New Feature Summary

These features have been incorporated into Benchmate CMMS version 8.04.0 since the release of 8.03.0:

1. Validation Files – provide more flexible search (e.g.: not limited to Part Number or Equipment ID),
2. Work Tickets – can be <u>printed to screen</u>
3. Close Jobs can be initiated from PM, TC or WO screen,
4. TC, WO or PM can be <u>created</u> or <u>viewed</u> from Equipment screen,
5. 'One Click' windows to show List of Jobs:
   a. <u>New Trouble Calls</u> (requested maintenance but not scheduled),
   b. <u>Recently Service Log Activity</u> (for supervisors to quickly review recent work),
   c. <u>Critical Jobs</u> (check on high priority jobs).
6. Time-of-Day entry (Service Log screen) has been simplified and is easier to use and understand.

Benchmate screens and reports have been enhanced as follows:

- **PM, TC & WO screens**
  o Job 'STARTED' Status Code for PM, TC & WO screens – Jobs that have been started but not completed are assigned this status code for easy identification.
- **Job Schedule and Work Tickets**
  o reports can be filtered by 'ASSIGNED TO′ (person assigned to job) – each technician can have his own list of jobs as an Adobe PDF file or hard copy.
  o 'Right Click' menu on Job Schedule report menu to print Work Tickets using schedule report parameters (saves re-entering menu entries in Work Ticket Report menu).
- **Response Time Report**
  o CAUSE CODE now included in report
  o <u>'Link'</u> opens corresponding Service Log for job details.
- **Cost Summary Report**
  o can be output to TAB TEXT file
- **Service Log Screen**
  o new Response Time window shows Date Time for 1) maintenance requested, 2job started (with PDA option) and 3) maintenance completed.
- **Spare Parts Screen**
  o added F9 Find by SOURCE
- **Equipment Screen**
  o added optional EQID TYPE validation
- **Signed On Users**
  o Shows users currently signed on to Benchmate
 o When starting, checks to see if user has signed on previously but not 'logged out'.

Equipment and Spares Validation

Validation for spare part number (PART NBR) and the equipment id (EQID) now provide for look up by PART NAME (parts) or EQUIP NAME which may be more familiar than the part number or equipment id. (We will illustrate using parts though equipment and vendor validate work in the same manner.)

After highlighting the PART NBR field (e.g.: Service Log screen), click or press F8 VALDN, to display the Spare Parts List to view the parts list sorted by part number.
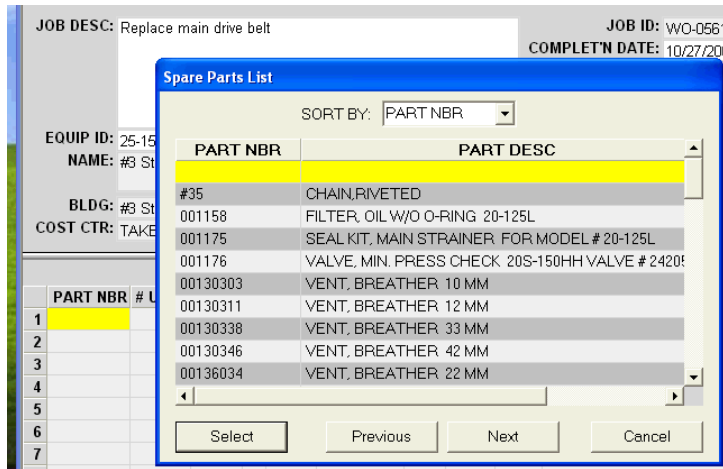
To view by name, select SORT BY at the top of the window, click PART NAME and enter the first few characters of the PART DESC (e.g.: BELT) to view a list of belts.
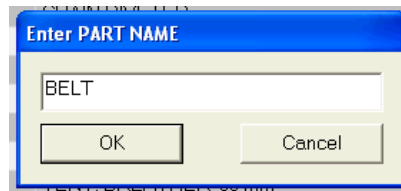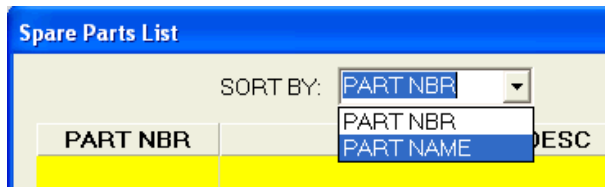

