

eam2go™ Free Edition

(Version 1.0.11 20051024)

Getting Started Guide

Revision 3.0

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Objective

This Getting Started Guide is designed to get you started using **eam2go's Free Edition** as quickly as possible. This guide is divided into several smaller sections:

1. **Introduction:** Brief Introduction to all modules in eam2go Free Edition.
2. **Integration:** Understand the integration between main modules.
3. **Navigation:** How to navigate as well as look and feel.
4. **Setting Up:** Setting up your system.
5. **Transacting:** Quick tutorial on how to transact using eam2go.
6. **Support and feedback.**

Introduction

eam2go Free Edition consists of seven (7) main modules.

1. Home – It is used to provide a summary display of exceptions and other important statistics. Users can drill down to details from each summary item.
2. Scheduling – It is used to create templates which can be reused to generate preventive maintenance work orders on a predetermined schedule.
3. Work Order – It is used to create new manual work orders which will then be used to track service or repair details and finally generate reports for analysis.
4. Inventory – It is used to manage spare parts inventory within stock rooms and bins. You can use it to issue, receive or transfer inventory between stock rooms and bins.
5. Tools – It is used to manage tools that are used for maintenance. With this module, users are able to track each tool's availability and movement history.
6. Assets – It is used to record asset information and specifications. Assets could be machines, equipments, motor vehicles, computers or buildings.
7. Admin – It is used to manage system wide parameters, security and master file information.

Integration

eam2go Free Edition is a highly integrated system. This reduces the need for duplicate data entry and improves data accuracy and timeliness.

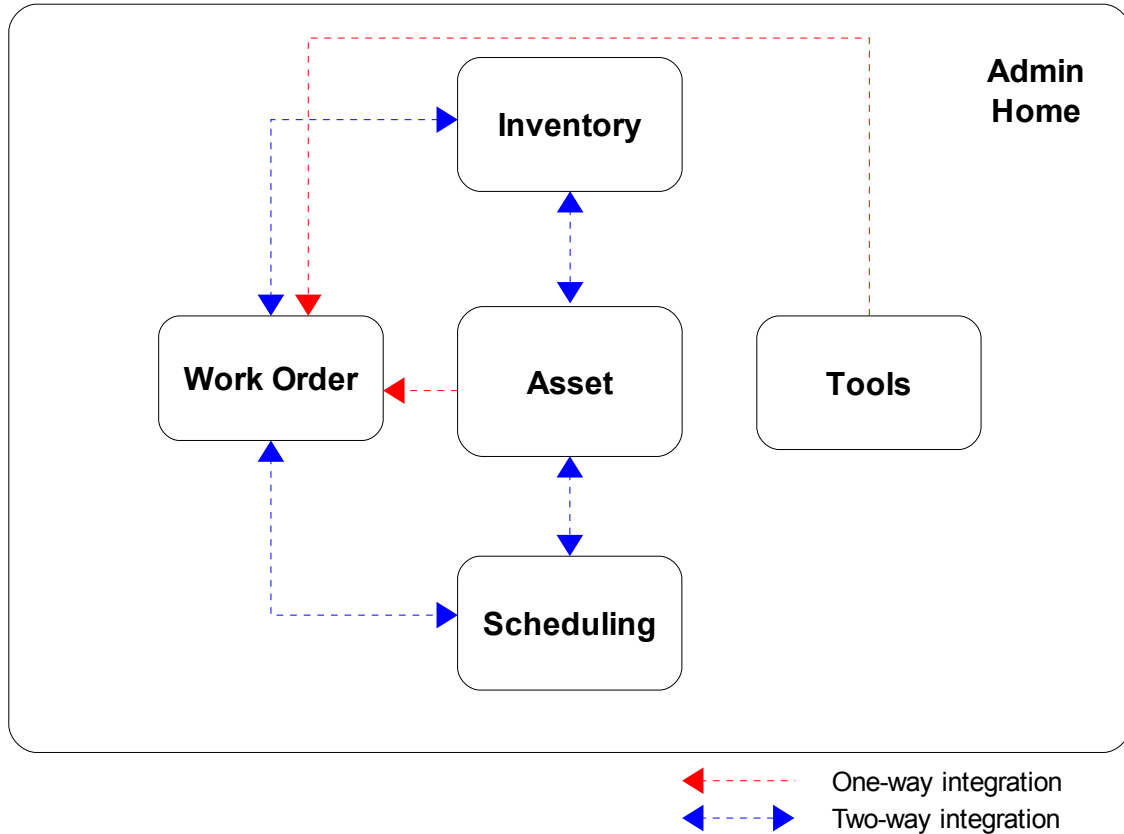


Illustration 1: eam2go Free Edition Main Module Integration

Illustration 1 above shows how each of the eam2go Free Edition modules are linked together. The blue arrow represents two-way integration where there is data being read and written between both modules. The red arrow shows a one-way integration where one module reads / write from / to another module.

