MaintSmart 3.4 Enterprise -- Release Notes (7/15/2007)
This upgrade was in development for approximately one year. Initially our development staff intended to provide a reasonable purchasing upgrade. As this upgrade evolved we found it necessary add many more features in order to provide a complete and robust purchasing system. This included the addition of approximately 130 new user permissions and a completely rebuilt user setting architecture. Multilingual version coming within the next few months.

MaintSmart 3.4 contains the following enhancements:
- **General Enhancements**
  - Translator: translate most literal text into any single-byte supported language. Includes most western European, Latin American, African and Scandinavian languages. Windows Vista supports Arabic, Chinese, etc.
  - Printing
    - Convert, save and print any data grid as an Excel spreadsheet (.xls file). MaintSmart 3.3 exports data grids to .csv (an Excel-friendly format) but this did not retain the grid formats and did not display the column headers. MaintSmart 3.4 converts directly to a .xls file and does retain column headers and formats.
    - Print the scheduler as an Excel file.
    - Print the hot sheet's graphical tree view.
  - Extensive user permission upgrades
    - Quick add task.
    - Quick add failure cause.
    - Quick add parts.
    - Better security on Program Administration screen.
  - Settings an defaults
    - Four levels of setting now in use. Your user settings are available regardless of the workstation you happen to be working at.
      - Global setting (database wide)
      - Plant settings (plant or top-level)
      - User specific settings
      - Computer workstation settings.
      - Permissions to restrict any of these settings being changed by specific users.
  - Other
    - Type search most text fields (drop-down boxes and some data grids.
    - Opening and closing various screens greatly speeded up. Other speed and optimization enhancements.
    - Required fields are colored yellow.
    - Added fields to Plants table.
    - Separated Plant City from Plant Unique identifier.
    - Auto-naming of second and third equipment hierarchy levels. Useful for naming Building-Room # format.
    - Inter-plant inventory transfer request and transfers.
    - Extensive logged in user data fields available. Sixteen fields added to user login (Passwords table).
    - Default link users, equipment, work orders to account and/or cost center.
    - Spell-checker where appropriate.
    - Deactivate equipment, personnel, requestors and vendors.
    - Cascading delete of certain data items has been restricted.
    - Five more fields added to equipment details.
    - Defaults added to equipment details screen to speed data entry.
    - Store grid column sort order by user setting.
    - Sequence equipment order.
    - Equipment Group Filters only display groups appropriate to active location as opposed to all groups.
- **Changes to MaintSmart**
  - Parts usage system separated from PO screen and available from Gray Bolt button bar (previously gray bolt was parts stock configuration).
  - Parts stock configuration (inventory set-up) is now available from the Yellow Bolt.
  - Settings are stored in database now instead of registry (where applicable).
- **Purchasing System**
  - General Information
    - Approximately 100 new user permissions added. Most give great flexibility in permitting users to access certain parts of purchasing system but not other parts. For example: create requisition but need another permission level to approve items and yet another level to release a P.O. number for these approved items.
    - Parts usage screen separated from P.O screen.
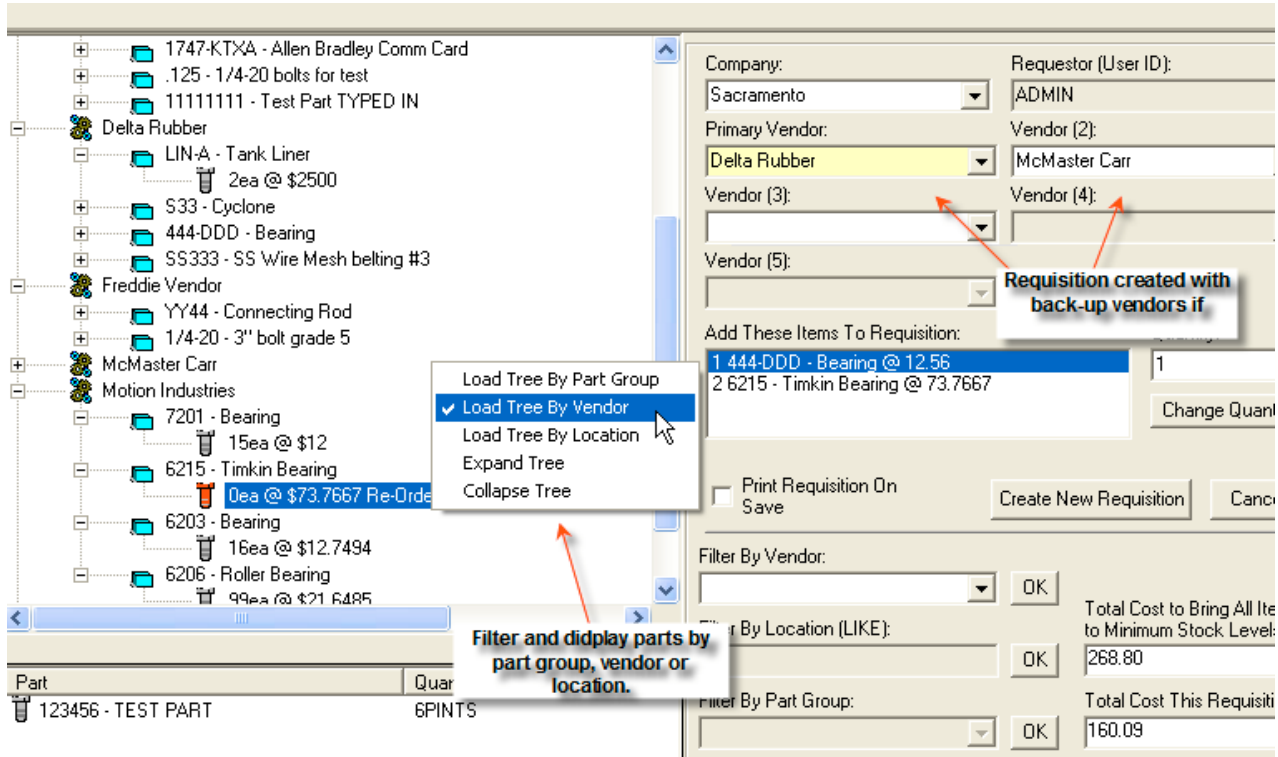   - Create quote request (optional), convert to requisition, approve requisition items, release P.O. number.

