

Assist
I.T. Solutions
I.T. Solutions

User Manual

Mainten-Ace
& Integrated AttendAce



Table of Contents

Mainten-Ace	6
The Mainten-Ace Main Screen	6
Company Groups And Depots in Mainten-Ace	7
Groups:	7
Depots:	7
Globally Restricting Mainten-Ace to one Group or Depot	7
Photograph Uploads	7
Restricted User Accounts	8
Checking Your Mainten-Ace Connection Status	8
Off Line Mode	9
Data transit status	9
Printing Reports	10
Getting Started	10
Mainten-Ace Accounts	10
Setting up a Mainten-Ace account on your PC	10
The Mainten-Ace Initialisation Setup Wizard.	11
Mainten-Ace User Accounts	11
Creating users and changing privileges	11
Creating a new User Account	12
Editing a User Account	13
Deleting A User Account	13
Logging in to Mainten-Ace	13
Logging in as a Different User	13
Creating And Editing Entities (and Trailers)	14
Creating a new Entity	14
Editing An Entities Details	15
Creating a new Trailer	16
Importing Trailers From Your Existing System	16
Editing Trailer Details	17
Creating and Editing Employees	18
Creating a New Employee	18
Employee Details Tab	18
License / Ins / www. Tab	18
Employee Driving License Images	18

Mainten-Ace Mobile, employee internet access setup _____	19
Allowing employees to log their own mileage using Mainten-Ace Mobile _____	19
The Cards, Notes and Photos Tab _____	20
Employees Photo _____	20
The AttendAce Holidays Tab _____	21
The Training Tab _____	21
Uploading and viewing Employee Training Certificates _____	21
Importing Employees From Your Existing System _____	22
Editing an Employees Details _____	23
Assigning Drivers To Vehicles _____	23
Un-allocating previously paired vehicles and drivers _____	24
Viewing Employee Training / Qualifications Due for Renewal _____	24
Generating the Employee Training Matrix Excel® spreadsheet _____	24
Services _____	25
Adding services _____	25
Adding Services for entities serviced by date: _____	25
Adding Services for entities serviced by mileage: _____	26
Logging Vehicle Mileages: _____	26
Adding Services for entities serviced by hours used: _____	27
Completing a service _____	27
Deleting a scheduled service _____	27
Uploading an Entities Service Certificate _____	27
Providing A Service Cost Break-down _____	28
Viewing Vehicles / Trailers Due for Service by date _____	30
Viewing Entities Due for Service by mileage _____	30
Viewing Entities Due for Service by hours usage _____	30
Viewing VED, Insurance and MOT due _____	31
Printing a Vehicle or Trailer service schedule _____	31
Defects and Service Items _____	31
Logging a Defect or Service Item _____	32
Viewing Defects, Printing Defect Reports and Completing Defects _____	32
Viewing Defects _____	32
Printing a defect report _____	34
Accidents _____	34
Logging an Accident _____	34
Adding Photographs to an Accident _____	34
Delete a Photo _____	35
Viewing Accidents, Printing Accident Reports and Completing Accidents _____	35
Viewing Accidents _____	36
Logging an Accident as completed _____	37

Deleteing an Accident _____	37
Printing a defect report _____	37
<i>The Integrated AttendAce Employee Holiday Scheduler</i> _____	38
Viewing Employees Unavailable For One Specific Day _____	39
Logging Employees as Unavailable (holiday / sick/ off without pay) _____	40
Viewing and Printing Employee Unavailability _____	41
Deleting a Previously Assigned Holiday, Sick Day or Day Off Without Pay _____	41
Showing One Employees Availability In The Calendar _____	41
Setting up Holiday Restrictions _____	42
Global Holiday Restriction _____	43
Seasonal Holiday Restrictions _____	43
Setting up Holiday Allowances _____	43
Setting a Depots Year ‘Start Date’ for Holidays _____	44
Changing the Standard Calendar Colours _____	44
Setting specific dates as AttendAce special days _____	44
Compulsory Holidays vs Non Work Days _____	46
Cancelling a special day _____	47
Returning to the Default Calendar View After Setting Special Days _____	47
Special Days in Default Mode Calendar _____	47
‘Non Work Day’ Days _____	47
‘Give 1 Day in Lieu’ Days - How To Give an Employee a Day In Lieu _____	47
Cancelling a Bank holiday from an employee _____	47
<i>Database tools</i> _____	48
<i>Compacting and Repairing the Maintena-Ace database</i> _____	48
<i>Zipping up the database</i> _____	48
<i>Configuring Mainten-Ace</i> _____	49
Setting the ‘Week Commencing Day’ _____	49
Adding and Deleting Fitters and Service companies _____	49
Add a Servicer _____	49
Deleting and Amending Servicer _____	49
Adding and Deleting Vehicle and Trailer Status’s _____	50
Add a Vehicle / Trailer Status _____	50
Deleting a Status _____	50
Adding and Deleting Employee Status’s _____	50
Add an Employee Status _____	50
Deleting an Employee Status _____	50
Adding and Deleting Trailer Types _____	51
Adding a Trailer Type _____	51
Deleting a Trailer Type _____	51
Setting up your Insurers Details for automatic emailing of accidents _____	51
Creating Service Item Categories _____	51
Renaming a Service Item Category _____	52
Deleting a Service Item Category _____	52

Setting the Tachograph Calibration and Check periods _____	52
Adding Company Groups and Depots _____	53
Creating a Company Group _____	53
Deleting a Group _____	53
Adding a Depot to a Group _____	53
Creating and Deleting Entity Types _____	54
Creating Entity Types _____	54
Deleting Entity Types _____	55
Creating and Deleting Training Types _____	55
Creating a New Training Type _____	56
Deleting a Training Type _____	56
Amending a Training Type _____	56



Mainten-Ace

Firstly, thank you for using Assist IT Solutions software. We hope you enjoy many years of effortless use of our software.
Please use the find feature in your software to quickly find what you need in this manual.

The Mainten-Ace Main Screen

The main Mainten-Ace main screen consists of the Menu System and ToolBar at the top of the screen and the StatusBar at the bottom of the screen.

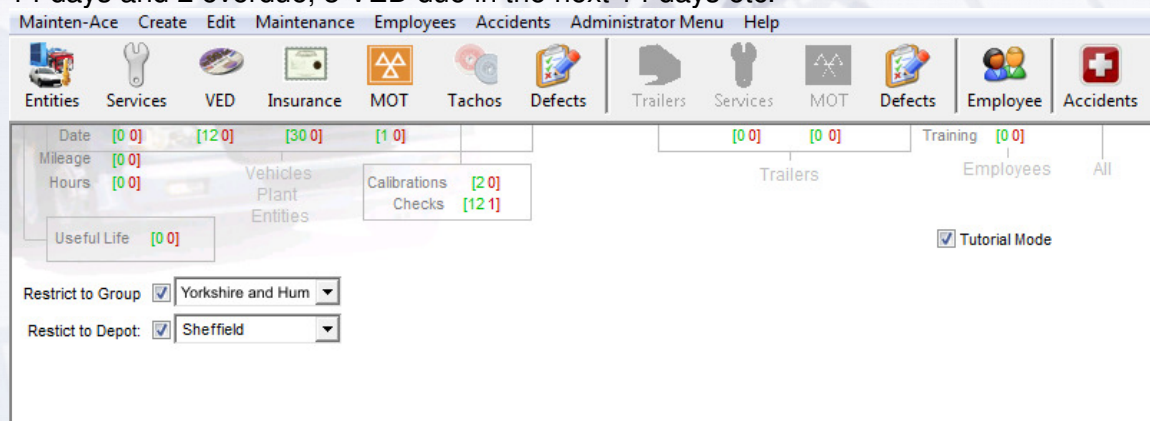
The Menu is used to access the every Mainten-Ace screens.

The ToolBar consists of several icons and is a quicker way of displaying some screens. The icon buttons on the left hand side of the toolbar relate to vehicles and the three icon buttons on the right hand side relate to trailers.

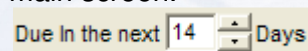


The main screen also displays the status of all your fleet at a glance. Underneath some buttons on the main screen toolbar are a green and red numbers. These numbers inform you of the corresponding button.

The green number shows the number Due in a specified number of days and the red number shows the number Overdue. In an ideal world the red numbers should always be zero. In the example here you can see that there is 1 vehicle service due in the next 14 days and 2 overdue, 3 VED due in the next 14 days etc.



The green numbers by default show the number due within 14 days. However you can change the number of days from the Due screens. For example to change the Vehicle VED due days, click on the Vehicle MOT button and then change the Due in the next x Days text box. Whatever this screen shows will be shown in the green number on the main screen.



