

# Mini CMMS System

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## Introduction

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This document is prepared to describe using of Mini CMMS, the system support record Assets, PMs for Asset and the related Work order.

## Basic Information

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**Software Creator:** Microsoft Access 2016, expected to work on other following revisions of Access.

**App Structure:** Application was created using two separate Access files, the application file (CMMS\_Rxx\_y.accd) and data file (CMMS\_Data.accd). To keep user data privacy, the user can migrate his/her data to the data file, while a new revision of application data can be sent.

### Running App:

- Install Microsoft Access.
- Put the application, and the data file both in the folder, double click app file. The application will search for data file and creates a link to data file. Therefore, user can put both file on any folder as his/her choice.

## Using Mini CMMS

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**Main Menu:** At startup user will see app main form (main menu) in which you have access to all app features.

**Assets:** Press on Asset key in main menu, to Add, Edit or delete an asset. You cannot delete an asset, which has related work order, if there an asset which is not used, you can change its status to "Inactive".

**PM:** In this form you need to add information for the schedule work orders. You need to put basic information to work.

- Status: Normally "Active" if PM is not used put "In-active".
- Frequency in Days: for example put 1, this will create WO every day, 7 every week, and 365 every year.
- Start Date: Put the date in which the PM will start to work, example one PM will create Work orders from next 10 Dec. 2021. Other will start create Work order in the next 10 Jul. 2021.
- End Date: this date is set by system, it record the last due date for the work order created using this PM item.
- Activities: This is the list of activities that will be copied to related WO.
- Others: Asset : the asset the use this PM, PM label: Optional name for PM, use coding system of your company.

**Work Orders:** This is the main module, every WO has

- Type: CM, PM, IM, and PDM. Users cannot create PM manually, only PM item creates PM work orders.
- Status: WO starts with Open, then "In-Progress". if work cannot be done, user will put WO in "Hold". And when job finished it is put in "Close".

- Date: Report Date is the date of creation, Schedule date is the estimated date to start work, Start Date is the actual start date, End date is closing date.
- Others: there Comments, Activities, and linked photo after finishing the job.

## Understating work order module

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- If you select CLOSE with blank close date, system put close date as current Date/time for you.
- if you put close date, system change statue to CLOSE.
- to reopen work order in CLOSE, set close date as blank and change statue to OPEN
- If you select In-Prog with blank start date, system set start date as the current Date/time for you.

## Understating PM module

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- Care when migrating data to application, check the that asset code (assCode) in PM table (tblPM) is found in Asset Table (tblAsset - field assCode).
- You need to ask PM module to create work orders for the scheduled jobs (work orders), normally this is done weekly or as your organization rules.
- Start create PM
  - Go to Main Menu form - click PM Button to enter the required data, the most important is Asset code, Start Date, Frequency.
  - Optionally apply a filter to PMs, to have the list of PMs you need. if you are in record view system will consider only the shown PM shown.
  - Click button **Create WO from PMs**, in the dialog box set date (example date for end of next week/month), or number of days from today up to end of next week/month. App will show number of days if you enter date, and vice versa.
  - Click Apply button, system report number of created WOs.
  - Application will not create WOs for PM with status "inactive".
  - Application will not create WOs twice for the same PM, application know that by recording the date of last created PM (End Date).
  - If PM reported, zero WO created, check today date + number of days given as above, with PM end date. if end date is higher than no PM created, the same if start date + frequency has no linked time frame with end date + frequency.
  - If you are in list view, click (Create WO PMs) all PMs will be used .
    - If you are in list view, and you selected some filter (from Ribbon). click (Create WO PMs) only the show PM with the current filter ONLY will be considered.
    - If you are in record view, click (Create WO PMs) only the show PM will be considered.
  - PM saves Reported date as date and time (before was date only).
  - Prevent PM from creating WO in date/time before the current date/time.

## KPI

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- Set the date limit in main menu.
- Click Update.

## Mini CMMS Reports

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The following reports is created from main menu:-

- Work order in Status "Open".
- Work order in Status "In-Prog".
- Work order in Status "Hold".
- Work order delayed for work type "BD".
- Work order delayed for work type "PM".
- Since When report: show delayed WO grouped by delay period (3 years, one year, six months, 3 months).
- Also other tools:-
  - PM Chart: show the activities of PM in Matrix form in one month.
  - Asset History: create report of work order based on one asset (or all ) with option to filter by work description, dates, work status, work type.
  - Work order Report Creator: create any report based on any filter you supply.