

Ron Oimoen

BAAC-DATABASE.COM

Welcome and thank you for trying our *ZUD CMMS MS Access database* program. Our email is baac@pstcorp.com and phone is 352-258-2594.

For ZUD support, the office is staffed from 8-5 PM Monday through Friday Eastern Standard Time. Your purchase includes assistance with getting the program installed/running on a single PC. BAAC, Inc. also offers low cost annual phone and/or email support that also includes:

- Import of Equipment/Inventory/Vendors information
- Add Logo
- Training as needed
- Responses to your phone/email questions/problems, if not immediately, we average within 2 hours we will return your email/phone.
- Once click Off site data backups, if ftp transfers are allowed.

To view our Standard Costs for Support and other services, visit:

<https://www.baac-database.com/program-support/support-pricing>

Regardless whether you opt for our support, we would appreciate any feedback on the program, email us at baac@pstcorp.com . We use this data to continually improve and update the program.

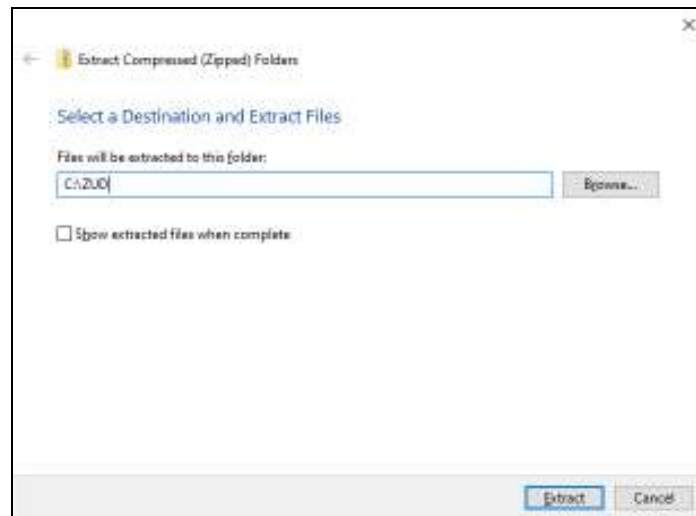
ZUD Install

Should you need assistance with installation please email us at baac@pstcorp.com . You may need to allow us to remote connect to your computer remotely for this assistance. We currently use Distant Desktop for this and can email you instructions. It is simple one file .exe needed to remote connect. English only please. Ron also provides full design versions of our database applications. If you would like a procedure to convert to a .accde just perform a save and publish function.

1. If you do NOT have MS Access, Click the link on our website to download MS Access Runtime <https://www.fmsinc.com/MicrosoftAccess/runtime/index.htm> . The link will take you to a site offering free downloads of a variety of MS Access Runtime versions. There are both 32 bit and 64 bit versions; the ZUDinstall.zip file contains applications for both versions.
2. On the CD is both a ZUDfiles.zip and ZUDinstall.exe, the .exe will auto install to C:\ZUD and provide an option for a shortcut and open the program when complete, then go to the NOTE just before step 10. For those that prefer unzipping manually, use the .zip file and continue.
3. Right Click the ZUDfiles.zip file and select "Extract All"

4. Change the path where you will unzip the files to C:\ZUD (you can turn off show extracted files when complete), then click Extract at the bottom, the form will look like this:

NOTE: Never Repeat the Extraction after you have started Data Entry. It will overwrite any existing data. Now you can unzip to a different location like C:\ZUD\Copy if you just want some refreshed files like the application or support files and copy/replace then in the C:/ZUD folder. **Never** copy/replace the **ZUDdata.mdb** file.



5. Now go to C:\ZUD folder and find the file ZUD.accdb (for MS Access 32 bit) or C:\ZUD\64bit and find the file ZUD.accdb (for MS Access Runtime 64 bit). Right Click the file and select Copy.
6. Go to your desktop and Right Click an empty space and select Paste Shortcut, NOT just Paste but Paste Shortcut.
7. You may right click the new shortcut and rename if desired.
8. IF you installed MS Access Runtime go to the C:\ZUD folder and run the AddPath.exe if you installed Runtime 2007, OR for other versions run that AddPath file. Note AddPath2016.exe is for both Runtime 2016 and above.
9. Open the new shortcut just created.

NOTE: IF you receive a message that the database was created with a 32 bit version, this means you have Office 64 bit, go to C:\ZUD\64bit and use ZUD.accdb in place of C:\ZUD\ZUD.accdb in step 4-7 above.