Then scroll to the desired part and click Select (or double click the selected part). Note the Next and Previous buttons to skip forward or backward through the file a page-at-a-time.
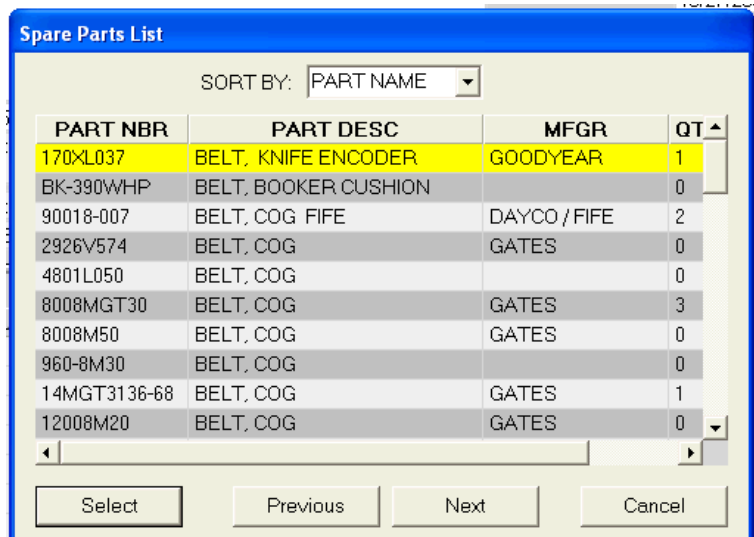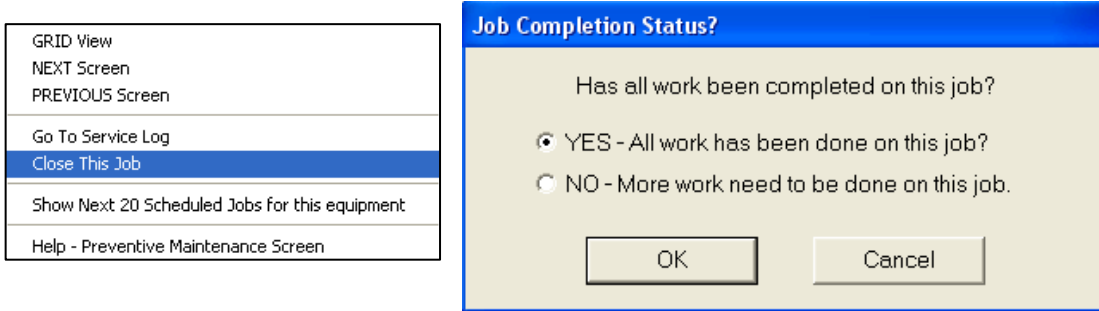
Printing Work Tickets to Screen

Work Tickets can now be printed to screen
and then to a printer or emailed. To print, click 'OUTPUT TO' and select Screen. The Work Tickets will be displayed in an Adobe PDF Reader window that can be printed or emailed.
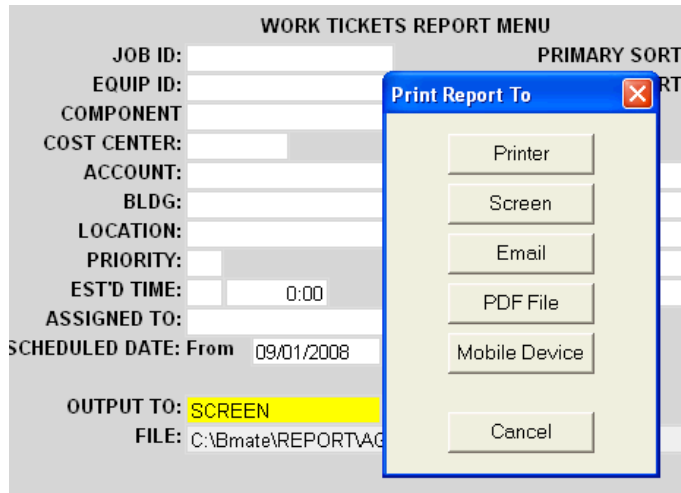
Closing Jobs from a PM, TC or WO Screen

Jobs can be closed starting from any PM, TC or WO screen by right-clicking the screen to display the popup menu and selecting Close this Job. Benchmate then jumps to the Service Log screen and asked if the work is done (just as if you had selected F12 Close in the Service Log). Proceed to enter data into the Service Log and close. PM jobs will be rescheduled and TC or WO jobs will be marked DONE.

| GRID View |
| NEXT Screen |
| PREVIOUS Screen |
| Go To Service Log |
| Close This Job |
| Show Next 20 Scheduled Jobs for this equipment |
| Help - Preventive Maintenance Screen |

Job Completion Status?

Has all work been completed on this job?

⦿ YES - All work has been done on this job?