The Status Bar at the bottom of the screen displays (from left to right) the user account currently logged in to Minatne-Ace, the Mainten-Ace Account being used, the number of Vehicles with no certificate on file and the number of pending defects for trailers (T) and Vehicles (V)

User: Administrator	Account: A Company	No Certificate: 35	Defects: T: 0	V: 4
---------------------	--------------------	--------------------	---------------	------

Clicking on any of the values on the status bar will show you the corresponding vehicles or defect reports list.

Company Groups And Depots in Mainten-Ace

Within Mainten-Ace it is mandatory to assign Vehicles and Employees to a group and depot. This has many benefits and implications for multi-depot company's.

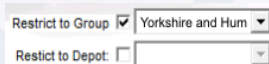
Depots are created and assigned to a group.

Groups: A group could be something like North East or Yorkshire or even a company if you have decided to operate all your companies from the one Mainten-Ace account. If you do not want or need to segregate your depots into more than one group, simply create one group with your company name. To save you time and hassle, if you only have one group, Mainten-Ace will automatically select that group for you on any screen that requests a group selection.

Depots: Depots are assigned to groups so for example you may have created a group for Yorkshire and you may have a Leeds and Sheffield depot that are within that group. Vehicles and Employees are assigned to a depot to allow you to logically group your vehicles into groups that reflect real life and

Globally Restricting Mainten-Ace to one Group or Depot

If your user account entitles you to view more than one group or depot (see Restricted User Accounts below) Mainten-Ace allows you to globally specify the group or depot you would currently like to work on. To globally select the current Group or Depot, select a group or depot from the 'Restrict to Base' and 'Restrict to Depot' feature on the main screen.



To select a global group selection, click the 'Restrict to Group' check box on the main screen to enable the pull down and then select the group from the pull down. If you un-tick the checkbox, the pull down box will be cleared of your current selection and be disabled. In order to globally select a depot, you must first select the group in which that depot is assigned and then click the 'Restrict to Depot' checkbox and select the depot from the pull down. The pull down will only show depots that are assigned to the group you have selected in the 'Restrict to Group' pull down.

In our example here, we have selected the 'Adwick' group so when we open any screen that allows selection of a group or depot, the group selector will automatically be set to 'Adwick' for us. You can however, override the depot restriction in any screen after it is automatically selected by Mainten-Ace.

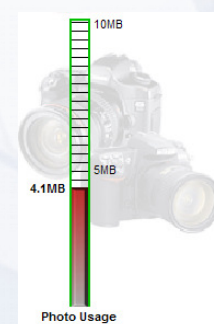
This feature is useful if you have access to multiple depots but are only concerned with a one specific depot at this moment. When you no longer need the restriction, switch it off.

Photograph Uploads

Mainten-Ace will allow you to save / upload photographs for employees, employees driving licenses and accidents.

You will be allocated a certain amount of space for uploading your photographs to the Mainten-Ace server. Your server space utilisation is displayed on the main screen.

If you exceed this limit, you will be billed a reasonable fee for each additional megabyte of space used.

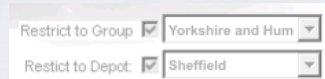


You can use less space on the server by making sure your photographs are not too large.

This gauge, displayed on the main screen shows a graphical representation of how much space your photographs are using on the server.

Restricted User Accounts

Administrator users can restrict a specific user account so that it only has access to either one specified group or only one specified depot within a group.




This image shows the main screen restriction options when a user with a restricted account logs in. The user account has been restricted to only show the 'Thorn' depot. You will notice that the pull downs and the check boxes are disabled. When this user opens a screen that allows you to restrict the vehicles or employees to a group or depot Mainten-Ace will only show vehicles or employees from the 'Thorn' depot and the group and depot selection pull downs will be disabled.



Restricting user accounts is a Mainten-Ace security feature to ensure that only the correct people can view and edit the vehicles and employees that they have responsibility for. In our example, we have an employee that we want to log the vehicle servicing for the 'Thorn'

Depot only. This user will only be able to view and edit vehicles and employees from this group. In fact, an administrator user could easily prevent this user from doing anything other than logging services for the Thorn depot by simply switching off all other menu items for vehicles, MOT, Insurance, Trailers, employees, etc

If you have upgraded from a previous version of Mainten-Ace you may see this icon on the main screen  under either the vehicle or employee toolbar item. This icon indicates that you have vehicles or employees that have not been correctly assigned to a depot. Clicking these icons will open up the vehicle or employee screen and display all the vehicles or employees not assigned to a depot.

Because Mainten-Ace will only vehicles or employees once a group or depot filter has been selected this is the only way to view vehicles or employees that have not been assigned to a depot.

Checking Your Mainten-Ace Connection Status

Mainten-Ace operates over the internet on any PC or Laptop with an internet connection with no need for slow overly complex VPN connections.

The bottom Left of the Mainten-Ace main screen displays your current connection status to the Mainten-Ace central server.

Here is how you want this display to look at all times!



However, there are two points of failure for your connection to the central server. These are you have no internet connection or you can not reach the server.



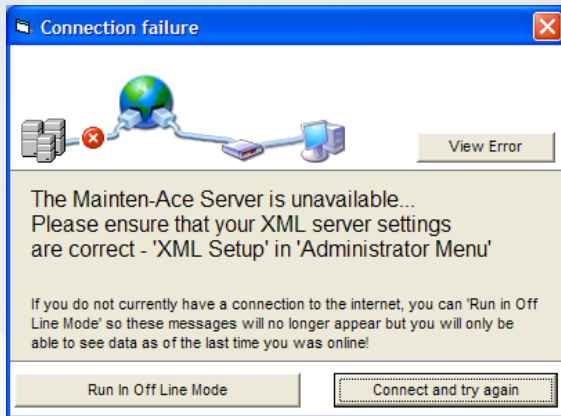
The connection status display shown here is telling us that we do not currently have access to the internet.

In order to access the Mainten-Ace server to receive and save data you must re-establish

your connection to the internet.



The display here is showing us that we are successfully connected to the internet but we can not currently reach the server. This may occur when you first install Mainten-Ace if the server settings are not correct.



You will receive a message similar to the screen here if you try and access the data or save when you can not reach the server or you do not have an internet connection.

If you in the process of creating or editing a vehicle, trailer or employee and you lose your internet connection, when you try to save the changes you will receive a Connection Failure message. Don't worry, you can simply click on the 'Connect and try again' button and connect to the

internet and try again.

If you still have not established an internet connection, you will receive a 'Connection Failure' message every time you try to save, until you have a connection. If you can not manage to connect to the internet again, you will lose the changes or the vehicle, trailer or employee will be lost if you cancel out of the screen.

Off Line Mode



If want to access the information stored on your computer as of the last time you used it, but you do not have an internet connection, simply start Mainten-Ace and when you are told you have no internet connection, click the 'Run in Off Line Mode' button. You will now be able to access all the fleet data as of last time you were connected. Obviously there may be more up to date information on the server and you may not create or edit anything whilst in Off Line Mode. This is 'permanent offline mode', you will not be able to connect at all in this mode until you exit Mainten-Ace and then log back in.


Data transit status



Mainten-Ace keeps you informed of its status whilst downloading data or saving your changes to the central server.

The Mouse Pointer will change to indicate the current data transit status and the Connection Status display also changes to represent the status.

When data is in transit, either from or to the central server, your Mainten-Ace

Connection Status will display a clock above the 'World' icon  and an arrow will appear, showing the direction of the data:  to represent saving to the server and

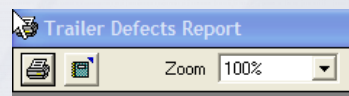
 to represent receiving from the server.

The mouse pointer will change to  when saving (uploading) to the server and  when receiving (downloading) data from the server.

You must wait whilst these icons / mouse pointers are displayed. With most connections, these icons will flash momentarily but for slower connection, for example dialup connections you may have to wait a short while whilst your data is being received or saved to the server.

Printing Reports

Most reports in Mainten-Ace display a Print Preview screen so you can check the print before sending it to the printer. To print the document, click the Printer button and then select the printer you want to print the report to from the Print dialog box and then click the Print button.



Getting Started

Mainten-Ace Accounts

Mainten-Ace XML works over the internet on any PC or laptop with an internet connection. You do not need a specific web browser or any additional software installed... Mainten-Ace is your internet browser for your fleet data.

Your computer needs to receive and save vehicle, trailer and employee fleet data to and from a central place where everyone else in your company can also access the data if other people are using Mainten-Ace to log fleet information. This central location is the Assist IT Solutions Mainten-Ace Server.

