ZUD Quick Referene Guide: 7/18/10

All Actions in this guide assume a starting point of the Main Menu.
All Bold items are the command buttons to click.

Add Documentation, and Vendors

I. PROGRAM SETUP/ADMINISTRATIVE

NOTE: Quick Reference Guide is still in DRAFT status, check www.mymemberdata.com for updates

a) LOG IN:

The file that opens the program is **C:\ZUD\ZUD.mde**. Open this file to load the log on form.

NOTE: You can create a shortcut to this file on the desktop

The default **User ID** is: Admin, type this in the user id field and press enter on your keyboard.
The default **Password** is: Super, type this in the password field and press enter, the Main Menu will load.

NOTE: Neither the user ID or password is case sensitive

After Logging in you can also go to **Org Info/Program Setup**, then check the box to Enable Auto Log In, this will provide a button off to the side of the Log On form that you click to immediately open the program with full rights. This feature should ONLY be used with a Single User on a Single PC configuration.

At the Main Menu, Contacts should be added first, you can use the **Add Contact/Member** Button to add contacts or you can click **Businesses** to add your business contacts (If a member be sure to click the Member checkbox for that contact). You can close when adding businesses is complete and repeat with individuals by click the **Individuals** button. Note with individuals you can also affiliate them with the Businesses entered.

Once you have your contacts entered, you can move on to the Setup Checklist, form the Main Menu, click the Org/Program Setup located in the upper right

b) Data Backup:

The most important file in the program is ZUDData.mdb, this file should be copied to another media such as a flash drive, external hard drive, another computer or you can zip and email to someone. All other files can be replaced with no loss of data. For a single User program the location of this file will be C:\ZUD folder.

On the log on form is also an automated backup program to zip and upload your data file to PSTcorp's secure ftp server. In a network environment with multiple users, all users MUST be logged out of the program prior to doing a backup. Click **Exit, Open Backup Data Utility**, then Click **Backup Now**.

NOTE: There is a small annual fee to activate this feature, For Clients who utilize the autoweb update feature, this is included in that fee. Visit www.mymemberdata.com for current pricing.

c) Administrative:

Administration, *A definition for each command is presented here*

Users' Logged On, *View current users logged on, use before performing any program maintenance.*
Employee List, *for add/edit employees, set security, log training classes.*
Property/Project List, *Add/Edit projects and properties, can also be assigned to tasks*
Equipment Categories, User defined Categories for Equipment
Equipment Keywords, *User defined Keywords for Equipment Grouping*
Equipment Status *Equipment Status (broke, operational, etc.) for assignment to equipment*
Task Types, *Define the task type for assignment when creating new tasks*
Media Types, *For categorizing various media for equipment*
Facility Locations, *A listing of Physical Locations for equipment assignment*
Inventory Locations, *Enter locations where inventory items are kept.*
Units of Measure, *A list of used for PM data gathering*
Symptom Codes, *Codes grouped by Equipment Keyword for assignment to Repair Work Orders*
Failure Codes, *Codes grouped by Equipment Keyword for assignment to Repair Work Orders*
Action Codes, *Codes grouped by Equipment Keyword for assignment to Repair Work Orders*
Cause Codes, *Codes for assignment to Repair Work Orders*

II. EQUIPMENT/LOCATIONS

a) Add:

Equipment
Add New, *Enter the data for the equipment or Location*
Close *to return to the master equipment list*
Close *to return to the Main Menu*

b) Edit:

Equipment, *Find and Select the Equipment/Location desired*
Equipment Detail, *Edit the information desired*
Close *to return to the master equipment list*
Close *to return to the Main Menu*

c) Preventive Maintenance Tasks:

Equipment, *Find and Select the Location/Location desired*
Equipment Detail,
Attach PM's/Cals, *IF the list is blank click* **Add New Master Listing;** *Enter the Preventive Maintenance Task (i.e. Change Oil) Click* ***Close****.*
Find and select the PM task to add
Attach to Equipment*, Enter the detail data for this PM as it relates to the Equipment/Location Selected*