○ NO - More work need to be done on this job.

[OK]   [Cancel]

Caution – Use Passwords to who can use this technique. While this technique can save keystrokes, inexperienced users can inadvertently close a PM job multiple times and not realize the PM has been rescheduled. Password permissions should be used to control access to this feature. Three password permissions are required:

1. View permission for the PM, TC or WO screen and
2. View permission for the Service Log screen and
3. Close Job permission.

We suggest you disable Close Job permission or deny permission to view the PM screen for all users except those authorized to close jobs.

PM, etc from EQUIP screen

Creating and Viewing Jobs from the Equipment Screen

The Equipment screen is a 'jumping off' point for many Benchmate users. For example, a technician might want to check recent maintenance activity or other details before creating a Work Order or Trouble Call or starting to work on the equipment.

For example, to create a maintenance request while viewing an Equipment Screen, 'Right Click' to view the pop-up menu and select Write New Trouble Call.
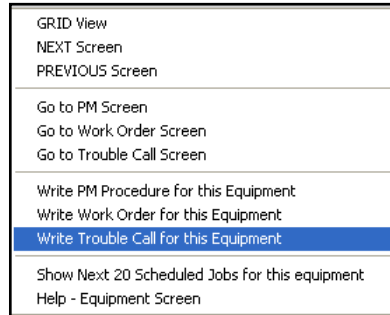
Left click the selection to open the Trouble Call screen with the equipment information inserted.
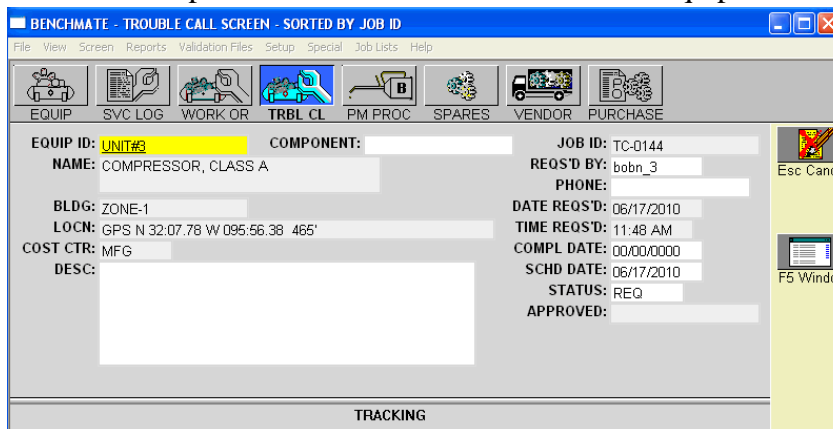
You can also 'right click' to view PM, TC or WO jobs or to view the Next 20 scheduled jobs for the equipment.

'One Click' Job Lists

'One Click' Job Lists are a quick way to view:

1. New Maintenance Requests (Trouble Calls),
2. Recent Service Log Activity (for supervisors to review)
3. Critical Jobs (you set criteria based on priority and number of days before or after SCHEDULED DATE.

All lists provide link to the associated PM, TC or WO screen.

New Trouble Calls

	REQD DATE	TOD	REQ BY	COST CTR	BLDG	EQUIP ID	JOB ID	
1	06/17/2010	11:48 AM	bobn_3	MFG	ZONE-1	UNIT#3	TC-0144	
2	05/25/2010	5:39 PM	bobn_3	MFG	ZONE-1	UNIT#1	TC-0143	testing UNIT#1
3	05/25/2010	5:29 PM	bobn_3		ZONE 4	CT-10	TC-0142	testing ct-10 @
4	02/22/2010	6:50 PM	bobn_3		ZONE 4	CT-13	TC-0138	testing on 2/22
5	02/22/2010	6:50 PM	bobn_3		ZONE 2	GEN-1003	TC-0141	testing on 2/22
6								

New Maintenance Requests

Recent Service Log Activity

	CHKD?	COMPL DATE	JOBID	DESC	EQUIP ID	ATTN?	CAUSE	SHOP
6		00/00/0000	PM-0010	ANNUAL PM, COMPRESSOR CLASS A	UNIT#1		4	
7		00/00/0000	PM-0113-AA	OIL CHANGE	UNIT#1	N	MECH	
8		00/00/0000	RE-0174	SPECIAL REQUEST JOB NOT FINISHED!!	CT-16A	N		

Recent Service Log Activity

Currently scheduled CRITICAL jobs

	JOBID	DESC	DATE	P	SHOP
1	TC-0142	testing ct-10 @	05/25/2010	0	
2					

Critical Jobs

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