Navigation

Modules

The screenshot displays the eam2go web application interface. At the top, there is a navigation bar with the following main modules: HOME, SCHEDULING, WORK ORDER, **INVENTORY** (highlighted), TOOL, ASSET, PURCHASING, ANALYSIS, and ADMIN. Below this, there is a sub-navigation bar for the Inventory module with options: New Part, **List** (highlighted), Issue to WO, Receive from WO, and Reports. A red box highlights the main navigation bar, and a red arrow points to the sub-navigation bar. The main content area shows a table of parts with columns: Part ID, Part Description, Part Type, Model, Total Quantity, UOM, and Inquiry. The table contains 15 rows of data. Below the table, there are buttons for Open, Inactivate, Activate, Delete, Misc Receipt, Misc Issue, and Misc Transfer. The page number is 1 of 6, and there are navigation links [1] [2] [3] [4] [5] [6] [>>].

Part ID	Part Description	Part Type	Model	Total Quantity	UOM	Inquiry
1111111111	111	BEATERS	11	0	BOX	[H]
123	xyz	CORD		1	EACH	[H]
123456789	HEATER BAND	MISCELLENEUS PARTS		5000	EACH	[H]
2643	Roller	Wearing parts		0	BOX	[H]
401BWK160KCSZ	BALL VALVE VBA3030 10"	VALVES		1	UNIT	[H]
4321	New Part for Test	MISCELLENEUS PARTS		0	BOX	[H]
a	MM4001 BEATER	BEATERS	234-6576	19	UNIT	[H]
aaa	aaa	1	222	0	AMPS	[H]
ALBELSTUFFER01	ALUMINIUM BELL STUFFER 0234	STUFFER		11	UNIT	[H]
ALBELSTUFFER02	ALUMINIUM BELL STUFFER 0909	STUFFER		18	UNIT	[H]
ALLARDSTUFFER01	ALUMINIUM LARD STUFFER	STUFFER		7	UNIT	[H]
b1	MM4002 BEATER	CORD	345 grge gre	2	AMPS	[H]
b2	MM4003 BEATER	CORD		5	UNIT	[H]
be	parker pen	BOWLS	parker 9 series	0	EACH	[H]
BEATER02	MM1000 SUNBEAM BEATER	BEATERS	UI-239-IO-234	8	PAIR	[H]

The Main Modules consists of Home, Scheduling, Work Order, Inventory, Tool, Asset and Admin. For each Main Module, lies Sub Modules. For example, in the illustration above, the sub modules for Inventory main module are New Part, List, Issue to WO, Receive from WO and Reports.

The current active modules (Main or Sub) will be highlighted when chosen.

Views

eam2go is designed in such a way that allow users to navigate information easily and quickly. Essentially, eam2go is made up of the following basic screen types:

1. List View
2. Hybrid View
3. Pop-Up Window

List View

The screenshot displays the eam2go web application interface. At the top, there is a navigation menu with options: HOME, SCHEDULING, WORK ORDER, INVENTORY (highlighted), TOOL, ASSET, PURCHASING, ANALYSIS, and ADMIN. Below the menu, there are buttons for 'New Part', 'List', 'Issue to WO', 'Receive from WO', and 'Reports'. The main content area features a table with columns: Part ID, Part Description, Part Type, Model, Total Quantity, UOM, and Inquiry. The table contains 18 rows of data, including items like '111111111', '123', '123456789', '2643', '401BWK160KCSZ', '4321', 'a', 'aaa', 'ALBELSTUFFER01', 'ALBELSTUFFER02', 'ALLARDSTUFFER01', 'b1', 'b2', 'be', and 'BEATER02'. Annotations in red text point to various elements: 'Filter' points to the 'Active Parts' dropdown; 'Search' points to the 'Part ID' dropdown; 'List View' points to the table; 'Open Button' points to the 'Open' button; 'Batch Transaction Buttons' points to the 'Inactivate', 'Activate', 'Delete', 'Misc Receipt', 'Misc Issue', and 'Misc Transfer' buttons; and 'Page Navigation' points to the page number 'Page: 1 of 6' and the navigation links '[1] [2] [3] [4] [5] [6] [>>]'.

