



“I’ve downloaded the demo. Can you help me make sense of what I see?”

Sure. Here’s how I’m going to do it:

- 1) The ‘Yellow Pad’ scenario
- 2) Main Guide Screen View
- 3) Control Panel View
- 4) Using sample data and ‘ScreenHelp’
- 5) Entering your own data

Prior to this walk thru, I would strongly suggest that you view the “[Demo Video](#)” on our web site (www.imonitsoftware.com) and print the “[I’mOnIt! QuickStart Guide](#)” found under the ‘support’ tab at that site. Also remember, when you’re in **I’mOnIt!**, Press <F1> and the entire User Manual is available to answer your questions.

- 1) First let’s think of the maintenance process as if you had only a yellow pad, a calendar, a pencil and your lifetime of knowledge as to what is in your shop and what you have to do to keep it running.

You would probably list all your equipment on the yellow pad and group it by ‘like’ equipment. (we say **Fixed Assets**, each belongs to a **Class**) Then on another set of sheets you would write down the work that needs to be done, (**Job**), on each piece of equipment at various points in the equipment’s ‘life’ and match them together. Then, on the calendar, you would ‘pencil in’ each equipment/job combination on each date that it came due (**Task**). But wait, today you might not know what is due, because you don’t know the usage of the equipment. You have to check that first. And by tomorrow, of course, things have changed. Hey, this gets complicated quickly. I need a helper.

- 2) *I'mOnIt!* keeps track of all of the items involved and organizes the tools at your disposal on the Guide Screen.

The screenshot displays the 'I'mOnIt!' software interface, organized into several functional sections:

- Items To Be Worked On:**
 - Class A Grouping of Fixed Assets:** A feature for grouping similar fixed assets (FA's) into a class to define a job one time, which then automatically applies to all items in that class.
 - Fixed Assets (FA):** A section for managing items to be worked on, such as vehicles, machinery, buildings, and personnel.
 - Parts:** A section for tracking quantities and costs, allowing users to assign parts or labor to jobs and automatically deduct usage and report quantities and costs.
- Who Does The Work:**
 - Technicians:** A section for managing technicians, where users can enter names and email addresses to assign work.
- What Will Be Done:**
 - Jobs:** A section for defining work steps and documents to get a job done. It includes buttons for 'Create ClassWide Job', 'Create Standard Job', and 'Edit Existing Job'.
- Today's Work:**
 - Control Panel:** Described as 'Your Command Center for Maintenance', this panel reports activity and costs, shows tasks due for attention, forecasts requirements, and allows for printing and emailing work orders. It also handles task completion, manual or automatic FA usage capture, and e-mailed work requests.
- After The Work Is Done:**
 - Activity Reports:** A section for selecting tasks and types of reports to print, email, or export to Excel.
 - Export Tasks For Analysis and Spreadsheets:** A section for selecting and exporting task data to Excel for customized analysis.
 - Export Parts Update your Inventory System:** A section for exporting parts usage to Excel for analysis or inventory system updates.
- Navigation and Settings:**
 - Buttons for 'System Settings', 'Printer Settings', and 'Help' are located at the bottom left.
 - An 'Exit I'mOnIt!' button is located at the bottom right.

The Sample data is from the operations of Nottingham Foods Inc. so let's Click on the 'Control Panel' icon and see what's happening today. (Note: an the Sample date organization is described in an Appendix in the User Manual, just Press <F1>)

3) The Control Panel lets us work with the items that demand attention (Tasks)

Each Line on the Control Panel is a Task (in our paper example, it is what you marked on the Calendar). A Task appears on the Control Panel when, based on your set-up and equipment use, it is time for some action. It will show...

Fixed Asset the Equipment to be worked on
Job Name the Work to be done
Technician who is assigned to do it
Due Dt the date that it became due based on how you determined its 'need'. (Calendar based, Hours of use, mileage, etc.)
Status This shows you where it stands in the cycle of:
 Notifying that it needs to be done (Status = OPEN)
 Work has been assigned (Status = WO)
 Work has been completed (The line disappears)

Color Legend
 One Time Job
 Warranty Job
 Demand Job
 High Priority
 Low Priority

The "Freshness" Icons help you see at a glance, how 'old' the Task is

Select the line(s) you want to work on

Clicking helps you prioritize your work

Click in 'Select' Column for 1 Task, Right Click to Select Multiple. Click Column Title to Sort

Fixed Asset Information Print Work Order Enter Costs Reports
 Job Info Task Costs E-Mail Work Order Consumption Forecast Tasks
 Task Information Complete Task Automate Consumption Forecast Materials
 Task Parts Cancel Task Set Filter Check Email Exit

These Buttons let you Drive the Process

Please look at the "Call outs" to get a feel for what the Control Panel is displaying

- 4) You can get a good feel for 'efficient' data organization by navigating through the Sample data. Let's take a look at how to maneuver around the system and take advantage of *I'mOnIt!*'s awesome Screen Help feature.