- Old system still available that allows direct P.O. creation w/o using a requisition. (With proper permissions).
- Account parents added.
- Cost center parents added.
- Additional fields added to cost center and account.
- Alphanumeric Cost Center, Account and Vendor numbers in addition to description field.
- Vendors may be set to global. This makes it possible to shared vendors between plants.
  - Quotes Requests
    - Create quote requests then email to vendor as Excel or HTML from program
    - Convert quote request to a requisition with one button-click
    - Create new parts on the fly with almost no effort.
    - Enter pricing received from vendors into quote request system.
  - Requisitions
    - Enhanced requisition screen. Create requisition then add items to requisition.
    - RFQ up to five vendors from requisition screen by email, print or Fax.
    - Enhanced requisition tree provides vendor, part group or location graphical tree view of all parts and highlights below minimum stock items. Linked to vendor for easy conversion to P.O.
    - Six user defined approval levels based upon approval amount and signature count.
    - Regional currency symbol displayed.
  - P.O.
    - Link different line items to different accounts/cost centers.
    - Match vendor invoices to P.O. line items.
    - Blanket P.O. release number field added.
    - Job reference field added.
    - Contact and shipping information easily populated from multiple sources or may be typed in by user.
    - Three (3) P.O. formats available.
    - Link items on P.O. to different cost centers and or accounts as needed.
    - Many new fields added to P.O. screen including contact and shipping fields, Job Reference, Contract Number, Transaction Date, etc.
    - Duplication of P.O. is especially useful for blanket Pos
    - Purchasing contractor work has been simplified.
  - Invoice Matching
    - Match received parts to internal invoice numbers.
    - Open fields (one numeric, one alphanumeric) available for linking MaintSmart to company accounting program with custom stored procedures (user).

- **Inventory**
  - Filter parts list by Vendor or Part Group.
  - Menus organized.
  - Inventory system offers better security.
  - Quick Add Part feature enhanced.
  - Vendors may be global.
  - NOTE: MaintSmart 3.5 will focus on many enhancements to the inventory screen.

- **Work Orders**
  - Date and time now used instead of just date
  - Work order status logger tracks work order status changes through work order life.
  - Link work orders to cost center and/or account. Cost center and/or account may be locked to user also.
  - Save details as MS Word or Rich Text formats. Open MS Word or Rich Text files directly into any details screen (PMs, work orders, etc.)
  - Save details as MS Word or Rich Text formats. Open MS Word or Rich Text files directly into any details screen (PMs, work orders, etc.)
  - Spell checker available for task descriptions and detailed instructions.
  - Added Technician (Engineer) to Work Order Templates screen so user may edit technician easily.