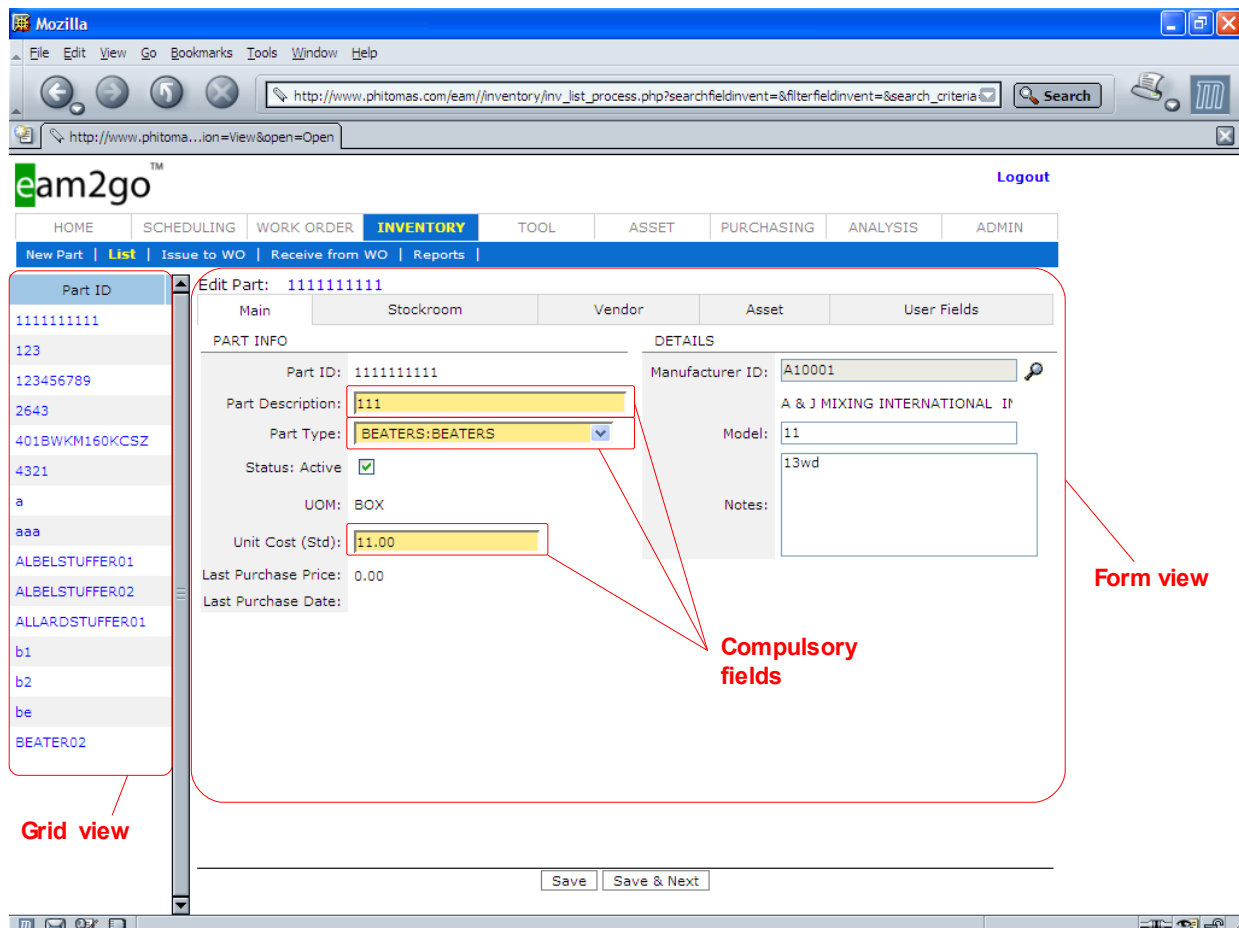
Part ID	Part Description	Part Type	Model	Total Quantity	UOM	Inquiry
111111111	111	BEATERS	11	0	BOX	[H]
123	xyz	CORD		1	EACH	[H]
123456789	HEATER BAND	MISCELLENEUS PARTS		5000	EACH	[H]
2643	Roller	Wearing parts		0	BOX	[H]
401BWK160KCSZ	BALL VALVE VBA3030 10\	VALVES		1	UNIT	[H]
4321	New Part for Test	MISCELLENEUS PARTS		0	BOX	[H]
a	MM4001 BEATER	BEATERS	234-6576	19	UNIT	[H]
aaa	aaa	1	222	0	AMPS	[H]
ALBELSTUFFER01	ALUMINIUM BELL STUFFER 0234	STUFFER		11	UNIT	[H]
ALBELSTUFFER02	ALUMINIUM BELL STUFFER 0909	STUFFER		18	UNIT	[H]
ALLARDSTUFFER01	ALUMINIUM LARD STUFFER	STUFFER		7	UNIT	[H]
b1	MM4002 BEATER	CORD	345 grge gre	2	AMPS	[H]
b2	MM4003 BEATER	CORD		5	UNIT	[H]
be	parker pen	BOWLS	parker 9 series	0	EACH	[H]
BEATER02	MM1000 SUNBEAM BEATER	BEATERS	UI-239-IO-234	8	PAIR	[H]

