

MaintMaster® Database Guidelines

These are guidelines on how to prepare or build a new database in MaintMaster. Read entire document before beginning. This should not be regarded as a full instruction, but only a guideline to avoid pitfalls and to take advantage of some powerful features of the system.

We're constantly evolving. Any specification may be altered at any time.

Categories

MaintMaster is built around the notion that each category is a different type of item. This is true both for Site object, Spare parts and Jobs. When it comes to Jobs, think of category as a way to determine the routine. The routine could depend on other things as well, like Priority. In this regard, even though you can use category as work type, this is not how MaintMaster is built.

Another way to put it is that the category should be the obvious and intuitive distinction between different kinds of jobs for those who create the job. For the technician completing the job, the Completion code should be used to complement the category.

Selections

- Create base selections for each table type. Define common columns, give very good description. Test these selections very well, all settings will be used as default settings for any sub-selection created based on them. Pay attention to a very important difference in how MaintMaster inherits the data, but only copies default for selection elements. This means that the records selected can later be changed from the base selection, but all settings regarding columns, filters, and other visual elements only are used as default for sub-selection and subsequent changes will have no effect on the children. Try your selections and test this so you are sure how this work.
- Create base selections, based on these above, for major different categories. Extend the settings for columns, give description and a set of well thought conditions.
- Use the base selection to create selections to support the way the customer needs to work. This assumes that you previously have determined the routines to be supported, which is highly recommended.
- When there are selections (especially for jobs or purchases) that will need sub-selections for different time periods, consider using the Time line for a Selection of the entire data and sub-selections with fixed time periods, like Next week.
- If sub-selection for different responsibility is requested, use the selection Filter setting of Responsible instead.
- Consider locking the end-user from changing grouping and sorting for selections that really should look the same for everyone (for instance when the routine says a user shall pick the topmost record)
- Consider aggregation on certain columns to summarize or count records, especially when grouping.
- Consider giving the end-user more flexibility by setting filters on the tab Filter setting. However, also consider the potential confusion with too many options!
- Nice icon and good description are not only used within the selection. Every selection group will also show all description. This gives the user a very good overview of how the system works, if well described.

Search selections

In MaintMaster you define all search selections yourself. To make this really good, and easy to maintain, it's recommended that you create them from Base selections but keep them in one single Selection Group, preferably named Search Selections. Also make sure they're hidden from any other usages, i.e. not assigning them to Roles and hiding them from yourself.

Some tips:

- The search function uses the Full text filter function in selections and therefore works exactly like the filter you're used to. You should therefore consider using as many columns as possible where the user might want to search for information.
- The search function also searches the description field for all items (just like the filter function does)
- The filter also works with dates and numbers. Therefore, you might want to be a bit careful with adding too many columns of the same kind, like dates. However, the functionality searches in the formatted view of the column, so if you for instance add a date column with Colloquially format you can search (filter) for the text "Yesterday" to show all records with that date from yesterday.
- If a new user defined property is added, this column must be added manually to the search selection to be included in the search function. This might require a routine, so this is not missed in the future.

MaintMaster App

The MaintMaster Smartphone App shows all information you're accustomed to from the Admin client. The selections you assign to roles are the exact same shown in both Admin client and Smartphone App. However, since it's a smaller form factor, you need to configure what columns to show, and their order, for each selection. Default value, the first available columns, might be the right choice for your desktop experience, but often not in the app. There's also an individual setting for each selection to hide it in the app, not to clutter the interface.

All selections in the app only shows first 100 records. But there's a text filter to search for the records you want. Just like all selections, the filter works with all selected columns. So even if the column is not available in the app, it will still be used if selected in the desktop at design time. Please note that fixed groups are excluded from selections when shown in the app. Sort order is the same as in desktop.

MaintMaster shortcuts

For easy access to major functionality in MaintMaster, shortcuts can be configured. These shortcuts to MaintMaster are highly configurable. These shortcuts are filled with Categories and Selections. The categories are just like the Quick Task Menu items inside main client. For each selection, the end-user has the same tools available as in same selections in main client, only permissions will limit what the users can do.

Once again, it's a good practice to separate these selections from any other. Design special MaintMaster shortcut Selections, base them on Base selections and hide them from any other usage, preferably in their own Selection Group. Shortcuts does not take Roles into account, only profiles.

There is a limit to how many Categories and Selections can be added to a MaintMaster shortcut, (8 Categories, 16 Selections). This might change in the future, but it's a fixed number of possible slots. Be careful and test your selections thoroughly, it's important that they are intuitive and easy to use!

Special KPI's and Statistics

In MaintMaster there are some advanced predefined reports showing important and standardized KPI's such as MTBF and the distribution of different types of maintenance. These are based on international standards (EN13306) and require some settings to work correctly.

First of all, Downtime Management must be switched on to be able to register any downtime. This is a prerequisite for some of these reports. This is done in System Settings. Second, you must clearly define some major types of jobs. These are specified in System Settings under Statistics. You do this by creating Selections. And once again; use base selections and be careful with your definitions. In this case the reports will always use completed jobs. This means that the preferred way to specify different types of jobs are to use the Completion codes, maybe in addition to category, priority and, if you have special needs, some other property.

Finally, since these reports are quite hidden, you might want to create a Selection group where you add all kinds of interesting information such as cost analysis, charts and follow-ups. Among these you can add Object selections designed to show these reports on Print out. As an example, it might be a good idea to create a selection with Main objects only, since it's only these that will have Down time (and therefore Availability).

Remember to create these selections without any fixed restriction in time, but with a date set for the Time line filter. The report will use the selections to find out information for many different time intervals. By default, all reports will show data from the last year divided on each week for last quarter, then quarterly back to a full year. Typically this date should be Completion date.

Also, some of these selections need to have some advanced settings. When you try to add them, you will be notified if there are any settings missing. The ones used are Site object filter in Filter settings and Record link field in Advanced settings. Typically these should be Main site object for both.