IF you receive an open warning click OK to open, then C:\ZUD must be set as a trusted location (step 10-19), in the event you did not do step 8 or perhaps did the wrong one.

10. The **ZUD** Log on form will load, **IF you did NOT** install Runtime and have the full version of MS Access. Then follow this **ONE TIME** procedure to set C:**ZUD** folder as a trusted location.

Setting Trusted Locations for MS Access:

11. For Access 2007, click the Microsoft office icon in the upper left, then click Access options
For Access 2010/2013/2016/2019 and above, click File, and then click Options
12. Click Trust Center on the left
13. Click Trust Center Settings on the right
14. Click Trusted Locations on the left
15. Click Add new Location near the bottom right
16. Type in the path or copy paste this --- C:\ZUD
17. Check the box labeled "Subfolders of this location are also trusted"
18. Click OK
19. Click OK, Click OK
20. Close MS Access
21. Reopen the program via the shortcut created in step 8
22. Click Auto Login to open the main menu or if you prefer: the user ID is **Admin**, then **Press Enter** on your keyboard.
23. The user password is **Super**, then **Press Enter**

NOTE: If you want to remove the program from your PC, simply delete the entire C:\ZUD folder. There will also be command buttons to open the Reference Guide to assist in setting up and using the program.

24. The Main Menu will load. Here is a quick getting started guide:

NOTE: Ron offers data import services, should you desire to avoid data entry time and have your data in an electronic format, contact us at baac@pstcorp.com for a low cost quote. Most data imports can be completed for less than \$100.00 and is included should you decide purchase 1 year of support.

SETUP EMPLOYEES/USERS

- 1) Click Administration
- 2) Click 3-Employee/Training Records (Blue Text)
- 3) Enter Employees, First/Last/etc.
 - a) IF they will use ZUD, enter their user name
 - b) IF they will be assigned to Work Orders, check that box
 - c) IF they can self assign to Work Orders (New WO entry on Main menu, check that box)
 - d) Click Employee Permissions in the upper left for those with a ZUD user name
 - e) Turn OFF those area of the program the user will not have access to, then close and

Repeat for each ZUD user.

- 4) IF you wish to track Labor Costs, you need to assign a skill to any Employee who will be assigned to Work Orders, if so click the Maintain Skill levels at the top
- 5) Enter a skill, i.e. Welder, Technician, Supervisor, etc. and then enter an AVERAGE hourly rate, ZUD does not maintain employees actual salary.
- 6) Close when finished
- 7) Assign the skill to any ZUD user who will be assigned to Work Orders.

RETURN TO THE MAIN MENU BY CLICKING CLOSE IN THE UPPER LEFT

EQUIPMENT ENTRY, The first thing is to get at least an equipment description and an equipment keyword entered. This will at least allow the creation of work orders for that ticket either using the create repair task or User WO request on the main menu. Additional Equipment detail, Location and PM assignments can follow.

- 1) Click Equipment/Property Master
- 2) Enter an Equipment/Prop Description
- 3) Select a Keyword (VERY IMPORTANT FOR FAILURE ANALYSIS)
 - a) If the Keyword desired is not in the list, click Keywords, middle top
 - b) Enter a keyword, keep it simple, i.e. a crane is a crane regardless of who makes it or it's specifications.
 - c) Close after entering the keyword desired and repeat step 3
- 4) Repeat step 2/3 until all equipment is entered

Those 2 fields will get you started faster and get work orders created so you have history.

NOTE: Stay on the equipment master list for PM setup.

PM SETUP

- 1) Click Categories at the top, enter a PM-Complete category (you can use this as you complete each equipments PM setup and when finished use categories as desired)
- 2) Start with the most import equipment for PM's and double click that equipment description
Or click View/Edit Detail at the top, this opens the equipment detail form for that equipment
- 3) Click Attach PM/Cal's at the bottom
- 4) Select the PM desired
 - a) If the PM desired is not listed, click Add New Master Listing at the top
 - b) Enter a brief description of the PM, i.e. Change Oil, do not do change oil on crane or Quarterly Oil Change, just Change Oil

c) Click Close and IMPORTANT, click Refresh List button at the top, the new PM Master will now be listed and REPEAT step 4

4) Click Attach to Equipment, open PM detail form for that equipment

6) MOST important, enter Frequency in days (recommend a minimum of 7 days, weekly) AND just below the date it was last done (this is REQUIRED for Auto PM Creation)

a) You do have an option for Hours and Cycles/Miles in the event you have meters on the equipment, you can do one or all, whatever event occurs first will trigger the PM Work Order to be created.