NOTES*: This PM task will automatically be created within 30 days of its next due date (determined by date last done and frequency in days).*

Close *to return to the Equipment/location detail*
Close *to return to the master equipment list*
Close *to return to the Main Menu*

d) Spare Parts:

Equipment, *Find and Select the Equipment/Location desired*
Equipment Detail,
Attach Spares, *IF the list is blank click* **Add New Item,** *Enter the Inventory Detail (i.e. Battery) Click* ***Close****.*
Find and select the spare part from inventory to add
Attach to Equipment*, Click* **OK** *to the message the item has been attached*
Close *to return to the Equipment/location detail*
Close *to return to the master equipment list*
Close *to return to the Main Menu*

III. INVENTORY

a) Add:

Inventory
Add New; *Enter the data for the inventory item*
Close *to return to the inventory screen list*
Close *to return to the Main Menu*

b) Edit:

Inventory, *Find and Select the inventory item desired*
Item Detail, *Edit the information desired*
Close *to return to the inventory screen list*
Close *to return to the Main Menu*

c) Find

NOTES: *Primary and Secondary Keywords can be assigned to inventory items to aid in finding them on the master inventory list. A primary keyword may be battery with a secondary keyword of 9 volt.*

Inventory, Select *a Primary Keyword, all matching records are displayed***,**
Select *a Secondary Keyword (Associated with Primary) and the list can be further limited*
Item Detail, *Edit the information desired*
Close *to return to the inventory screen list*
Close *to return to the Main Menu*

d) Request/Issue Parts

REQUEST:

NOTES: *There are 2 ways to request a part prior to issue.*

From the Inventory Master:

Inventory Master, Find and Select the part desired
Request Part, enter the Quantity, then click OK

From Task Detail:

Open Tasks, *Find and select the task the part is needed for*
Task Detail/Data Entry
View/Request Part, *find and select the part desired*

NOTES: *The default is to show the parts associated with the Equipment IF the equipment is assigned to this work order, if this is a non equipment work order, click the* **View All Active Parts** *Button prior to request.*

Request Part, *Enter Quantity and Press* **OK**

ISSUE:

Issue Parts, *Select and pull the part to issue*
Issue Selected Part
Close *to return to the Main Menu*

e) Receive Parts

NOTES: *There are 2 ways for parts to appear in the Receive Parts form.*

On Order: *(These parts will also appear in the Purchase Order Report in the Reports Menu)*

Inventory Master, *Find and Select the part desired*
Order Part, enter the Quantity, and then click **OK**

A work order return:

Open Tasks, *Find and select the task the part is needed for*
Task Detail/Data Entry
View Parts Issues, *find and select the part desired*
Return Part to Stock, *Enter Quantity and Press* **OK**

To RECEIVE:

Receive Parts; *Select the part that is to be stocked*
Receive/Update Quantities
Close *to return to the Main Menu*

NOTES: *For parts returned not related to a work order, simply go to the inventory master and select* **Update Quantities**.

IV. PM Master List

a) Add New Master:

PM Master
PM Master Description List, *Go to the last record (Autonumber in ID field) and enter the new PM that can be applied to many equipments*
Close *to return to Master PM List*
Close *to return to the Main Menu*

b) View Status:

PM Master *View the status of each PM and the equipment it is assigned to. Note, PM's set that are not assigned to equipment will not appear in this list. These would be PM's setup via the Repeat Work Order Function. These may be view by clicking* **Open Tasks***, then click*
Close *to return to the Main Menu*

c) De-Activate:

PM Master *Click the Active Checkbox to off (the first checkbox)*
Close *to return to the Main Menu*

V. DOCUMENTATION

a) Add New:

Documentation, *Go to the last record and enter the new Documentation, note that you can also assign this documentation or media to either and inventory item (i.e. spec sheet) or equipment (i.e. software or manual)*
Close *to return to the Main Menu*

b) Change Log:

Documentation
Change Log, *Enter a description of the change to the media or documentation, an excellent configuration management tool*
Close *to return to the Documentation List*
Close *to return to the Main Menu*

VI. VENDORS

<u>a) Add</u>:

Vendors
Add New Vendor, *Enter the data for the Vendor*
Close *to return to the Vendor Master list*
Close *to return to the Main Menu*

<u>b) View/Edit</u>:

Vendors, *find and select the Vendor desired*
Vendor Details, *Enter the data for the Vendor*
Close *to return to the Vendor Master List*
Close *to return to the Main Menu*

<u>c) Communication Log</u>:

Vendors, *find and select the Vendor desired*
Comm Log, *Enter data about the communication*
Close *to return to the Vendor list*
Close *to return to the Main Menu*

VII. TASK MANAGEMENT

a) Add Task:

Enter New Task, *Enter data related to the task, Note that you can:*

Repeat a task periodically; See Create PM Tasks in the next section.

Close *to return to the task list*
Refresh Data *to see the task just created,* **Close** *to return to the Main Menu*

b) Create PM Tasks

Tasks
Create PM Tasks *This function will automatically create open tasks based on PM tasks and Repeat Tasks due within the next 30 days. They will appear on the open tasks list.*

c) Edit Task

Open Tasks, *Find and select the task desired*
Task Detail/Data Entry, *Enter data related to the task*
Close *to return to the task list*
Close *to return to the Main Menu*

d) Request Parts

Open Tasks, *Find and select the task desired*
Task Detail/Data Entry, *Enter data related to the task*
Close *to return to the task list*
Close *to return to the Main Menu*

e) Complete Task:

Open Tasks, *Find and select the task desired*
Task Detail/Data Entry, *Enter date closed, closed by and then set the closed checkbox to ON*
Close *to return to the task list*
Close *to return to the Main Menu*

VIII. REPORTS

a) Reports:

Reports

Maint Info Status, *A list of all Top Level Equipment status (Up or Down for Repair/PM)*
DT-Last 24 Hours, *Total Downtime hours from Work orders the last 24 hours*
Open PM's, *A list of Open PM's that have not yet closed*
Open Non-PM's, *Non PM (Repair/Project/etc) that are open*
Spares to Order, *A list of spares whose qty on hand has fallen below the minimum level*
Purch. Report, *A list of parts with a quantity in the On Order field, lists Vendors also*
PM Time Est., *A list of PM's open and estimated time to complete*
PM's Due this Week, *A list of open PM's with a due date in the current week*
4 Week PM forecast, *A time estimate of PM's due in the next 4 weeks*
PM Performance, *Shows the percentage of PM's complete by their due date*
SPC Reports/Charts, *Turn the Check ox to OFF for those reports you do not want*

There are several SPC Reports based on time period and Equipment. It is imperative that any equipment that an SPC report is desired be flagged as Top Level Equipment (See Equipment Detail Page Checkbox at the top of this form)..

Select the time period, The last 3, 6, 9, or 12 months.
Select the equipment desired
Select the Report Desired

Action Codes Used
Total Work Orders by Type
Cause Codes Used
Failure Codes used
Top 8 Equipment Hitters
Symptom Codes Used
Labor Hours
Equipment Downtime Hours by Month
Top Action Codes Used
Top Failure Codes Used
Top Symptom Codes Used
Top Cause Codes Used
Equipment MTBF

NOTES: *Analysis of a combination of the above reports will provide the organization with the data needed to eliminate unscheduled downtime. This process of elimination may result in tasks to increase PM frequency, provide operator training, or as last resort equipment re-design..*

Preview *to view the report prior to printing.*
Close to return to the Reports Menu or Print to Print the report.
Close *to return to the Main Menu.*

Product Code: ZUD

ZUD (cmms) user materials were designed for *ZUD (cmms)* software running on an IBM compatible personal computer with Microsoft Access 2000, 2002 (XP), 2003 or 2007. The software was designed to run standalone or in a multiple user configuration on a network.

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