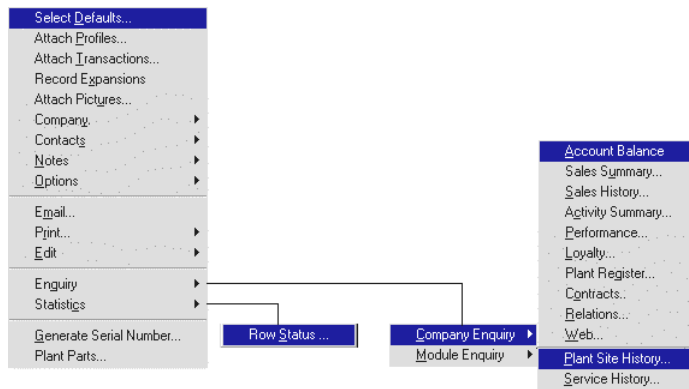
Click on this to print the active data window. The Print Function details how to print and the available options.

Print Formatted Data

Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current contact record. The Print Function details how to print and the available options.

Edit Sub Menu

Selecting the appropriate option can perform the Undo, Copy, Cut, Clear and Paste functions at the field level.



Enquiry Sub Menu

Enquiry – Company Enquiry - Account Balance

Activates account balance screen for the company

Enquiry – Company Enquiry – Sales Summary

Activates sales summary screen for the company

Enquiry – Company Enquiry – Sales History

Activates sales history for the company.

Enquiry – Company Enquiry – Activity Summary

Activates company activity summary screen.

Enquiry – Company Enquiry – Plant Register

Activates the company plant registry search screen.

Enquiry – Company Enquiry – Contacts

Activates company contacts search screen.

Enquiry – Company Enquiry – Relations

Activates company relation screen

Enquiry – Company Enquiry --Web

Activates Internet explorer screen.

Module Enquiry

Plant Site History

Activates the plant site history screen.

Plant Service History

Activates plant service history

Statistics Sub Menu

Statistics – Row Status and Row Count

Click on one of the above menu entires display the status of the record as described under the Statistics topic.

Generate Serial Number

When this option is selected, the system will assign serial number automatically to newly created plant.

Plant Parts

Activates the plant parts screen.

Plant Profiles

You can add as many user defined Profile Groups and Items to the Plant records.

Plant Copy Over

The plant copy over function creates a new plant and if the Plant Site copy option was selected then it creates the plant site record for the current company site.

Plant Defaults

Plant default values are preset some of field values that populates when a new Plant is created.

In order for this option to work, supervisor has to enable it in user option set-up.

Data Fields

Plant Default Id: The plant default template id.

Model Category: The default plant model.

Plant Type: The default plant type.

Plant Status: The default plant status.

Plant Warranty: The default plant warranty.

Service Interval: The service interval in days.

Description: The description of the plant default.

Branch: The branch identification code.

Department: The department identification code.

User Flags 1-5: A user defined flag selected from the profiles table.

Plant Routing

There are four methods of creating Plants and Plant Sites in Efficiency.

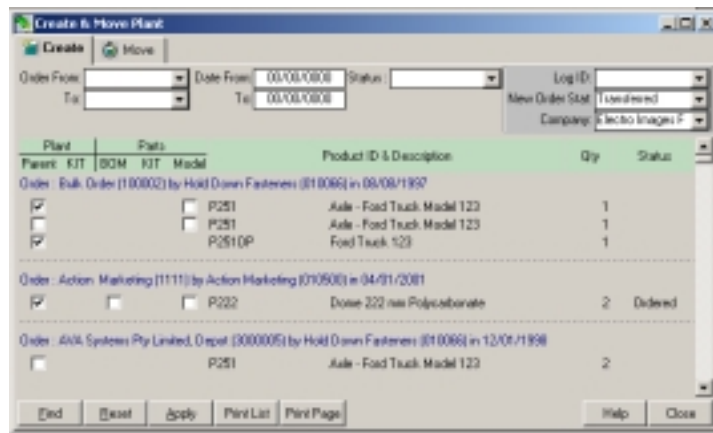
1. Manual
2. Using the Task Manager when data was imported from Host system to sales history.
3. 3. Using Plant Copy function in the supervisor module.
4. 4. From Order Entry Using the Plant Routing utility.

The Plant Routing is also used to move plants to the end users from a central service site.

Create Plants From Order Lines

The top left section on the Create Tab is designed to enter the selection criteria to list the orders. Please ensure to enter a status so that the previously processed orders will not appear on the list again.

The top right section is allocated for the assignment values that are used during creation of a new plant.



Display Options

Only the product items with the Plant Create = Y option will be displayed on this list.

Plant Creation Options

Parent: Check this box to create plant from the order line product item.

KIT: Check this box to create plant from each KIT line of the order line.

When any above boxes is checked the Parts Creation Options will be available.

Parts Creation Options: If the plant parts are to be created there are 3 possible options.

BOM: Check this box to create plant parts from the product's BOM.

KIT: Check this box to create plant parts from the product's Order KIT. Note: If the Plant creation mode was set to KIT this options should not be used.