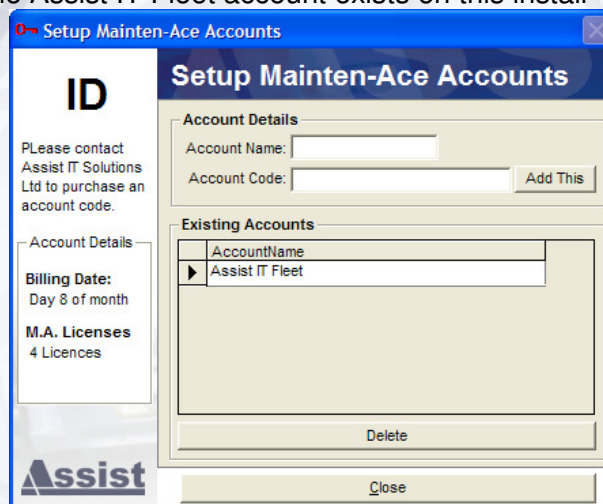
So all your fleet data is stored on the central server along with many other Assist IT Solutions customers, so how does your Mainten-Ace software know which vehicle, trailer and employee data to download and how does the central database know which vehicles, trailers and employees belong to your company? You need to setup a Mainten-Ace account and tell Mainten-Ace which account to use.

Setting up a Mainten-Ace account on your PC

Only Administrator users can handle Accounts in Mainten-Ace. To Create, View and delete Mainten-Ace accounts on your PC select '**Accounts**' from the '**Administrator**' menu to display the '**Setup Mainten-Ace Accounts**' screen.

Any accounts that you have created on this PC will be displayed in the '**Existing Accounts**' grid. You can see here that the Assist IT Fleet account exists on this install of Mainten-Ace. If you click an account in the grid, Mainten-Ace will show you the billing date and the number of Paid Licenses that account has. You can see in the '**Account Details box**' that the Assist IT Fleet has a billing day of the 8th of every month and currently has 4 paid licenses.

In order to create an account, you will need your account code from Assist IT Solutions Ltd. Simply type a description for the account in the '**Account Name**' text box and type (or paste) your account code into the '**Account Code**' text box then click the '**Add This**' button.



If this account has previously been initialized on the Assist IT Solutions Ltd server, Mainten-Ace will automatically download the existing user accounts for this account and then shut down. You should then restart Mainten-Ace to begin using it.

If this is a new account on the Assist IT Solutions server you will now be presented with the **'Users and Privileges'** window where you must create at least one administrator user account (see *Creating A New User Account* in this manual). Once you have created at least one administrator account you can then shut down Mainten-Ace by clicking the **'Confirm Mainten-Ace Account Creation'** button. You can then restart Mainten-Ace to begin using it.

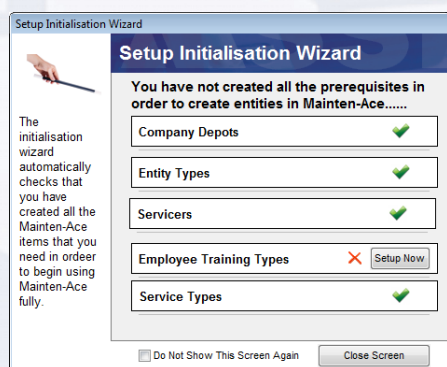
The Mainten-Ace Initialisation Setup Wizard.

Some settings and additional criteria need to be set or created in Mainten-Ace in order to create Mainten-Ace entities.

'Entity types' must be created before you can create an entity, 'Servicers' must be created before you can complete services etc.

When you first install Mainten-Ace, it will automatically display the 'Mainten-Ace Initialisation Setup Wizard' to help you in the initial setting up so that you can begin using Mainten -Ace.

The wizard simply checks that you have created or set a pre-requisites and will inform you of anything you still have to complete every time you start Mainten-Ace or until you click the 'Do Not Check This Screen Again' checkbox.



In our example here Mainten-Ace is telling us that we have not yet set up any 'Training Types'. These are needed in order for us to set up any employee training .

To setup 'Employee Training Types' from the Wizard screen, simply click the 'Setup Now' button.

Once you have created at least one criteria for each prerequisite Mainten-Ace will no longer show the Wizard on startup.

Once you have created at least on prerequisite item for each compulsory prerequisite you will then need to find the correct section in the 'Setup Screen' in order to create, edit or delete the relevant items.

Mainten-Ace User Accounts

Mainten-Ace is an advanced multi-user system that allows many users to access its data simultaneously. Users must log into Mainten-Ace using a user account with a unique username and password. User accounts have privileges assigned to them that allow a user to access Mainten-Ace's.

Only use Mainten-Ace when you are logged in on your user Account.

Creating users and changing privileges

Mainten-Ace uses User Accounts to restrict certain users from using certain features. Select **Users and Passwords** from the **Administrator Menu** to view the Users screen where you can Add, delete and edit user accounts.

Creating a new User Account

To create a new user, click the **New User** button then type the user name for the new user and the password in the text boxes (NB blank passwords are not allowed). Because the actual password is not visible on the screen you must retype the password in the ReType text box. This is a check to make sure you have not typed the password incorrectly.

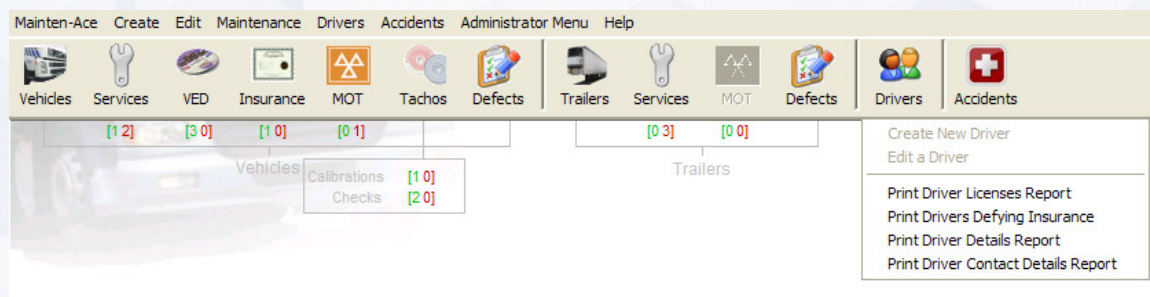
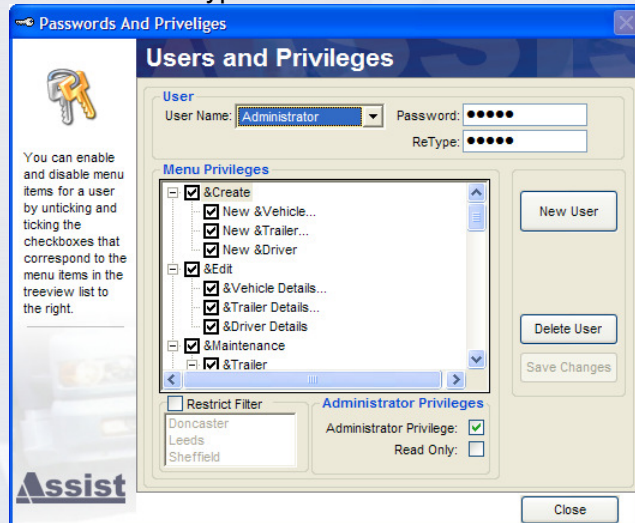
To allow the user permission to access the various menus in Mainten-Ace, simply click the check boxes that correspond with the menu items you want the user to have access to in the **Menu Privileges** List. Any check boxes containing a tick will enable these menu items for this user.

To give a user Administrator privileges, tick the **Administrator Privilege** check box in the **Administrator Privileges** Box. Administrator users can be allowed to roll back jobs and view user logs by checking the relevant check boxes. Setting a user account as Read Only by ticking the 'Read Only' checkbox will prevent this user from being able to change anything irrespective of what privileges you set in the 'Menu Privileges' section. All save buttons will be disabled in all edit screens and the 'Add Service' buttons will also be disabled in the service screens when logged in using this user account.

If you have more than one depot on one account in Mainten-Ace, the 'Restrict Filter' checkbox feature allows you restrict this user so that they can only view and edit entities from one depot. All 'Depot Selector' pull downs on entity screens will be automatically set to the depot you set as the 'Restrict Filter' on this screen and the pull downs will be disabled so the user can not choose a different depot. If you do not select this option, this user will be able to view all entities from all depots without any restriction.

To accept the new user, click the **Accept New User** button (not shown) or click the **Cancel New User** button (not shown) to cancel.

You can see that the user logged on here does not have access to the Trailer MOT or Creat or Edit Employees but can view and print all reports for employees.



Editing a User Account

To edit a users account, select the users user name from the **User Name** pull-down. NB the pull-down will not be visible in create user mode.

You can edit the users password and change any privileges by clicking the check boxes but the user name is not editable. Click the **Save Changes** button to save the users new settings.