- **PMs**
  - Update a block of PMs and divide the completion time between them or apply the same completion time to all selected PMs.
  - Ability to change PM interval on an existing PM record.
  - Copy task, task package or job list template to groups of equipment (batch update). Copy tasks to all equipment in Work Area, Line or entire Plant with one button click.
  - Convert tasks to proper case on save.
  - Save details as MS Word or Rich Text formats. Open MS Word or Rich Text files directly into any details screen (PMs, work orders, etc.)
  - Sequence PM task lists
  - New PM task list formats list equipment at page header and reset page numbering on change of equipment name.

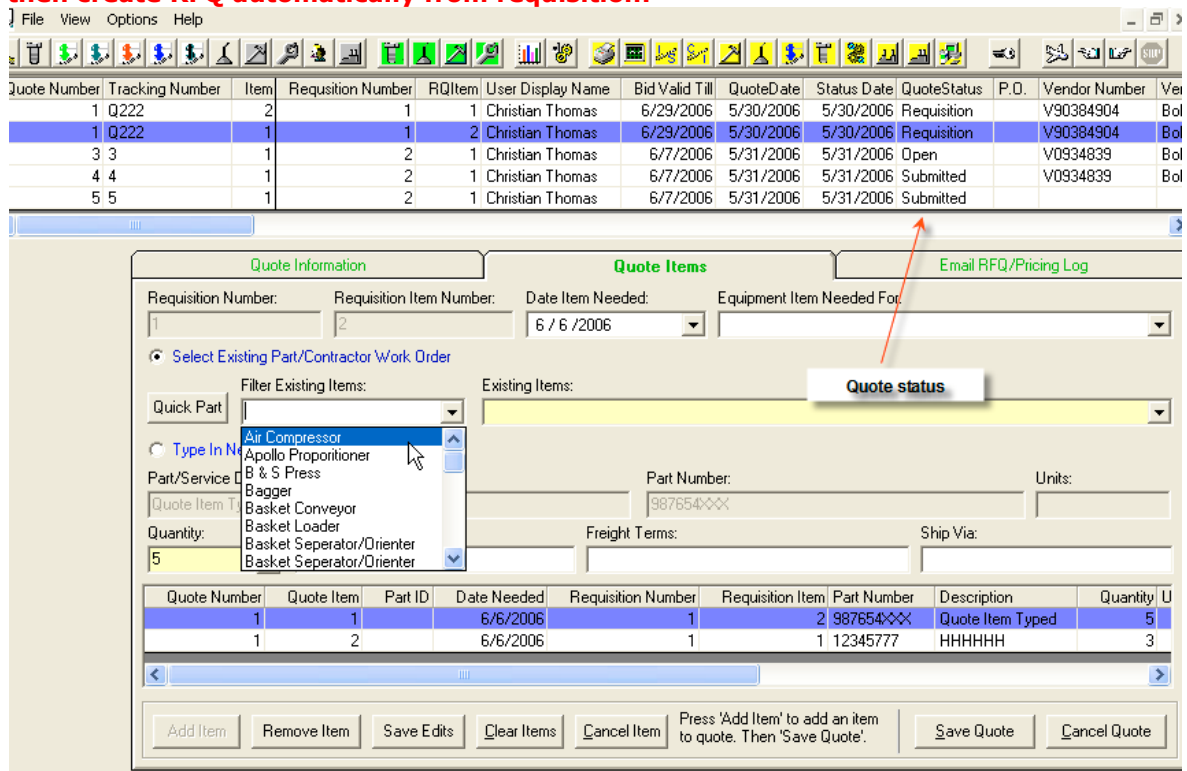- **Down Time (Equipment Failures)**
  - Quick Add failure cause permission allows basic user to add a failure cause on the fly.
  - Convert cause descriptions to proper case on save.
  - Spell checker available for failure causes.
  - Time field added to down time records (in addition to existing date field).

Many more useful features and fixes too…

Inventory requisition tree has been upgraded.

