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Guide to Using the Demonstration Version of

# ToolTime



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*Quality Software With Your Needs In Mind*

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# Overview

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## Introduction

Welcome to the User's Guide for the Demonstration Version of ToolTime. This document will assist you in getting started and previewing the many useful features available in the full version of ToolTime.

The Demonstration Version of ToolTime allows you to enter a limited amount of information, with restrictions on the number of records allowed in all tables. The security system in the demonstration version is entirely active, so you can alter those settings (with a limited number of authorization codes.) Though this printed guide is a smaller version of the full system documentation, the demonstration version does contain the text of the full manual as an online help system.

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## What is ToolTime...?

Welcome to ToolTime, a Windows-based, computerized maintenance management system from Dixon Creek Software. Over 17 years of experience in developing and enhancing facility information management software for clients around the world has gone into the making of this package. ToolTime is the result of our goal to help our clients maintain their facilities efficiently and affordably. It offers affordable maintenance cost tracking and reporting features that can efficiently maintain virtually any equipment or facility.

We have all heard it: Keep costs down... increase productivity... decrease equipment downtime... Unfortunately, it's not easy accomplishing these objectives while managing a facility day-to-day. There is good news, however. ToolTime can help you track costs and other valuable information related to any equipment maintenance.

Unlike most maintenance management programs, ToolTime allows creation and editing of corrective, or unscheduled work orders from a single screen. No paging through screen after screen to create, edit or close a work order. ToolTime's point-and-click interface makes it easy to enter information anywhere on the screen. And with customized security levels available to individual users, the possibility of unauthorized access to maintenance data is minimal.

It is no secret that the key to any successful maintenance program is preventive maintenance (PM). Scheduling and performing PM tasks as recommended by the manufacturer will not only keep equipment operating at its peak, but will, in many cases, sustain the manufacturer's warranty. ToolTime allows easy scheduling, updating and tracking of an unlimited number of pre-defined PM tasks that you create! Groups of completed PM tasks can be updated simultaneously with ToolTime's PM Search Closure capability.

Every equipment item has specific information associated with it. For example, a motor has nameplate information such as horsepower, voltage, and serial number, while a manhole has size, depth and elevation information. ToolTime comes with 30 easy to edit, pre-defined nameplates for popular equipment items such as motors, pumps, and boilers. And you don't have to settle for inadequate equipment information forms – you can design a custom nameplate yourself for *any* piece of equipment.

ToolTime allows for tracking of parts inventory location, ID number, cost and audit trails. Parts availability and checkout are automatically performed at the work order level. Parts can even be assigned to individual employees as well as by work order. If a part is not used during repair of equipment, it can easily be re-stocked and accounted for in the system. ToolTime makes handling parts a snap.

ToolTime comes with over 70 pre-designed reports, plus a menu selection to optionally launch custom reports. With your choice of many popular custom report generators, you can customize reports for any type of data in ToolTime.

ToolTime provides some of the most flexible and powerful sorting and filtering capabilities available. Virtually any information can be sorted and filtered by any combination of ID number, location, ID pattern (including wild cards), work order title phrase, craft code, text search phrase, priority, date range and three user-defined fields.

Because ToolTime operates in the Microsoft Windows environment, all the popular graphics interface features can be used such as cut, copy, and paste. And since ToolTime uses Microsoft Access as its database, getting the maintenance information is simple with the many popular Windows database manipulation programs and report writers.

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## **Dixon Creek Software**

### **Who Are We**

Dixon Creek Software is a small company focused on the needs of the individual client. Specializing in full-service PC-based computer application development, Dixon Creek Software provides assistance in not only application construction, but also systems analysis, installation and support. Our goal is to produce software that suits our client's needs. We want our clients to be satisfied with the software well after final delivery. End-user support is very important at Dixon Creek Software, and we make every attempt to see that our clients are as happy as possible.



# Getting Started

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## Getting Started Overview

This section of the guide will help get you started in using ToolTime. It describes the procedures and requirements for installing the software, along with step-by-step for initial configuration and setup.

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## Installing ToolTime

ToolTime requires the following hardware and software:

- Windows 3.1 or higher, Windows 9x or Windows NT
- 386 or higher (486 recommended)
- 8MB RAM (12MB recommended)
- 15MB hard disk space

***Important Note:*** Make sure that no other Windows programs are running or minimized when you start the ToolTime Setup program. If you use a virus protection program on your computer, override it or turn it off before you run Setup. Setup may not run properly with these programs also running. Once ToolTime has been installed and is working properly, these programs can be reactivated.