Deleting A User Account

To delete a user account, select the user name from the User Name pull-down and then click the Delete User button.

Logging in to Mainten-Ace

Once you have created a Mainten-Ace account in Mainten-Ace and set up then created user accounts for your employees, they can then log into Mainten-Ace using their username and password.

After Mainten-Ace runs through its startup routine and initializes itself you will be presented with the Log In window.

If you have more than one Mainten-Ace account set up on this PC you will need to select it from the Account pull down.

You must then select the user name from the **User Name** pull-down list and type your password in the **Password** text box.

If you enter your password correctly, Mainten-Ace will then allow you to access the main screen.

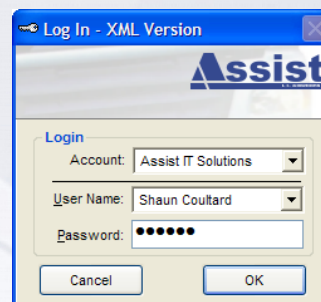
Mainten-Ace will only allow a user account to be logged in once at a time. If you attempt to log in using a user account that is already logged in Mainten-Ace will inform you that the specified user is already logged in and will allow you to attempt to log out that user account. You will Not be able to log the user out if someone is still actually using the account on another computer. This feature is available in the event that Mainten-Ace wrongly thinks that a user is still logged in, if for example Mainten-Ace previously terminated prematurely as a result of a system crash or power cut and Mainten-Ace did have the opportunity to log the user out.

Logging in as a Different User

You should always lock your Mainten-Ace when you are not at the computer, to prevent others from using Mainten-Ace using your user account. You can lock Mainten-Ace by simply pressing Ctrl and L on the keyboard simultaneously or selecting **'Log On As New User'** from the Mainten-Ace menu. This displays the logon window that you see when you first log in to Mainten-Ace. If someone clicks the Cancel button on this window, Mainten-Ace will shutdown.

If you want to use Mainten-Ace on a computer and someone is already logged in, you can press Ctrl And L on the keyboard simultaneously or select the **Log On As A New User...** menu item in the Mainten-Ace menu, rather than shutting down Mainten-Ace and restarting it.

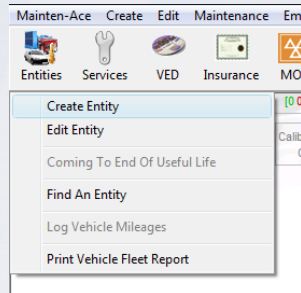
You will be presented with the login window that you see when you first log into Mainten-Ace where you simply log in as a new user by selecting the username from the pull-down, type the password, then click the 'Ok' button.



Creating And Editing Entities (and Trailers)

Creating a new Entity

To begin creating a new entity, click the Entities toolbar button on the main window and then select the 'Create Entity' menu item.

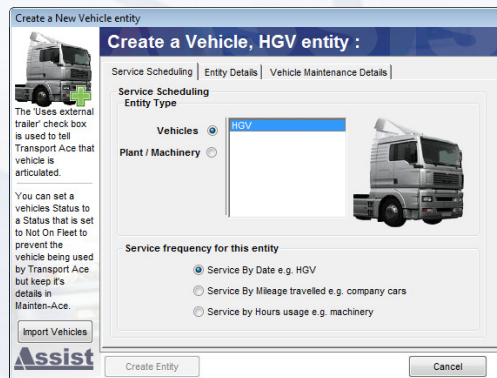


Mainten-Ace allows you to create entities such as vehicles, plant, machinery and any other entity type that you want to look after and schedule maintenance for.

By default, there are no entity types set up in Mainten-Ace. You must create the types of entity that your company will be servicing in the setup screen.

To create a an entity you must first select the class of entity e.g. vehicle by clicking the relevant option button. Mainten-Ace will then display all the Entity Types that you have created for this account for this class in a list box that will appear to the right of the class option button you clicked.

Click the entity type in the list box for the entity you would like to create and Mainten-Ace will display the icon / picture for that type of entity.



Entities can be scheduled for maintenance in one of three ways:

1. By specified date
2. By mileage
3. By hours used

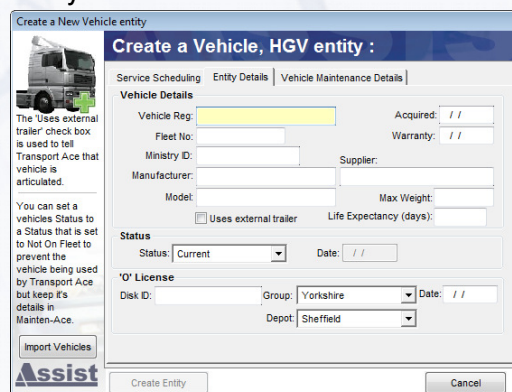
When you select an entity type here, the default service type will automatically be selected for you that you specified when the Entity Type was created in the Setup screen.

You can see in the example here that we are creating a HGV of the Vehicle class and

Mainten-Ace has automatically selected the 'Service By Date e.g. HGV' option for us. If we want to schedule servicing for this entity in a different manor we simply click on one of the other option buttons. It is important that we select the correct service schedule type here because this can not be changed later!

Once we have specified the basics for the new entity on the 'Service Schedule' tab here we now need to fill in the details of the entity on the 'Entity Details' tab. Simply click the tab to show the details tab.

Now, simply type all the vehicle information for the vehicle in the text boxes provided. The main details of the vehicle are added in the 'Vehicle Details' tab section. Maintenance details are added in the 'Maintenance' tab section. To switch between these sections click on the tabs at the top of the screen.



If you are creating a 'Plant / Machinery' class entity, you have now input all data required to fully create the entity.

However, if you are creating a Vehicle, there is a final stage of inputting its maintenance details from the additional 'Vehicle Maintenance Details' tab. Click the 'Vehicle Maintenance Details' and then input the 'MOT Due', 'Tax Due', 'Insur. Due', 'Last Calibrated' and 'Last Checked' dates that you provide on this screen in the 'Maintenance' tab section will be used by the reporting screens for that item. For example 'MOT Due' will be used in the 'Vehicles With MOT Due' screen.

The 'Certificate On File' checkbox should be ticked to show that you hold the certificate for the tachograph.

NB Mainten-Ace will automatically remove the 'Certificate On File' checkbox when the tachograph check / calibration becomes overdue.

NB If you are also using Transport Ace, the vehicle will also be available in Transport Ace. However, you can not view or edit the servicing information in Transport Ace for any vehicles, so the MOT, Tax, Insurance and Tachograph details can not be seen within Transport Ace.

When creating an entity, very limited information is mandatory, in fact, only the entity's name is compulsory, so if you quickly need to create an entity and then complete its full details later, this is not a problem.

Editing An Entities Details

Click the Entities toolbar button on the main window and then select the 'Edit Entity' menu item to open the 'Edit A Vehicle' window.

This screen is almost identical to the 'Create A Vehicle' window except that we have the Standard Mainten-Ace entity list to the left of the screen with the depot selectors for us to select the Entity we want to edit.

The other difference in the 'Edit An Entity' screen is that when viewing a vehicle, you can **Assign a Driver to the Vehicle**. At the bottom of the screen you will see the currently assigned driver. You can click the 'View' button, to the right of this to quickly open the corresponding driver in the 'Edit An Employee' screen.

You can also change the currently assigned driver by clicking the 'Change' button to the right of the 'Assigned Driver' text box. N.B. you can not change the driver directly on the 'Edit A Vehicle' screen. Please see 'Changing Driver and Vehicle Assignments' to see how to use the 'Assign Drivers To Vehicles' screen.

Once you have made changes to a vehicle's details, simply click the **Save Changes** button.

You can add new O'Licences and O'Licence depots in the Setup screen (see: Adding And Deleting O'Licences)

Creating a new Trailer

To create a new Trailer, click the Trailer toolbar button on the main window and then select the 'Create Trailer' menu item.

Simply type all the trailer information for the trailer in the text boxes provided then click the '**Create Trailer**' button.

Setting the '**Trailer Type**' is important if you use Transport Ace. Transport Ace can be told to only allow trailers of a certain type to be assigned to a specific delivery. This is where Transport Ace will look if a trailer type is specified.

You can add new Trailer Types in the Setup screen (see: Adding and Deleting Trailer Types)

You can add new Status's in the Setup screen (see: Adding and Deleting Vehicle and Trailer Status's)

The 'MOT Due' date that you provide here is used by the '**Trailers With MOT Due**' window.

The '**Status of this Trailer**' defaults to current. You can set the status to sold or scrapped at a later date. Setting the status to something other than Current allows you to identify the status of vehicles for your reference and also, the Services window allows you to 'show only trailers of Current status.