Quote request screen. Create quote requests then convert them to a requisition if needed OR create requisition then create RFQ automatically from requisition:

Requisition approval and P.O. number release requires adequate user permissions.

n Number	Item Approved	User Display Name	Requisition Date	Date Wanted	Requisition Status	P.O.	Blanket PO	Vendor 1	Cont
1	☑	Christian Thomas	5/30/2006	6/6/2006	Approval In Progress			Bolts Unlimited, Ltd.	
2	☐	Christian Thomas	5/30/2006	6/6/2006	Approval In Progress			Bolts Unlimited, Ltd.	
1	☐	Christian Thomas	5/31/2006	5/31/2006	Approval In Progress			Bob the Builder	
1	☐	Christian Thomas	5/31/2006	5/31/2006	Approval In Progress			Bob the Builder	

Requestor Information | Vendors/RFQ | **Requisiton Approval** | Approved Requisitions/It

Part ID: 9400019
Part/Service Description: Big Money Item
Part Number: 55555
Units: EA

Quick Part | New Part | Work Order
Quantity: 2
Item Cost (select/type): 100000
Tax: 0
Freight: 0
Total Item Cost:

Cost Center: CC-123-456 - AnyTown Plant
Account: MR-5552-0098778 - Engineering Sundries
☐ Sole Source For This

Notes:
Total/Requisition: $200,000.00
Total Cost/Item: $200,000.00

Big ticket items may required more than on electronic signature. MaintSmart even tracks signatures when one or more is withdrawn prior to P.O release

Requisition Item List

Item Number	Sole Source	Item ID	P		ity	Unit Cost	Total Item Cost	No
1	☑	9400019			2	$100,000.00	$200,000.00	

Maximum Approval Level/Requisition: $10,000,000.00

Required Approval Level: Level: 4
Signatures Required: 3
Signatures Obtained: 1
Requisition Status: Signature(s) Needed

Approved | Not Approved | Release RQ | Ca

Work order screen enhancements.

Work Order #124	Work Order Labor Hours (optional)	Work Order History

Work Order #	Date Assigned	Date Completed	Technician	Work Area Desc.	Equipment
116	05/15/2006 12:31:00 PM		No Assignment - 327	Outside	Transfer Conveyor #1
117	05/15/2006 12:32:00 PM	05/15/2006 12:45:00 PM	No Assignment - 327	Outside	Transfer Conveyor #1
118	05/15/2006 12:44:18 PM		Nick Dixon	Bread Baggers/Wrappers	90 Degree Roller Bed
119	05/15/2006 12:49:00 PM		No Assignment - 327	Utilities	Condensor #1
120	05/15/2006 12:53:30 PM		Nick Dixon	Bread Baggers/Wrappers	90 Degree Roller Bed
121	05/15/2006 12:54:51 PM		Nick Dixon	Bread Baggers/Wrappers	90 Degree Roller Bed
122	05/15/2006 12:55:36 PM		Nick Dixon	Bread Baggers/Wrappers	90 Degree Roller Bed
123	05/22/2006 10:40:00 AM	05/22/2006 10:44:00 AM	Bob Ha		Steam Cooker/Cooler #2
124	05/24/2006 11:26:00 AM		No Ass	Wrappers	90 Degree Roller Bed

Date and Time

Location: * Building: * Room: * Asset: * Serial Number: * Note:
Company: Sacramento
Work Order Number: 124
Date/Time Assigned or Status Changed: 5 /24/2006 11:26:00 AM
Date/Time Completed: 6 / 1 /2006 12:00:00 AM
Labor Hours: 0

Equipment: 90 Degree Roller Bed | Filter
Type: Project
Priority: Routine
Status: Active

Optionally link work order to account and/or cost center. Lock to user name these to equipment or user if needed.

Task: Adjust chain tension. | Filter | New
Work Area: Bread Baggers/Wrappers
Room: Bread Packaging

Technician(optional): No Assignment - 327 | +
Requestor: No Requestor - 327
Comments or Short Instructions (optional 255 chars.): Change light bulb.

Cost Center: CC-123-456 - AnyTown Plant
Account: MR-5552-009899 - Machine Repai

Details | Use Parts

File Attachments: pictures, documents, etc. (optional)
Add | Remove | Print | View

Work Order/Work Request #124
New | Delete | Save | Cancel

Over 130 new user permissions added.

We listened to our users' requests and responded with the largest upgrade in MaintSmart history. Hope you like it!

MaintSmart Support Group
MaintSmart Software, Inc. – MaintSmart