In the following screenshot, you will see that we 'Checked' a line item, (a **Task**) "DriveGuardSafetyCheck" and Clicked the [Fixed Asset Information] button to see more about the piece of equipment (**Fixed Asset**) that this Task is scheduled to be performed on.

Fixed Asset Information

FA# Line1_Conveyor
 Make Olson
 Descrip Conveyor 1
 Licsn#
 Registr
 Model CV24
 Serial # 746e 895
 Tag 1 Cost Group 1
 Tag 2
 Tag 3
 Tag 4

Select	Fixed Asset	Job Name	Technician	Due Dt	Status
<input type="checkbox"/>	Lift_1228	Forklift Lube	Brandon Burchfield	05-19-09	OPEN
<input type="checkbox"/>	Lift_1231	Forklift Lube	Brandon Burchfield	05-19-09	OPEN
<input type="checkbox"/>	Campus	Health Dept. Sched 128	Janet Lopez	07-10-09	WO
<input type="checkbox"/>	Personnel	Drug Screening	Office Administrator	07-10-09	WO
<input type="checkbox"/>	Campus	Health Dept. Sched 504	Walter Green	07-12-09	WO
<input type="checkbox"/>	Personnel	Drivers License Check	Office Administrator	07-12-09	WO
<input type="checkbox"/>	Campus	Building Maintenance	Facilities Mgmt. Bldg. Crew	07-13-09	OPEN
<input type="checkbox"/>	Delivry_85	Vehicle Registration	Walter Green	06-19-10	OPEN
<input type="checkbox"/>	Delivry_86	Vehicle Registration	Walter Green	06-19-10	WO
<input type="checkbox"/>	Delivry_87	Vehicle Registration	Walter Green	06-19-10	WO
<input type="checkbox"/>	Line2_Chiller	Temperature check	Janet Lopez	07-27-11	WO
<input type="checkbox"/>	Line1_Chiller	Temperature check	Janet Lopez	07-27-11	OPEN
<input type="checkbox"/>	Line3_Chiller	Temperature check	Janet Lopez	07-27-11	WO
<input type="checkbox"/>	Line1_Conveyor	MotorControllerPM1	Walter Green	09-23-11	OPEN
<input checked="" type="checkbox"/>	Line1_Conveyor	DriveGuardSafetyCheck	Brandon Burchfield	09-24-11	OPEN

Click in 'Select' Column for 1 Task, Right Click to Select Multiple. Click Column Title to Sort

Fixed Asset Information Print Work Order Enter Costs Reports
 Job Info Task Costs E-Mail Work Order Enter Consumption Forecast Tasks
 Task Information Complete Task Automate Consumption Forecast Materials
 Task Parts Cancel Task Set Filter Check Email Exit

If we wanted to see the details of this Task (and change them if we cared to), we would Click the [Task Information] button and the Control Panel would display in the Info Panel to the left, six different Task information sections concerning this Task.



“OK, there are lots of Buttons and Options but only so many hours in a day. How do I learn what they do?”

Here’s where *mOnIt!*’s awesome Screen Help feature comes into play.

Click the “Screen Help” option in the *mOnIt!* Top Menu Bar (or Press <F1>) and the context sensitive Help will be displayed in its own window. This window will present the Help Topic that is pertinent to your screen focus but will also allow you to navigate to any Help Topic.

The screenshot shows the I'mOnIt! software interface. At the top, the menu bar includes 'File', 'Control Panel', 'Parts Maintenance', 'Reports', 'Export', 'Screen Help', 'More Help', 'Show or Hide Guide Screen', and 'Exit'. The 'Screen Help' option is circled in blue. Below the menu bar, there are status indicators: 'Select All', 'Select None', 'Current', '1.7 Days Overdue', '> 7 Days Overdue', and 'Upcoming'. A table displays work order data:

Select	Fixed Asset	Job Name	Technician	Due Dt	Status
<input type="checkbox"/>	Campus	Building Maintenance	Facilities Mgmt. Bldg. Crew	02-07-12	OPEN
<input type="checkbox"/>	Campus	Health Dept. Sched 128	Janet Lopez	03-14-12	OPEN

The 'Task Information' help window is open, showing a 'Contents' list on the left and a 'Task Information' section on the right. The 'Task Information' section contains the following text:

Task Information Button
 You can 'Search' Help topics or Click the Topic you desire

Task Information Presents a panel that allows you to view and make changes to 6 different "sections" of Task Information. Changes made to any of these "sections" apply just to the Task that is checkmarked as Selected on the **Task List**

The "Work Order Notes" section displays notes that print on the Work Order. This is where work steps are printed, and personnel can be written here for, can be stored and passed on. These notes are a 'photocopy' of the notes that were set for the Job. The manager may want to edit or include additional comments based on the particulars of the current situation.