Importing Trailers From Your Existing System

Mainten-Ace now allows you to import Trailers from your existing system.

In the Mainten-Ace folder on your PC, you will find three .CSV files. To Import trailers into Mainten-Ace, you will need the

MATrailerImport.CSV file. Simply open this file using your favourite spreadsheet application and then paste your trailer details into the corresponding columns in the CSV file. Be sure to save the file as a

CSV file when you save it. If you save it as any other format, this will cause errors and the trailers will not be imported.

To import, the trailers from the CSV file, open the '**Create / Edit A Trailer Screen**' and click the '**Import Trailers**' button at the bottom left of the screen. You will then be asked to locate the **MATrailerImport.CSV** file that contains all your trailers. If the file is in the default Mainten-Ace folder you should be able to see it straight away, otherwise, you may need to browse to the correct folder. Click the 'Open' button to open the CSV file and import it's contents to Mainten-Ace.

If all the trailer details to import are ok you will be informed that the import process was successful. If there are any import errors with any of the trailers in the CSV file, you will be informed of the trailer that is causing the error and no trailer will be imported.

Editing Trailer Details

Click the Trailer toolbar button and then select the '**Edit Trailer**' menu item to create a new Trailer.

To edit a trailer, select it from the **Trailer** pull-down list and the text boxes will then enable and contain the current details of the selected trailer.

If you use Transport Ace, you can limit the list of trailer to only show trailers that are on your fleet i.e. ignore agency trailers. Tick the '**On Our Fleet Only**' check box above the '**Trailer**' list, to restrict the list.

Simply change any details then click the **Save Changes** button.

You can add new Trailer Types in the Setup screen (see: Adding and Deleting Trailer Types)

You can add new Status's in the Setup screen (see: Adding and Deleting Vehicle and Trailer Status's)

Creating and Editing Employees

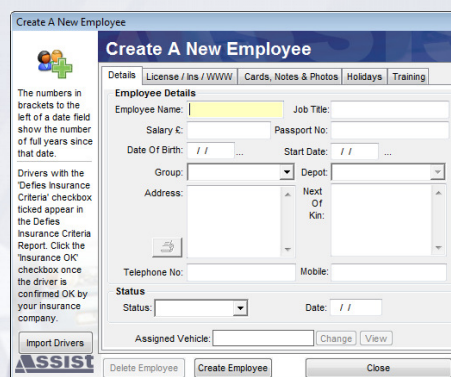
Creating a New Employee

Click the Employee toolbar button on the main window and then select the **'Create New Employee'** menu item to show the **'Create a new employee'** window.

Employee Details Tab

Simply fill in all the details for the new employee then click the **'Add Employee'** button to add the new employee.

When you type in the employees date of birth, the age of the employee is calculated and shown to the right of the 'Date of Birth' text box. The number of years the employee has held their license is calculated and shown to the right of the **'Obtained'** text box.



The screenshot shows the 'Create A New Employee' window with the 'Employee Details' tab selected. The form includes fields for Employee Name, Job Title, Salary £, Passport No., Date Of Birth, Group, Depot, Address, Next Of Kin, Telephone No., Mobile, Status, and Date. There are also buttons for 'Import Drivers', 'Delete Employee', 'Create Employee', and 'Close'. A sidebar on the left contains instructions about date fields and insurance criteria.

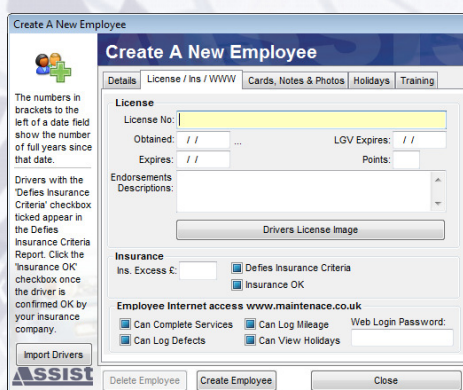
License / Ins / www. Tab

Click the **License / Ins / www.** tab to view the details regarding insurance, driving licenses and Mainten-Ace Mobile access for this employee. Fill in the self explanatory text boxes.

The **'Defies Insurance Criteria'** check box should be ticked if this employee is exceeding any requirement for your insurance company, for example if the driver is younger than 25 and your insurance policy covers employees over 25, or if the driver has 9 points and your insurance policy will only insure employees with 6 points or less.

You can later view or print off a list of drivers who defy insurance criteria for your reference so you can contact your insurance company and clear it with them that it is ok to allow this driver to drive on your fleet insurance.

Once you have cleared the driver with the insurance company you should then click the Insurance OK check box on this screen in the **'Licenses and Insurance'** section. This will prevent the driver from appearing on the **'Drivers Defying Insurance Criteria'** report.





The screenshot shows the 'Create A New Employee' window with the 'License / Ins / WWW' tab selected. The form includes fields for License No., Obtained, LGV Expires, Expires, Points, Endorsements, and Descriptions. There is a 'Drivers License Image' button. The 'Insurance' section has checkboxes for 'Ins. Excess £', 'Defies Insurance Criteria', and 'Insurance OK'. The 'Employee Internet access' section has checkboxes for 'Can Complete Services', 'Can Log Mileage', 'Can Log Defects', 'Can View Holidays', and 'Web Login Password:'. There are also buttons for 'Import Drivers', 'Delete Employee', 'Create Employee', and 'Close'. A sidebar on the left contains instructions about date fields and insurance criteria.

Employee Driving License Images

Mainten-Ace allows you to store an image of a drivers driving license for your records. You must first obtain a digital copy of the drivers license using a scanner or digital camera.

To add a Drivers License Image to the drivers details, click the 'Drivers License Image' button to open the 'Driving License Image' screen, NB in our example here, this Mainten-Ace account has not subscribed to the Drivers License Upload Feature. You can add an image of a drivers license to a driver's details from the 'Driving License Image' screen in two ways.

Add from a file: If you have already stored the photo of the driver in a file on your computer you can click the  button and then select the file from its location.

Add from the clipboard: You can copy the image to the clipboard using a graphics program (typically by selecting Edit... Copy in your graphics program) and then click on the  button on the 'Create a New Driver' screen in Mainten-Ace.

You can copy the photo from Mainten-Ace to the Windows Clipboard by clicking the RIGHT mouse button on the photo and then clicking the 'Copy Photo to Clipboard' menu item from the popup menu that appears. You can then use the Paste option in your graphics program (or MS word or any program that handles graphics) to grab the photo from the clipboard.

You can view the photo in a separate sizeable window by clicking the RIGHT mouse button on the photo and then clicking the 'View Photo In Separate Window' menu item from the popup menu that appears.

The Photo originally maximizes itself to the width of the '**Driver Photo**' window. If you want to see a larger version click on the photo image to open the '**Photo Viewer**' window. This window can be resized. You can view the photo at it's original dimensions by clicking it or maximize it to the whole window by clicking it again.

Mainten-Ace Mobile, employee internet access setup

If you are using the XML version of Mainten-Ace and your account is Mainten-Ace Mobile Internet Access enabled, you will see the check boxes and password text box in the bottom from of the window as in this example.

In order to allow an employee to access any Mainten-Ace Mobil features you must:

- 1) Tick the features that you want the employee to have access to using Mainten-Ace Mobile.
- 2) Give the employee a password (Passwords are not mandatory but strongly recommended)
- 3) Subscribe to Mainten-Ace Mobile on your Mainten-Ace account

Allowing employees to log their own mileage using Mainten-Ace Mobile

In order to allow an employee to log their own mileage using Mainten-Ace Mobile, you must assign the employee to a vehicle (see Assigning Drivers To Vehicles below). Employees can only log mileage on the one vehicle they are currently assigned to!

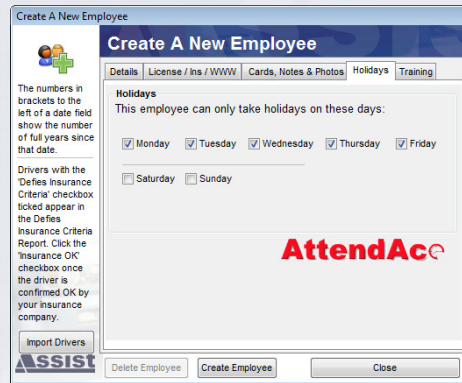
The user will then be able to log in to Mainten-Ace mobile using www.MaintenAce.co.uk/mobile web site and perform the tasks you have enabled on their employee details screen.

The AttendAce Holidays Tab

If you have subscribed to AttendAce on your Mainten-Ace account, the '**Holidays**' tab will be visible.

From this tab you can tell Mainten-Ace which days to allow an employee to be logged off on holiday in the integrated AttendAce software.