1. **List View** – A List View is made up of a summary listing of main information of each main module.
2. **Filter** – The Filter list-box consists of predefined filters in which you can filter the list view data. Just select on the required filter and click the Go button.
3. **Search** – The Search function consists of a list-box and a text-box. The list-box contains predefined fields in which you can search data based on the values you enter the text-box. You can enter wild card character “%” in the text-box to search partial strings. For example, if you wish to search for any Part ID which contains the alphabets “BEL”, then select the Part ID value from the search list-box. Then enter the following

information in the text-box; %BEL%. Click the Go button and you will have your list view filtered based on your search criteria. You can use both Search function in conjunction with the predefined Filter list-box for more detail search.

4. **Page Navigation** – Should the filtered data exceed what the page can hold (typically 15 records), then the balance of the records will be stored in other pages. To navigate to the other pages, just click on the page numbers or click on the [>>] hyperlink to go to the last page.
5. **Open Button** – The Open Button is used to open up another screen called the Hybrid View. By checking on the records in the List View, you can choose which records you wish to view in detail. Once checked, click on the Open Button. This will take you the the Hybrid View.
6. **Batch Transaction Buttons** – Each of these buttons can be used to perform batch transactions against the records checked (selected) in the List View.

Hybrid View



1. **Hybrid View** – The Hybrid View is made up of a **Grid view** on the left and a **Form view** on the right. The Grid view provides a 'birds-eye' view of all the selected records and the form view provides the details. As you click on the records in the Grid view, the information on the Form view will change accordingly.

2. **Compulsory Fields** – Compulsory fields are fields marked in yellow. You can only save a record if only all compulsory fields are populated.
3. **Optional Fields** – Optional fields are in white color text-boxes.
4. **Display Only Fields** – Display only fields do not have text-boxes and cannot be edited.
5. **Search Fields** – Search fields can only be changed / populated by selecting one of the records from the Pop-Up Window.

The screenshot shows the eam2go web application interface. At the top, there is a navigation menu with options: HOME, SCHEDULING, WORK ORDER, **INVENTORY**, TOOL, ASSET, PURCHASING, ANALYSIS, and ADMIN. Below the menu is a table of parts. The table has columns: Part ID, Part Desc., Part Type, and Manufacturer. The first row is highlighted, showing Part ID 1111111111, Part Desc. 111, Part Type BEATERS, and Manufacturer 11. To the right of the table is a form view for the selected part, titled 'Edit Part: 1111111111'. The form contains fields for Part ID, Part Description, Part Type, Status, UOM, Unit Cost, Last Purchase Price, and Last Purchase Date. A red arrow points to a vertical pane between the table and the form, which is labeled 'Pane' in red text.