## To Install ToolTime with Windows 3.1

1. Start Microsoft Windows. Make sure that the Windows Program Manager is active.
2. Close all applications running in Windows.
3. Insert the ToolTime Demo CD into Drive **D**. *Note: These instructions assume your CD-ROM is drive **D**. If it is not, replace the **d:** in all following instructions with the appropriate drive letter.*
4. From the File menu in the Program Manager, select Run.
5. Type **d:\setup.exe** and click OK. You can also select **setup.exe** on the **d:\** drive by clicking the Browse button.
6. Follow the Setup instructions on the screen. ToolTime should take just a few minutes to install.

## To Install ToolTime with Windows 95/98

1. Start Microsoft Windows 95/98.
2. Close all applications running in Windows 95/98.
7. Insert the ToolTime Demo CD into Drive **D**. *Note: These instructions assume your CD-ROM is drive **D**. If it is not, replace the **d:** in all following instructions with the appropriate drive letter.*
3. Select Start from the Task Bar and then select Run.

4. Type **d:\setup.exe** and click OK. You can also select **setup.exe** on the **d:\** drive by clicking the Browse button.
5. Follow the Setup instructions on the screen. ToolTime should take just a few minutes to install.

Once ToolTime has been installed, a Dixon Creek Software program group will be created in Windows Program Manager containing the standard ToolTime startup icon. The standard icon can be replaced with any icon you choose. However, when minimized, the standard ToolTime icon will be displayed on the Windows desktop. You can move the ToolTime startup icon from the Dixon Creek Software group to any group you like. You can even make multiple copies of the icon and start the program from several different program groups.

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## Setting Up ToolTime

There are a variety of tasks which need to be performed when you first use ToolTime to ensure that everything will function properly. Pay close attention to the steps and instructions listed in this section, because they will make certain that ToolTime is fully prepared for use.

### To Start ToolTime

1. Open the program group in which you installed ToolTime. (The default program group created by Setup is named Dixon Creek Software. You can create and name your own program group if you wish.)
2. Double-click on the ToolTime program icon. ToolTime should start.

If you are starting ToolTime from a network file server, the program group icon must point to the path on the file server containing the program executable TOOLTIME.EXE. An example is shown below:

M:\SOFTWARE\TOOLTIME\TOOLTIME.EXE

When ToolTime starts, it opens the default database file TOOLTIME.MDB. This Microsoft Access database file is fully structured and configured, but does not contain any data. You must begin entering information to build, or *populate*, the database. The following section describes recommended methods for populating a new database.

## Populating a New Database

Before you begin using ToolTime, you will need to populate the database. This means entering equipment and other maintenance data so that you can begin scheduling maintenance and generating reports.

Populating the database can be a very time consuming process if not executed in an orderly and reasonable fashion. Therefore, care should be taken in collecting and entering information into the database. ToolTime relies on a wide variety of information types in order to properly schedule and report maintenance information. We recommend that you populate the database in a particular order. Doing so will facilitate the entry of remaining data and will familiarize the users with the new program. It is recommended that data be entered into a new database in the following order:

### 1. *Craft Codes*

Craft codes in ToolTime are used as a general description of an employee, PM procedures or work order work completed. This lets you see at a glance what type of work an employee does, or what sort of employee is needed to perform the PM task. Many ToolTime reports allow you to restrict report output by craft code.

## ***2. Suppliers***

Suppliers are businesses which you purchase your parts inventory from. These need to be entered before your inventory and other information is entered, so that suppliers can be assigned to those items.

## ***3. Tools***

Tools within ToolTime can be assigned to various tasks and items. These need to be entered before making equipment and/or inventory items so that they can be assigned to the appropriate places.

## ***4. Locations***

Location codes within ToolTime allow the physical location of an equipment or inventory item to be tracked within the program. This also allows that information to be stored independent of the item's other data, so if the item moves only the location code has to change.

## ***5. Manufacturers***

Manufacturers are companies that make equipment or sub-component items. This information needs to be entered so that it can be assigned to the right items in ToolTime.

## ***6. Employees***

Employees are the people that work in your facility. ToolTime allows you to track their pay, work schedule and task assignments.

## ***7. Parts Inventory***

Parts inventory is used in the maintenance (corrective and/or preventative) of equipment items. These parts can be assigned to employees working on tasks or listed with specific tasks or equipment items. ToolTime also provides facilities for performing blind audit counts as well as budget number tracking. ToolTime automatically deducts parts from inventory when issued to corrective or preventative maintenance work orders.

## **8. Preventive Maintenance Procedures**

Preventive Maintenance Procedures are the PM tasks that your equipment need. PM procedures can be assigned to any number of equipment items (in the full ToolTime system) and store the general information about a PM task.

## **9. Equipment Information**

Equipment information includes location, inventory assignments, and nameplate data, which can be tailored to your individual equipment needs. Also equipment items track their current mileage, time in use, etc. for use in PM maintenance.