Model: Check this box to copy the plant parts from the model parts.

Click on the <APPLY> button to create plant based on the following options as selected on the top right options box.

Log ID: If there was a valid Log Id in this field a new support transaction will be created and the plant will be assigned to this new transaction.

New Order Stat: The order status will be changed to this status. This is recommended.

Company: if there is a valid company (site) was selected in this field the Plant site will be assigned to this site. Otherwise the plant site will be assigned to the company site of the order.

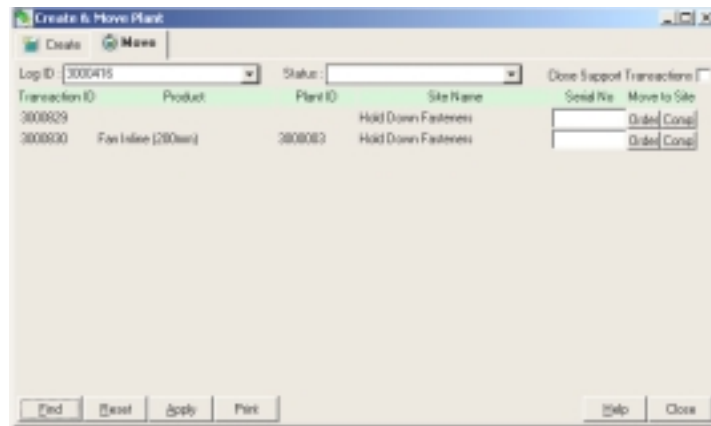
Print

There is two types of print on this window:

- **Print List:** will print the list of the selected items from the window.
- **Print Page:** will print the list of the selected items for each order number from the window.

Move Plants

The Move Tab is designed to move the plants from the existing service site to the end user sites.



Top section of the tab is for entering the selection criteria.

Log Id: Select a Log ID to process.

Status: Select a Support Log Transaction status to list.

Close Support Transaction: Check this box if the transaction is going to be closed after moving the plant to a new site.

Click on the <FIND> button to display the support transaction lines with the Plants.

The Site Name column displays the name of the current Plant Site. To move a plant to a new site there is two methods activated by clicking on one of the following buttons at each line.

Order Button: Assigns the Order Site as the new Plant Site.

Comp Button: Starts the company search engine window. Select a company site. On return to this window the selected company site will be assigned as the new Plant Site.

The new site assignment is designated by changing the text colour of the site name into dark blue.

You can also enter the serial number of the Plant here.

Click on the <APPLY> button to process the plant movement. The following will occur.

1. Existing Plant Site status will be changed to NA- Not Active.
2. A new Plant site will be created for the new Plant Site assignment with the status of Active and the serial number if it was entered.
3. The Support Transaction will be closed if the check box was checked.

Double click on the line to access the plant details before or after the Apply.

Click on the Print button to print the movement list.

Plant Reports and Enquiries

Efficiency basic system is provided with various Plant management reports.

User can design any number of plant reports using the InfoMaker report writer. A blank report library named 'PLNTRPTS.PBL' is provided under the 'Reports' subdirectory of each client.

How to set up reports in InfoMaker is found under the InfoMaker Reports Set Up topic.

Plant Reports

<u>Report Group</u>	<u>Report Item</u>
Plant Lists:	By Profile By Id By Serial Number By Site Data Page By Model
Parts:	Plant Parts Model Parts By Media
History:	Service Movements

Plant Enquiries

Various enquiry windows for the plant are provided. The following are typical.

Plant Site History

The list of the plant site history is listed on this window.

Company	Site	Location	Install Date	Plant Status
Allech Business Technology	Allech Business Technolc	Near the elevator	05/10/1999	Not Active
Apson Pty Ltd	Apson Pty Ltd	behind the elevator	01/10/1999	Active
Hold Down Fasteners	Hold Down Fasteners	Top of the Paint shop	11/11/1997	Not Active

The current site is shown in black and old ones are shown in blue.

Click on the Detail On/Off button to toggle between the summary and details mode.

Plant Support History

The list of the plant service history is listed on this window.

The open service logs are shown in black and closed ones are shown in blue.

Double click on a selected service line to open the related service log details.

Log No	Supp Tran Id	Company	Site	Contact
Client Ref	Status	Supp Type Id	Log Date	Log Time
			Close Date	Time
				Executive
3000216	3000245	Apson Pty Ltd	Apson Pty Ltd	John Hill
	Active	In House service	14/08/2000 23:28	Ahmet Ajara
3000111	3000151	Hold Down Fasteners	Hold Down Fasteners	Ahmet Ajara
	Active	In House service	20/11/1999 11:35	
3000047	3000055	Hold Down Fasteners	Hold Down Fasteners	Terry Gerzen
	JH456 Invoice read	In House service	13/07/1999 14:45	13/07/199 15:00:44 Ahmet Ajara
3000025	3000048	Hold Down Fasteners	Hold Down Fasteners	Terry Gerzen
	Active	Efficiency Support	16/07/1999 16:47	Ahmet Ajara

Click on the Detail On/Off button to toggle between the summary and details mode.