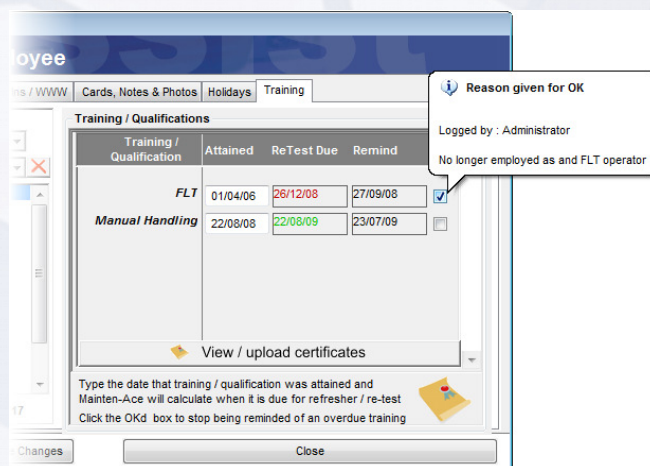
In the example here, if we try to log this employee on holiday on a Saturday or Sunday, Mainten-Ace will inform us that this employee can not use holidays on these days and prevent us from logging them.



NB other global AttendAce settings can be made in the Setup screen. These settings are contained in the Employee screen because they are employee specific.

The Training Tab

If you have subscribed to the Mainten-Ace training module, you will see the 'Training' tab in the Employee screen.



From the Training tab we can log this employees training records for all the training and certification that this employee has undertaken and attained.

In order to log an employees training records we must first create the 'Employee Training Types' in the 'Setup screen'. In our example here, we have previously created two training types of 'FLT' and 'Manual Handling' in the setup screen. Therefore, we have 'FLT' and

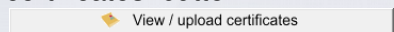
'Manual Handling' in our Training tab.

Here, our FLT training is overdue for this employee (overdue training is shown in red). Ordinarily this would be flagged on the main screen as an overdue training item but Mainten-Ace allows us to switch this off for each individual training item for each employee.

Here, we have switched off (or OK'd) this obsolete training by clicking the OK'd check box on the FLT training item. Mainten-Ace will ask you to provide a reason for switching off the warning for the overdue training when you click the OK'd checkbox. To see the reason given, you can hover your mouse over the checkbox as in our example here. Mainten-Ace is telling us that the Administrator user set the FLT item as OK'd because this employee is no longer a Forklift Truck operator. The ReTest Due text will appear green if the training is due within the reminder period that you set in the Setup screen when creating. In our example here, this employee is due for a Manual Handling refresher course within the next 30 days because we set the reminder period to 30 days when creating this training type.

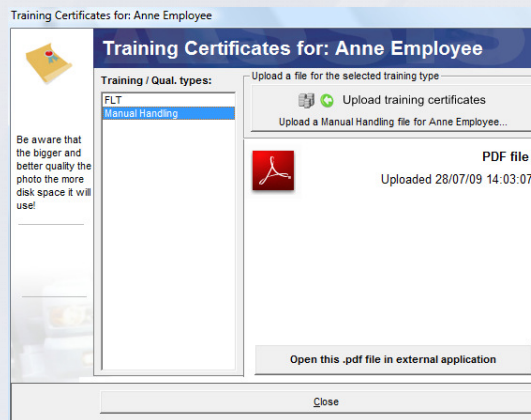
Uploading and viewing Employee Training Certificates

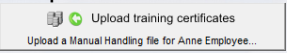
To upload or view a previously uploaded training certificate, click the 'View / upload certificates' button



This will open the 'Training Certificates' screen, displaying the list of available training types that can be logged on this account.

To Upload a certificate, select the type of training you would like to upload a certificate for from the 'Training / Qual. Types' list and then click the 'Upload



training certificates' button . Then, when the 'Open' dialog appears, simply browse your computer to find the file that contains a digital representation of the certificate. Files can be in any format that your PC and other PCs that are using Mainten-Ace can understand. In our example here we have previously uploaded a certificate for manual Handling in PDF format.

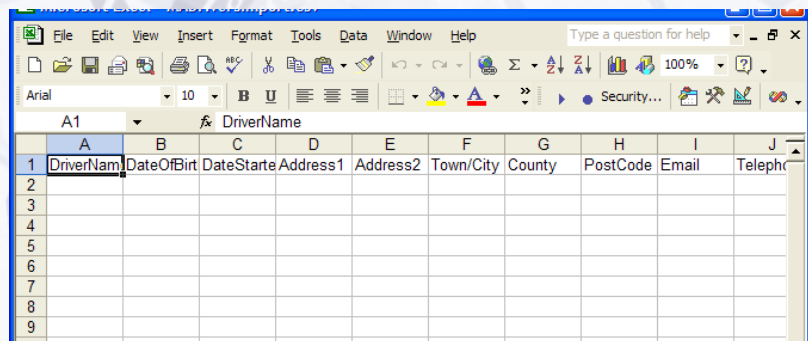
To view a previously uploaded certificate, click the 'Open this .pdf file in external application'. Mainten-Ace will open up the program that your computer uses to view that type of file and show the certificate.

If you upload the file as an image, Mainten-Ace will display part of the image on the screen. To open the full image, click the 'Open this .jpg file in external application'

Importing Employees From Your Existing System

Mainten-Ace now allows you to import Employees from your existing system.

In the Mainten-Ace folder on your PC, you will find three .CSV files. To Import employees into Mainten-Ace, you will need the **MAEmployeesImport.CSV** file. Simply open this file using your favourite spreadsheet



application and then paste your employee details into the corresponding columns in the CSV file. Be sure to save the file as a CSV file when you save it. If you save it as any other format, this will cause errors and the employees will not be imported.

To import, the employees from the CSV file, open the 'Create / Edit A Employee Screen' and click the 'Import Employees' button at the bottom left of the screen. You will then be asked to locate the **MAEmployeesImport.CSV** file that contains all your employees. If the file is in the default Mainten-Ace folder you should be able to see it straight away, otherwise, you may need to browse to the correct folder. Click the 'Open' button to open the CSV file and import it's contents to Mainten-Ace.

If all the employee details to import are ok you will be informed that the import process was successful. If there are any import errors with any of the employees in the CSV file, you will be informed of the employee that is causing the error and no employees will be imported.

Editing an Employees Details

Click the Employee toolbar button on the main window and then select the 'Edit an Employee' menu item to open the 'Edit an Employee' screen.

To edit an employee, first select them from the '**Employee Name**' pull down box. The edit employee screen is otherwise identical to the '**Create a New Employee screen**'. Make the changes to the employee details and then click the '**Save Changes**' button.

To delete an employee, select them from the '**Employee name**' pull down box and click the '**Delete Employee**' button.

Assigning Drivers To Vehicles

Mainten-Ace allows you to assign a driver to a vehicle to make your work a little easier. This makes life easier if you are using Transport Ace, as the vehicle is automatically selected for you when you selected a vehicle from the main screen. This also allows you to find contact information much quicker using Mainten-Ace. Say for example you need to contact the driver in vehicle XYZ, you simply find the vehicle in the '**Edit A Vehicle**' screen, click the '**View**' button and Mainten-Ace will open the '**Edit A Driver**' screen, showing the driver who is currently assigned to vehicle XYZ where you can see the drivers mobile number! Of course Mainten-Ace also allows you to specify a mobile number for the Vehicle if you have fixed car phones in the vehicles, but this is just one application for this feature.

You can assign a driver to a vehicle or vice versa by three methods. All three methods end up with you viewing this

'Allocate Drivers To Vehicles' screen.

Method 1: Open the 'Allocate Drivers To Vehicles' screen directly by selecting

'Allocate Drivers to Vehicles' from the '**Maintenance**' menu.

Method 2: Open the '**Edit A Vehicle**' screen, select a vehicle and click the 'Change' button.

Method 3: Open the '**Edit A Driver**' screen, select a driver and click the '**Change**' button.

Using one of these routes you should now see the '**Allocate Drivers To Vehicles**' screen.

To assign a driver to a vehicle, select a driver from the **Drivers list** by clicking the left button on the drive, then select the vehicle from the **Vehicle list**. Now the assign button (the long vertical button between the two lists containing <>)

Driver Name	Vehicle Registration
GORDON SMITH	R6 XXX
JOHN SMITH	DX51 XXX
JOHN JOHNSON	NG03 XXX
MIKE SMITH	NC03 XXX
NEIL SMITH	NC03 XXX
PETER SMITH	KN03 XXX
ROGER SMITH	A3 XXX
TERENCE SMITH	FJ03 XXX

Drivers	Vehicles
ADRIAN SMITH	A V3H1CLE
DENIS SMITH	DA02 XXX
HARVEY SMITH	P54Z XXX
KEVIN SMITH	P639 XXX
NIGEL SMITH	P709 XXX
PETER SMITH	P864 XXX
SHAUN SMITH	R529 XXX
STUART SMITH	R672 XXX
TREVOR SMITH	R761 XXX
	S226 XXX
	S474 XXX
	S682 XXX

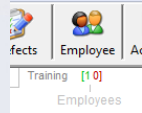
will be enabled. Click on the <> button to assign the driver to the vehicle. The driver and vehicle will disappear from the lists and reappear in the **Allocated Drivers and Vehicles** grid.