Part ID	Part Desc.	Part Type	Manufacturer
1111111111	111	BEATERS	11
123	xyz	CORD	
123456789	HEATER BAND	MISCELLENEUS PARTS	
2643	Roller	Wearing parts	
401BWKM160KCSZ	BALL VALVE VBA3030 10"	VALVES	
4321	New Part for Test	MISCELLENEUS PARTS	
a	MM4001 BEATER	BEATERS	234-6576
aaa	aaa	1	222
ALBELSTUFFER01	ALUMINIUM BELL STUFFER 0234	STUFFER	
ALBELSTUFFER02	ALUMINIUM BELL STUFFER 0909	STUFFER	
ALLARDSTUFFER01	ALUMINIUM LARD STUFFER	STUFFER	
b1	MM4002 BEATER	CORD	345 grge
b2	MM4003 BEATER	CORD	
be	parker pen	BOWLS	parker 9 s
BEATER02	MM1000 SUNBEAM BEATER	BEATERS	UI-239-ID

6. **Pane** – Between the Grid view and the Form view, lies a movable pane. Move your mouse cursor to the edge of the pane until the pointer changes shape to a horizontal double-edge arrow cursor. Click and drag the pane to the right. The grid is essentially made up of the same fields as the List View.

Pop-Up Window

The screenshot shows the eam2go web application interface. The main window displays the 'Edit Part' screen for Part ID 111111111. A red circle highlights the magnifying glass icon in the 'Manufacturer ID' field. A red arrow points from this icon to a pop-up window titled 'eam2go - Manufacturer List - Mozilla'. The pop-up window contains a search form with 'Search By' set to 'Manufacturer ID' and 'Number of Records' set to 50. Below the search form is a table of manufacturer records.

Manufacturer ID	Manufacturer Name
--None--	--None--
W10001	WORLDWIDE REFRIDGERATION INDUSTRIES , INC
W10002	WEILER MACHINE TOOLS
WEINIG	Michael Weinig USA
X10001	XIN TIAN GROUP CO., LTD.
xm002	xiamen sanan electronics Co.,Ltd.

1. **Pop-Up Window** – Clicking on the Magnifying Glass icon above will display a Pop-Up Window. A Pop-Up Window generally display a list of records in which you can select from. Each Pop-Up Window allows you to search using certain predefined fields and wild card characters. You can also specify the maximum number of records to display. By default, 50 records are displayed.