The "Work Order Documents" section displays files like pictures, documents, spread sheets etc. that you associate with this Task. These documents will be e-mailed as attachments to the Work Order, (if the W/O is emailed).

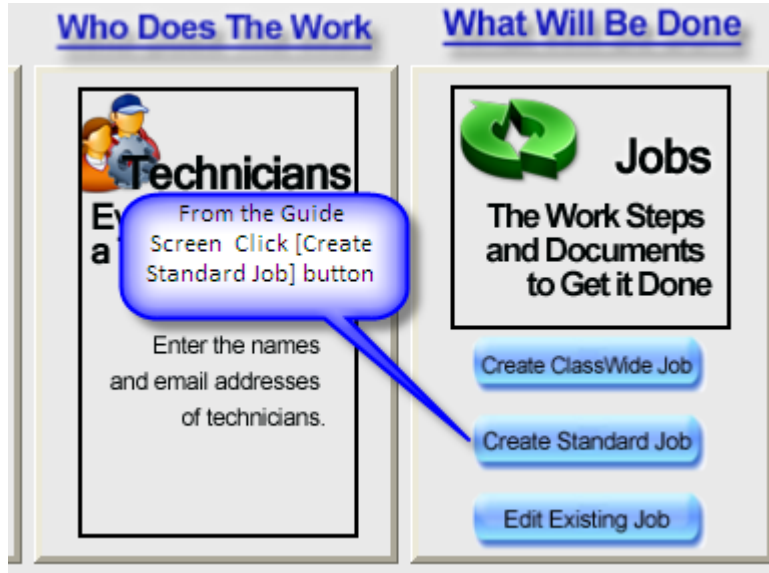
The "Work Order E-mail Addresses" section displays the

Callouts in the image point to the 'Screen Help' menu option, the 'Task Information' button in the main interface, and the 'Task Information' section in the help window.

So, cruise around the sample data. Do you have a question? If so click the 'Screen Help' option from the Top Menu Bar and you'll have your answer! Do this until you have the familiarity with the system that you want, then let's move on to see how we setup a new Job for one of our Fixed Assets.

Please note that the Quick Start Guide and the Help Manual (also available on our website as a download) will walk you thru the system setup (noting that you need to setup the System Master, and have at least 1 Technician and 1 Class, before setting up Fixed Assets and Jobs

5) Entering your own data (let's add a new Job to an existing Fixed Asset)



Now scroll to the piece of equipment that you need to service. Clicking the [Select] Button will bring-up that piece of equipment

Lift_1236	88372366344	Pallet mover #1236	
Line1_Chiller	999783647237	Chiller 1	
Line1_Conveyor	746e 895	Conveyor 1	
Line2_Blender	SM8874746	Blender 2	
Line2_Conveyor	4562e 9987	Conveyor 2	
Line3_Chiller	9998373563	Chiller 3	
Main Plant Bldg		126 Nottingham Drive	
Personnel		General Personnel Repository	
Warehouse 1		128 Nottingham Drive	
Warehouse 2		130 Nottingham Drive	

Click in a Column to Sort By That Column

This is the Fixed Asset that we want to work on, so we Click the New Job button

* - Denotes a Required Field

FA# * Line1_Conveyor

Class * Conveyors - 2001

License #

Serial # 746e 895

Registration

Description Conveyor 1

Year 2002

Make Olson

Model CV24

Demand Job Technician Janet Lopez

Demand Job Notification

Separate Multiple Addresses with a ';' - john@xyz.com,mike@xyz.com...

Notes

Documents

There are a few ways to create a Job
'Manual Entry' has us input all of the information
'Copy From Template' lets us use another Job (to reduce input)
'Immediate Job' is a short-cut for an ad hoc request

Creating a Job? Choose Method

Manual Entry

Copy From Template

Immediate Job

Of the two screenshots that follow, the 1st is how the initial screen is presented. And the 2nd is after it has been completed with our new job data.

Add Job For A Fixed Asset

Info: CLASS: 2001 - Conveyors
FA#:Line1_Conveyor -Conveyor 1

Job Type

OneTime Job Due Date
 Quick Job Completed Date
 Warranty Job Due Date

March 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: 03-28-2012
Selected Dt: 03-28-2012

Click the Add Documents button to save external documents for e-mailing with the work order after the Job is Added

*** - Denotes a Required Field**

Job # * 2109
Job Name *
Priority Normal
Description
Notes
Email Completed Task Notification
Technician *
Consumption * ByCalendar
AutoEmail W/O
Forecast Y
Follow Up Days

Cancel Save Delete Exit

The completed screen.