Un-allocating previously paired vehicles and drivers

To un-allocate a driver from a vehicle, select it in the **Allocated Drivers and Vehicles** grid and click the Un-allocate button.

Viewing Employee Training / Qualifications Due for Renewal

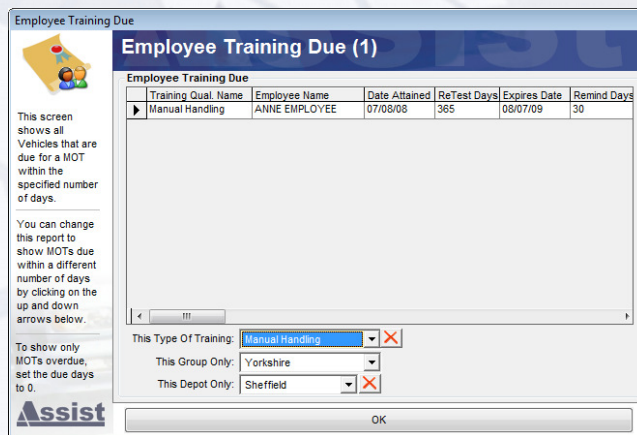
To view a list of employee training / qualifications due for renewal you can either click the Employees toolbar on the 'Employee Training Due' menu



Once the Employee Training Due screen is open we are shown all training due for the selected group or depot.

We can reduce the list further by selecting a training type from the 'This Type Of Training:' pull down if we are only concerned with a certain type of training due.

In our example here, we are looking at all 'Manual Handling' training due in the next 30 days (this is specified by that type of training and can be seen in the 'Remind Days' column in the grid). We can see that there is just one employee due for retraining of Manual Handling in the next 30 days.



Generating the Employee Training Matrix Excel® spreadsheet

Mainten-Ace allows you to produce a fully formatted Excel spreadsheet of all your employees current training status. NB you must have Excel or an application capable of viewing Excel spreadsheets installed on the PC in order to generate and view the spreadsheet and you must be subscribed to the training module on your Mainten-Ace account.

To generate the Training Matrix spreadsheet, click the Employees toolbar button on the main screen and then click the 'Employee Training Matrix (Excel)' menu item from the popup menu that appears. In the file dialog that appears, browse to the folder where you would like to generate the file and type the name that you would like to give the file.

NB Mainten-Ace will open up the spreadsheet in Excel for you to view or manipulate. To save a copy of the file, use the 'Save As' menu item from the 'File' menu in Excel.

Services

Vehicles and trailers services can be scheduled and logged for all your fleet. Both maintenance screens for Vehicles and Trailers are almost identical so we will only explore the Vehicle Services screen here.

To open the **'Entity Services'** screen click the **'Services'** Toolbar item in the Vehicles section of the toolbar and then click the **'Services'** menu item.

To open the **'Trailer Services'** screen click the **'Services'** Toolbar item in the Trailers section of the toolbar and then click the **'Services'** menu item.

The 'Entities' list on the left shows a list of all entities on the Mainten-Ace system. However, you can restrict this list to only show entities of with Status Type of 'Current' by clicking the **'Show Current Only'** checkbox so if you set entities to status such as 'scrapped' or 'sold' they will not be displayed.

The top left of the screen displays icons to represent the type of entity that is currently selected and the type of servicing scheduled that entity uses. Here in our example, we can see that we are looking at a HGV (HGV icon) that is serviced by date (calendar icon).

The screenshot shows the 'Service details for : R761 XXX (Current)' window. On the left, there is a list of entities with a 'Show Current Only' checkbox checked. The selected entity is R761 XXX (Current). The main area displays a table of scheduled services for the selected vehicle. The table has columns for Scheduled, Actual, Mileage, ServicerName, and Status. The services listed are as follows:

Scheduled	Actual	Mileage	ServicerName	Status
22/12/08				Pending
27/10/08				Pending
01/09/08				Pending
07/07/08	08/07/08	358402	A Servicing Co	Complete
12/05/08	28/05/08	343666	A Servicing Co	Complete
17/03/08	14/03/08	320195	A Servicing Co	Complete
27/02/08	27/02/08	306070	A Servicing Co	Complete
21/01/08	01/02/08	316171	A Servicing Co	Complete
19/10/07	26/11/07	286215	A Servicing Co	Complete
19/09/07	24/10/07	275562	A Servicing Co	Complete
05/09/07	11/10/07	269989	A Servicing Co	Complete
29/08/07	08/10/07	269989	A Servicing Co	Complete
04/07/07	06/08/07	246846	A Servicing Co	Complete
09/05/07	29/06/07	236685	A Servicing Co	Complete
14/03/07	21/04/07	208191	A Servicing Co	Complete
24/01/07	01/03/07	188813	A Servicing Co	Complete
17/01/07	19/02/07	188304	A Servicing Co	Complete
09/12/08	10/01/07	183545	A Servicing Co	Complete

Click on a vehicle in the list to select the vehicle and display all logged services in the services grid in the center of the window.

When viewing the list of scheduled services based on mileage, the Scheduled mileage is also displayed in the service grid and when viewing an entity scheduled by hours used the grid displays 'hours used' and 'actual hours'.

Adding services

To add a service, select a entity from the **'Entity'** list, then click the **'Add Service >>'** button and the **Add Service(s)** section will appear at the bottom of the window.

Adding Services for entities serviced by date:

Mainten-Ace allows you to either create one single service schedule or a series of services for the whole year, starting at the WC Date you type with intervals of x weeks, where x is the number you typed in the week intervals text box.

To create one service only, select the One Off option button and type the date you would like to create a service schedule for then click the Create Now Button.

To create a series of services, select the For Year option button, type the first date and the number of weeks between each scheduled service and click the Create Now button.

The screenshot shows the 'Add Service(s) for : R672 OWT (Current)' dialog box. It has two radio buttons: 'One Off' (selected) and 'For Year'. There is a 'Week intervals' field with the value '6'. Below that is a 'WC Date' field with a date picker. At the bottom right, there are 'Create Now' and 'Cancel' buttons.

Nb the date you type must be the same day as that you have chosen as the Service week commencing day in the Services section of Setup

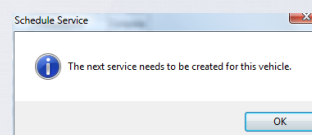
Adding Services for entities serviced by mileage:

Create the next service for this vehicle
09/09/09 Current vehicle service mileage : 359842
Due In : 15000 miles Due: Create Now
Scheduled Date: 09/09/09 or Due At : 374842 mileage

Mainten-Ace allows you to schedule mileage based services *relative* or *absolute* i.e. either click the 'Due In:' option button if you know that the

service is due in x miles relative to the mileage logged or click the 'Due At:' option button if you know the absolute mileage at which the next service is due.

Unlike services due by date, you can not pre-schedule multiple services when scheduling by mileage. Instead, Mainten-Ace automatically prompts you to create a new service for an entity once you complete a service.



On the main screen, Mainten-Ace will warn you when a mileage based service is imminent based on the most recent mileage logged.

Logging Vehicle Mileages:

There are two ways to log a mileage for a vehicle in Mainten-Ace and also you employees can log their own mileage using Mainten-Ace Mobile if you have subscribed to it on your Mainten-Ace account.

To open to 'Log Vehicle Mileages' screen click the 'Entity' toolbar button on the main screen and then select the 'Log Vehicle Mileages' menu item from the popup menu that appears. You can also servicing screen, click the 'Log a Mileage' button.

This screen will show a list of all vehicles that are serviced by mileage only. In our example we are showing all vehicles serviced by mileage in the Sheffield depot of the Yorkshire group. We only have one vehicle in this depot in our example.

In our example we are about to input mileages logged on 29/07/09 (see the date picker at the top right of the screen). To change the date you want to log for, either click the '<' and '>' buttons to move back or forward one day or click the 29/07/09 date picker and select a different date from the calendar.

If you move to a previous date that you have logged mileages for, Mainten-Ace will display the mileages against the vehicles in the Mileage column, where you can overwrite them mileage to amend it.


To log a mileage, simply scroll down the list using the scroll bar on the right and then type the current mileage in the 'Mileage' text box column for that vehicle. Keep inputting the mileages for that day for all vehicles you want to log mileages for and then click the 'Save' button when you are done.