Setting Up

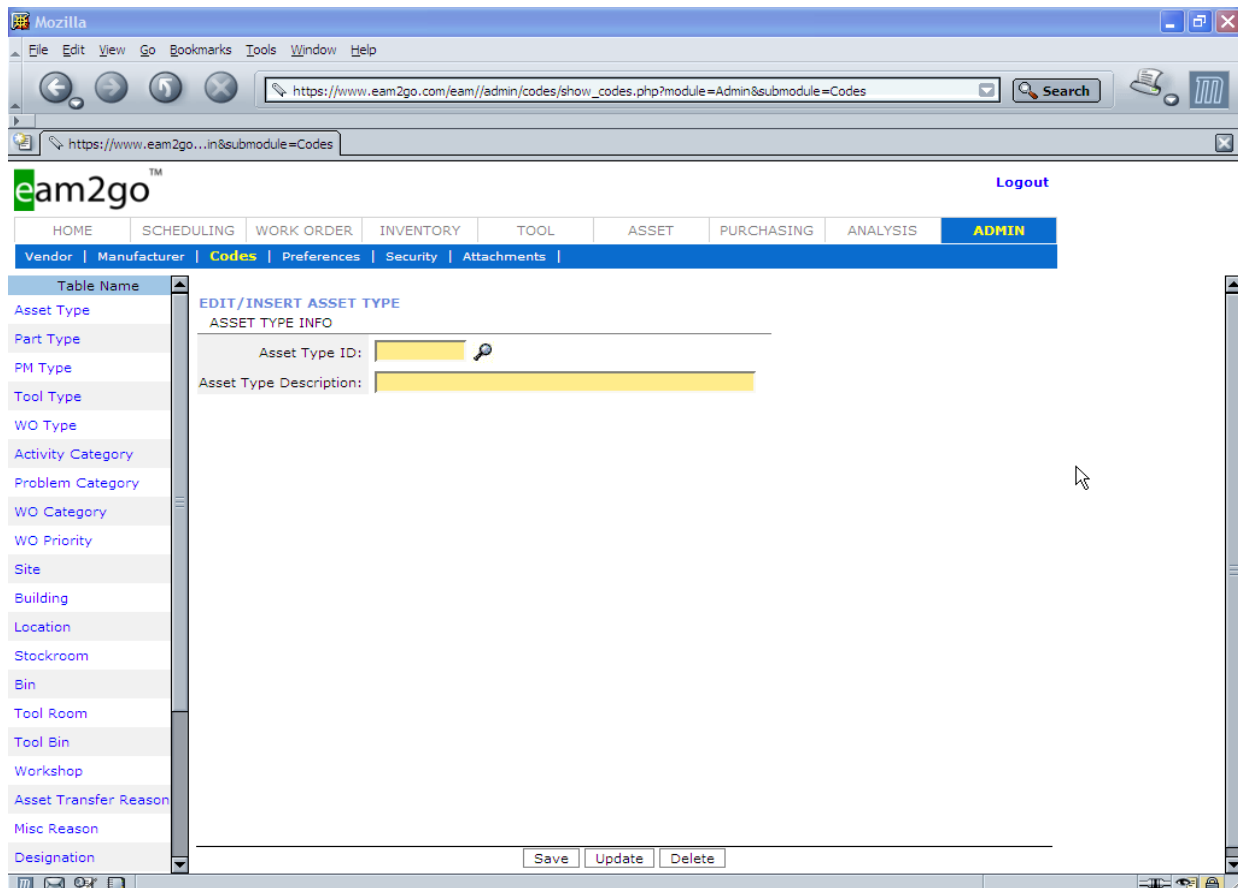
Overview

Before you can begin using eam2go Free Edition, you will need to do the following minimal setup:

1. Master data entry.

Master Data

Before you can begin using eam2go Free Edition, you will need to populate certain master data relevant to your company's maintenance operations. To successfully set up your system, enter the compulsory master data in the following order.



Go to Admin -> Codes

Seq No	Master Data Description	Module	Required in	Optional / Compulsory
1	Asset Type	Admin - Codes	Assets	Compulsory
2	Part Type	Admin - Codes	Inventory	Compulsory

Seq No	Master Data Description	Module	Required in	Optional / Compulsory
3	PM Type	Admin - Codes	Scheduling	Compulsory
4	Tool Type	Admin - Codes	Tools	Compulsory
5	WO Type	Admin - Codes	Work Order	Compulsory
6	Activity Category	Admin - Codes	Global	Compulsory
7	Problem Category	Admin - Codes	Work Order	Compulsory
9	WO Priority	Admin - Codes	Work Order	Compulsory
10	Site	Admin - Codes	Global	Compulsory
11	Building	Admin - Codes	Global	Compulsory
12	Location	Admin - Codes	Global	Compulsory
13	Stockroom	Admin - Codes	Inventory	Compulsory
14	Bin	Admin - Codes	Inventory	Compulsory
15	Tool Room	Admin - Codes	Tools	Compulsory
16	Tool Bin	Admin - Codes	Tools	Compulsory
17	Workshop	Admin - Codes	Work Order, Assets	Compulsory
18	Asset Transfer Reason	Admin - Codes	Assets	Compulsory
19	Misc Reason	Admin - Codes	Inventory	Compulsory
20	Designation	Admin - Codes	Global	Compulsory
21	Department	Admin - Codes	Assets	Optional
22	Employee	Admin - Codes	Global	Compulsory
23	Problem	Admin - Codes	Work Order	Optional
24	UOM	Admin - Codes	Global	Compulsory
25	UOM Conversion	Admin - Codes	Global	Optional
26	Currency	Admin - Codes	Global	Compulsory
27	Terms	Admin - Codes	Global	Compulsory
28	Vendor	Admin - Vendor	Global	Optional
29	Manufacturer	Admin – Manufacturer	Global	Optional
30	User Defined Fields	Admin - Preferences	Global	Optional

Start Using eam2go!

Creating Master Records

After creating the necessary Codes above, you will can now start entering your maintenance master records such as your Assets, Inventory, Tools or PM Templates.

The sequence to create these records are listed below:

Seq No	Master Records	Module	Remarks
1	Asset	Assets - New	Enter your equipments or other assets.
2	Parts	Inventory – New Inventory	Enter your spare part records.
3	Tools	Tools – New Tools	Enter your tool records.
4	WO Task ID	Work Order – WO Task	If you wish to have standard work order tasks, create WO Task ID to simplify task selection in future.
5	PM Templates	Scheduling – Add PM Template	Use PM Templates to create predefined work order details. Once created, you can use the schedule to generate work orders based on the templates you created.