## **Numbering Systems**

Another important step in preparing ToolTime for use is the development of a numbering system. To be able to use ToolTime's features, you must come up with a numbering system for your equipment, equipment locations, preventive maintenance procedures, and parts inventory. Because ToolTime is a computer-based maintenance management system, it requires a tracking index method. Unique equipment numbers provide a means by which ToolTime can accurately relate and track all information regarding an equipment item. Therefore, the equipment ID number is the key alphanumeric number that ToolTime uses to track all work order information.

While numbering systems can be somewhat arbitrary, they should be logical, expandable, and provide the user with a quick visual reference as to the identity of the equipment item. For example, using a leading character "P" for pumps, or "M" for motors provides an instant clue to the system user as to the type of equipment. Following are some tips in developing your numbering systems:

- Try to use all of the character spaces available *in* each number. For example, if the system allows 10 characters for an equipment ID number, use all 10 characters. Use leading zeros or other characters if necessary. This will provide for uniform number lengths and easier view of reports and other printed maintenance information.

- Avoid using unnecessary characters such as dashes, spaces and asterisks. They limit your usable field character length and provide little or no usefulness from a numbering perspective.
- Avoid embedding a location code *in* an equipment ID number. ToolTime allows the creation and assignment of separate location ID numbers. ToolTime uses the equipment ID number to track information for an equipment item. If you embed a location code and later relocate the equipment, a new equipment ID number must be assigned, thereby disassociating the work history for that equipment item.
- Embedding equipment type categories within numbers can be helpful. It will aid users in quickly identifying the equipment. For example, you could lead all centrifugal pumps with "P100." The "P" designates "pump," while "100" designates a "centrifugal pump."

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## Using Patterns and Wildcards in ToolTime

ToolTime frequently allows you to search for specific information based on criteria that you set. These places include all report selection screens, PM, CM and purchase order searches. Many of these screens will include a pattern box, or another area where wildcards may be used.

Patterns can be the exact text of a desired ID or a mixture of text and wildcard characters. Wildcards consist of the question mark (?) and the asterisk (\*). A question mark can stand in the place of any single character in the ID. Thus, if you wanted to search for all IDs with the first three characters matching "123" and the final one being anything, you would type the pattern:

Pattern: 123?

IDs such as 1234, 1230 and 123A will be found by the above pattern.

The asterisk finds any characters and any number of characters. Thus, if you wanted all IDs which begin with 1, you would enter:

Pattern: 1\*

In the given case, IDs such as 15, 1AD and 1234 would all be shown. Any combination of wildcards and allowed characters may be used.

# Technical Specifications

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## System Requirements

- Windows 3.1 or higher, Windows 9x or Windows NT
- 386 or higher (486 recommended)
- 8MB RAM (12MB recommended)
- 15MB hard disk space

Networks: ToolTime has been thoroughly tested using Novell v3.12, but should also work with the following network operating systems:

- Windows for Workgroups 3.11
- Windows 9X or NT network
- Novell v3.x, v4.x
- LANtastic peer-to-peer network

Regular backups of your critical data is essential. Although ToolTime does not provide a backup function, we ***strongly*** recommend you purchase a suitable backup device such as a tape backup unit, or one of the many popular high-capacity removable disks.



# Contacting Support

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## How To Get In Touch With Us

Dixon Creek Software's regular office hours are Monday through Friday 8:30am to 5:00pm Pacific Time. We can be reached in the following manners:

<b>Toll-free:</b>	(888) 349-6627
<b>Oregon:</b>	(541) 752-3051
<b>Fax:</b>	(541) 752-6804
<b>E-mail:</b>	<a href="mailto:fms@dixoncreek.com">fms@dixoncreek.com</a>
<b>Mailing Address:</b>	PMB 200 2397 NW Kings Blvd. Corvallis, OR 97330

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## ToolTime Support Program

From time to time problems come up that require assistance from our technical staff. We at Dixon creek Software strive to provide the highest quality user support available. We are always more than happy to supply you with helpful, friendly and courteous answers to all your computer questions.

The purchase of your ToolTime product entitles you to one full year of free technical support as well as all maintenance updates during that period of time. You will also receive special notification of new ToolTime products and upgrades as they become available. Additional annual support agreements may be purchased from Dixon Creek Software and will provide the same technical support, maintenance updates and services received during the first year.



# How to Use Help

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## Online Help

The Demonstration Version of ToolTime also provides the full manual text as an online help facility. You can access that information from the Help menu on the Main Screen or by pressing F1 at any time.

To view the information on how to use the help file, run ToolTime and from the Help menu on the Main Screen choose Contents. After the help file loads, click the Help menu there and from the list choose How to Use Help. Information can also be obtained from your Windows documentation.

This manual was produced using *Doc-To-Help*<sup>®</sup>, by WexTech Systems, Inc.