The screenshot shows a software window titled "Add Job For A Fixed Asset" with a menu bar (File, Control Panel, Parts Maintenance, Reports, Export, Screen Help, More Help, Show or Hide Guide Screen, Exit). The main window displays "Info: CLASS: 2001 - Conveyors" and "FA#:Line1_Conveyor -Conveyor 1". A "Calendar Based Job Schedule" pop-up window is open, showing scheduling options. The pop-up includes a list of frequency options (Every Day, Mon-Fri Only, Selected Days of Week, Selected Days of Month, Every X Days, Every X Weeks, Weekly By Week of Month, Monthly By Day of Week, Monthly By Date) and a "Select Day(s) of Month" grid where day 10 is selected. A checkbox for "Schedule tasks on Saturday and Sunday" is checked. A text box explains: "A task will be scheduled on selected dates each month. If 'Schedule tasks on Saturday and Sunday' is checked, tasks that would fall on a weekend will NOT be scheduled." Buttons for "Delete", "Cancel", and "Save" are at the bottom of the pop-up. The main window shows a "Required Field" section with "Job # * 2109", "Name * AdjustBeltTension", "Priority Normal", and "Description The Manufacturer recommended procedure for this unit". A "Notes" field contains text about a recent class. Other fields include "Email Completed", "Task Identification", "Technician * Janet Lopez", "Consumption * ByCalendar", and "Type * ByCalendar". A date field shows "03-28-2012". A "Follow Up Days" field is empty. At the bottom of the main window are navigation buttons: "Cancel", "Save", "Delete", and "Exit". Three blue callout boxes provide instructions: 1) "This Date Selector Pane' will Pop-up when 'ByCalendar' 'Consumption Type' is chosen", 2) "This Pop-up must be 'completed' with the 'Save' or 'Cancel' button before main process is 'Saved'", and 3) "Click 'Save' to complete process".

Click 'Exit' Button to return to the Guide Screen

Info:

Class #: 2001 - Conveyors
Desc: Olson Conveyor Assembly
FA#: Line1_Conveyor
Desc: Conveyor 1

* - Denotes a Required Field

Browse Type

Browsing 59 job records
Current Job Type
Scheduled

Job # * 2114

Job Name * AdjustBeltTension **Priority** Normal

Description The Manufacturer recommended procedure for this unit

Notes 8/11 Ehrick has been to a recent class for this and his notes are in with the packet inside the access cubby.

Email Completed Task Notification Separate Multiple Addresses with a ";" - john@xyz.com,mike@xyz.com...

Technician * Janet Lopez AutoEmail W/O **Forecast** Y

Consumption * ByCalendar Left Click for Display of Schedule
Right Click to Change

Last Cmplt * 09-24-2011 ByCalendar **Follow Up Days**
Lead Days

Work Order Documents

There are no items to show in this folder.

Inventory Preview W/O Add Documents Cancel Save Delete **Exit**

Some interesting Side Notes

The screenshot shows the mOnIt! software interface with a form for equipment management. The form includes fields for FA#, Class, License #, Serial #, Registration, Description, Year, Make, Model, Demand Job Technician, Demand Job Notification, Notes, and Documents. There are also checkboxes for 'Disable Automated Consumption' and 'Disable Job Scheduling', and a 'Current Consumption Values' section with a table for hours. A 'Maintain Tag Values' section has dropdown menus for Tag 1-4 and checkboxes for 'Print On Work Order'. At the bottom, there are navigation buttons: Add, Cancel, Save, Delete, and Exit (circled in red), along with a 'Report Activity' button.

*** - Denotes a Required Field**

FA# * Line1_Conveyor
Class * Conveyors - 2001
License #
Serial # 746e 895
Registration
Description Conveyor 1
Year 2002
Make Olson
Model CV24
Demand Job Technician Janet Lopez
Demand Job Notification
Notes
Documents assembly_manual.pdf conveyor.jpg

Disable Automated Consumption
 Disable Job Scheduling
Operator
Current Consumption Values
ByCalendar Cons Not Entered for By Cal. Chg
hours 678
0
0

Tag 1 Cost Group 1
Tag 2
Tag 3
Tag 4

Print On Work Order
 Print On Work Order
 Print On Work Order
 Print On Work Order

Maintain Tag Values

Separate Multiple Addresses with a ";" - john@xyz.com;mike@xyz.com

Side Note: This equipment has some Jobs that are triggered by hours of use

Side Note: 'Tags' are used to group Fixed Assets any desired way & can be printed on the Work Order

Side Note: This Maintenance Manager has stored the manuals electronically on the system for easy access and distribution. You can too!

Add Documents

Report Activity

Add Cancel Save Delete **Exit**

That's it! Don't be shy to try things out in the Free Trial with the Sample data. It's the quickest way to see all that ***mOnIt!*** can do for your operations.