Start Transacting

After populating the above master data (codes) and master records into the system, you can now start transacting. Most activities can be accomplished in the List View of the each main module. Among the transactions in which you can create with each module are:

Asset

Transaction	How To?
Transfer Asset between Parents	Click on the [C] hyperlink under the Action column in the List View. Transfer Asset Between Parents
Transfer Asset between Locations	Click on the [L] hyperlink under the Action column in the List View. Transfer Asset Between Locations
Inactivate / Activate an Asset	Select your desired asset or list of assets from the List View. Click on the Inactivate button to inactivate asset or click Activate to activate.
Delete an Asset	Click on the Delete button in the List View. Assets with transaction history cannot be deleted.
View Transaction History	Click on the [H] hyperlink under the Inquiry column in the List View.

Inventory

Transaction	How To?
Inactivate / Activate a Part	Select your desired Part ID or list of Part IDs from the List View. Click on the Inactivate button to inactivate or click Activate to activate.
Delete a Part	Click on the Delete button in the List View. Parts with transaction history cannot be deleted.
View Transaction History	Click on the [H] hyperlink under the Inquiry column in the List View.
Miscellaneous Receipt	Click on the Misc Receipt button in the List View. This is to conduct miscellaneous receipt of parts which are not purchase order receipts. Purchase order receipts are done in the Purchasing module.
Miscellaneous Issue	Click on the Misc Issue button in the List View. This is to conduct miscellaneous issue of parts. If you wish to issue parts to work order, use the Issue to WO sub-module.
Miscellaneous Transfer	Click on the Misc Transfer button in the List View. This is to transfer parts from one stockroom location to another.
Issue Parts to Work Order	Use the Issue to WO sub-module.
Return Parts from Work Order	Use the Receive from WO sub-module to return excess parts which were issued to a particular work order.

Work Order

Transaction	How To?
Create a new Work Order	Click on the New Work Order sub-module.
Record Activities Completed on a Work Order.	Use the WO Feedback sub-module.
Close a Work Order	Click on the Close button in the List View.
Cancel a Work Order	Click on the Cancel button in the List View. Only Open work orders can be cancelled.
Hold a Work Order	Click on the Hold button in the List View. Work orders on hold cannot be transacted.
Reopen a Closed or Hold Work Order	Click on the Reopen button in the List View. Only Closed and Hold work orders can be reopened.
Print a Work Order	Click on the Print button in the List View.

Tools

Transaction	How To?
Inactivate / Activate a Tool	Select your desired Tool ID or list of Tool IDs from the List View. Click on the Inactivate button to inactivate or click Activate to activate.
Delete a Tool	Click on the Delete button in the List View. Tools with transaction history cannot be

<i>Transaction</i>	<i>How To?</i>
	deleted.
Transfer a Tool	Click on the [T] hyperlink under the Action column in the List View, to transfer a tool from one location to another.
Issue a Tool	Click on the [I] hyperlink under the Action column in the List View, to issue a tool to an employee. You can also do miscellaneous issues here.
Receive a Tool	Click on the [R] hyperlink under the Action column in the List View, to do a miscellaneous receipt of a tool.
Return a Tool	Click on the [U] hyperlink under the Action column in the List View, to return a tool which was issued earlier.
View Transaction History	Click on the [H] hyperlink under the Inquiry column in the List View.

Scheduling

<i>Transaction</i>	<i>How To?</i>
Create a PM Template	Click on the Add PM Template sub-module.
Create a Schedule in a PM Template	Select the Schedule tab in a PM Template. Click the Add button. You can create multiple schedules for each PM Template.
Create PM Work Orders automatically	Using the Generate WO sub-module, select your PM Templates and click the Generate button. This process will create scheduled work orders automatically based on your PM Template schedule rules.

Support

How to Report a Problem?

Email

To report a problem or to request more information, just send an email to support@eam2go.com. In your email, please state in the;

1. **Subject:** Short description of your problem.
2. **Body:**
 - a) Detail description of your problem.
 - b) Your username and domain.

Telephone

Telephone support is not available for Free Edition users.

All **eam2go Free Edition** support incidents will be responded within **48 working hours**.

Feedback

Your feedback is important!

Please help us improve our service level and product quality, by giving us your frank opinion or suggestions via email to feedback@eam2go.com.