7) In the PM summary box you can enter the procedure OR do later, all you need is frequency and date last done, just like equipment fields, other PM data can be entered later.

8) Close

9) If there is more than 1 PM i.e. you have a quarterly and an annual PM to do for this equipment, REPEAT steps 4-8

10) When all PM's have been entered, click close

11) OPTIONAL and can be done later

a) click View PM/Cal's button at the bottom, you will see the PM's listed that were added above

b) click PM detail button at the top for any of the PM's listed

c) You can select a preferred Vendor if this PM is done by an outside vendor (Note Vendors must be added from the Main Menu)

d) You can add the inventory needed to complete this PM (note inventory must be added from the Main Menu)

e) In the Document(s) field you can hyperlink to a folder or file that is related to this equipment/PM combination.

f) Close and close to return to Equipment Detail form

12) Click Close and select the category PM Complete (from step 1 above)

13) Select another item of equipment and repeat Steps 2-12, do this for each item of equipment that required PM's

ONCE EQUIPMENTS HAVE PM'S ASSIGNED YOU CAN NOW AUTO CREATE WORK ORDERS

(Recommendations are to click the Create PM's due on a WEEKLY basis, either close of business Friday or Beginning of Day Monday)

1) Click Create PM's due/Repeat Work orders (Note repeat work orders is a capability when manually adding a work order to repeat it, do not use this repeat work order as an alternative to PM setup)

2) A review form will open showing all PM's due (Note, if a PM currently has an open work order, the program WILL NOT create another PM, the last PM must be completed before

another PM work order will be created--this is where the PM performance report comes into play)

- 3) You have the option to turn off the creation of a work order by un-checking the box, after review, click the Continue>Create New Work Orders at the top and click OK to the message.
- 4) You are now ready to Manage Work Orders, which is the next and last step to this Getting started procedure.

OPEN WORK ORDERS-COMPLETING THE WORK

- 1) Click the Open WO Tasks button on the main menu
- 2) Select the desired option and click OK
- 3) Listed are all work orders that need to be completed
 - a) You can assign a primary employee and other employees and enter the hours worked
 - b) Adjust due dates
 - c) Use scheduling if you are using planning / Scheduling procedures
 - d) Most work orders can be closed from this list but you do have the option to double click a WO to open up the detail and enter data there-MUST BE DONE TO ADD ANY INVENTORY USED AND INVENTORY MUST BE ENTERED
 - e) Assign a primary vendor who will do the work (note this is just the primary, you can log time/material for multiple vendors on one work order
- 3) Decide from the green buttons at the top which reports you want, the purpose being to assign the work and complete it.
- 5) Once you complete a work order you can select Closed using the status selection (note complete status keeps the work order in the open work order list, closed will prompt the user for information and move the work order to Closed WO tasks on the Main Menu)
 - a) After selecting close, enter any comments about the work, enter the downtime hours that occurred (note, something can be down for 24 hrs but only take an hour of labor)
 - b) Closing a "Repair" work order will require the entry of Symptom / Failure/Action / Cause codes, if the one desired is not listed, click Add New, enter and close
 - c) If a vendor is assigned, you can log vendor time/material
 - d) Other then Repair work orders, only comments and downtime hours are suggested entries
- 6) Continue and Close (note the work order stays on the list until you leave the open work order task list, when you return the work order will no longer be listed)

CLOSE WORK ORDERS-Suggestion is to review this list once each week

- 1) Click Closed Work Order Tasks
- 2) A list of "unapproved" closed work orders will be listed

- a) Click approved checkbox to move the work order to the approved list (note buttons at the top)
- b) If the work order is not complete you can UN check the closed box to return the work order to the Open WO task list to complete

THAT ENDS THE GETTING STARTED DATA ENTRY/MANAGEMENT PROCEDURE, OTHER PROCEDURES/FUNCTIONS IF ASSISTANCE IS NEEDED REQUIRES ANNUAL SUPPORT OR A ONE TIME SERVICE FEE, OTHER FUNCTIONS MAY INCLUDE:

- AREA/CLIENT
- PROJECTS
- INVENTORY (SPARE PARTS, PURCHASE REQUISITIONS)
- DOCUMENTS
- VENDORS
- EMPLOYEE TRAINING

You can now use the other functions with the Quick Reference Guide to go thru the program.

Regards,

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