Log Vehicle Mileages
Mileages Logged For : 29/07/09
Now showing vehicle mileages input for 29/07/09
Vehicle Registration Mileage
R761 VSB
This Group Only: Yorkshire
This Depot Only: Sheffield
Save Close

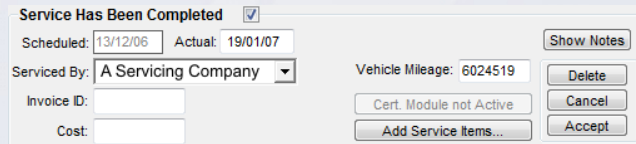
Adding Services for entities serviced by hours used:

Mainten-Ace allows you to schedule the service either *relative* or *absolute* i.e. either click the 'Due In:' option button if you know that the service is due in x miles relative to the mileage logged or click the 'Due At:' option button if you know the absolute mileage at which

Completing a service

To complete a scheduled service, select the vehicle from the '**Vehicle List**' and then select the service you want to complete from the services grid by clicking the service selector (). The '**complete**' section will appear at the bottom of the window.

Click the '**complete**' check box, type the actual date that the service was undertaken and the milage of the vehicle. Select the fitter or organisations that serviced the vehicle from the Serviced By pull-down list box.



If any defects were rectified during the service without a Defect being raised, you can type the details in the Defects Repaired text box. If you need to tie up a service to an Invoice, type the invoice number in the 'Invoice ID' box.


Mainten-Ace now allows you to store a full break-down of each service cost to the complexity that you determine. If you do not need to break-down the service cost at all, you can simply type the cost of the service in the '**Cost**' text box here. If you do want to have a broken-down service cost you must first create the service item categories in the setup screen (see Creating Service Item Categories)

If the fitter or service company is not already in the list you can add new fitters and service companies in Setup (see: Adding and Deleting Fitters and Service companies)

When completing a service scheduled by mileage, the 'scheduled mileage' is also shown. When completing a service scheduled by hours used, the 'scheduled hours' and 'actual hours' is shown.

You can add notes to the service by clicking the 'Show Notes' button to display the notes text box. Click the 'Hide Notes' button to return to the original view.

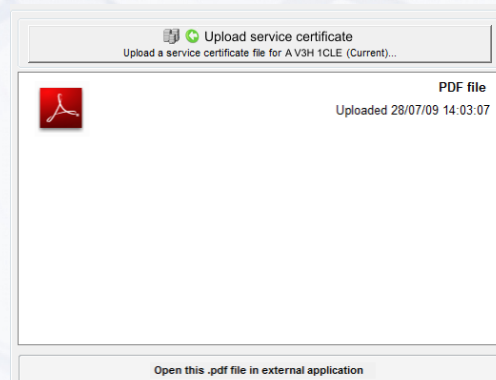
Deleting a scheduled service

To Delete a service click the service selector () for the service you want to delete then click the 'Delete' button.

Uploading an Entities Service Certificate

If you have subscribed to the vehicle service certificate upload feature on your Mainten-Ace account you will be able to click the 'Certificate...' button when completing a service details.

You will then see the frame shown to the right where you can click the 'Upload service certificate' button and then browse to the digital file representation of the certificate.



To view a previously uploaded certificate

click the 'Open this .pdf file in external application' button. Mainten-Ace will open the application on you PC that is capable of viewing that type of file and then show the file.

Providing A Service Cost Break-down

To begin entering the cost values of a vehicles service, see the above section on completing a service, then click the 'Add Service Items...' button to display the Service Items section.

In the screen shot to the right, you can see that this company has chosen to store a fairly comprehensive breakdown of their servicing.

Even though there is a full breakdown, these values are optional.

Simply type the cost of the service item and the warranty period for the service item in the relevant text boxes and then click the 'Save Service Item Values' button to save these values against the service.

NB If you provided a default warranty days value when you created the service item category in the 'Setup' screen, this value will automatically be placed in the warranty text box for you against the service item type when you enter a cost value. This saves a lot of time entering warranty periods.

If a service item has no warranty or you do

not want to store the value simply leave the value of the warranty text box at zero.

If you include the warranty day values when you input your service costs, the next time you input a service item for that category, Mainten-Ace will automatically look back in its records for that vehicle and will display a message if you are adding a service item that is still under warranty.

Service Item Type	Cost	Warranty Days
Air Filter	0	0
Break Cleaner	0	0
Break Cleaner Fluid	0	0
Clutch	0	0
Door seal	0	0
Engine Oil	0	0

Total Service Cost : 0.00

Viewing The Full Service Report

Mainten-Ace allows you to view the entire history of a vehicles service cost by clicking the 'Full Report...' button from the Vehicle Service screen.

Service Item Names	22/01/06	26/02/06	02/04/06	07/05/06	11/06/06	16/07/06	20/08/06	24/08/06
Service Item Names								
Invoice:	John Gibs	John Gibs	T. Swinbo	Jamie Tea				
Mileage:	101232	102421	104911	107518				
Air Filter	12.99	12.99	12.99	12.99				
Break Cleaner	2.00	2.00	2.00	2.00				
Break Cleaner Fluid								
Clutch			141.28					
Door seal		24.59						
Engine Oil	24.99							
Front Break Pads								
Front Pads and Disl		148.50						
Fuel Filter	12.98							
Headlight bulb			4.68					
Number Plate Bulb	0.27							
Oil Filter								

From here you can see the entire history of the selected vehicle by service and the total cost is summed at the bottom of the grid. The grid is read-only, you can only view the data that has been previously input in the 'Service Cost Break-down' section and the

'Complete Service' section.

Mainten-Ace can export this data into a CSV file if you would like to import it into your favourite CSV file or if you need to email it to someone.

To export the entire vehicles service history, click the **'Export CSV'** button and then select the folder where you want to save the file and type the name that you would like to give the file in the **'File Name'** text box, then click the **'Save'** button.



Viewing Vehicles / Trailers Due for Service by date

To view a list of all vehicle services now due in the next x days, click the Services toolbar button in the Vehicles section of the toolbar and then select the **'View Entity Service Due By Date'** menu item from the menu.

To view a list of all services now overdue for Trailers, click the Services toolbar button in the Trailers section of the toolbar then select the **'View overdue Vehicle Services'** menu item from the menu.

The **'Vehicle / Trailers Services Due'** window shows all services due within a specified number of days.

Vehicle Services Due

Services Due In 14 days (0)

Services Due

Vehicle Registration	Status	Scheduled
----------------------	--------	-----------

This screen shows all Vehicles that are due for a Service within the specified number of days.

You can change this report to show Services due in a different number of days by clicking on the up and down arrows below.

Due in the next: 14 Days

To show only overdue services, set the due days to 0.

This Group Only: Yorkshire

This Depot Only: Sheffield

Assist

OK

You can change the number of days by clicking on the up and down arrow buttons.

You can double click on a selector to display the service screen for that particular service.

To close the window, click the 'OK' button.

Viewing Entities Due for Service by mileage

Vehicle Services Due by Mileage

Services Due In 1000 miles (0)

Services Due

VehicleRegistration	Status	Due In Miles
---------------------	--------	--------------

This screen shows all Vehicles that are due for a Service within the specified number of days.

You can change this report to show Services due in a different number of days by clicking on the up and down arrows below.

Due in 1000 Miles or less

To show only overdue services, set the due days to 0.

This Group Only: Yorkshire

This Depot Only: Sheffield

Assist

OK

To view a list of all entities due for service in the next x miles, click the Services toolbar button in the Vehicles section of the toolbar and then select the **'View Entity Service Due By Mileage'** menu item from the menu.

You can change the number of miles by clicking on the up and down arrow buttons.

You can double click on a selector to display the service screen for that particular service.

To close the window, click the 'OK' button.

Viewing Entities Due for Service by hours usage

To view a list of all entities due for service in the next x miles, click the Services toolbar button in the Vehicles section of the toolbar and then select the **'View Entity Service Due By Mileage'** menu item from the menu.

You can change the number of miles by clicking on the up and down arrow buttons.

Entities Due for Service by Hours Used

Services Due In 100 hours (0)

Service Due By Hours Used

Entity Name	Scheduled Hours	Due In Miles
-------------	-----------------	--------------

This screen shows all Entities that are due a service within the specified number of days.

You can change this report to show Services due within a different number of days by clicking on the up and down arrows below.

Due in the next: 100 Hours

To show only Services overdue, set the due days to 0.

This Group Only: Yorkshire

This Depot Only: Sheffield

Assist

OK

You can double click on a selector to display the service screen for that particular service.

To close the window, click the 'OK' button.

Viewing VED, Insurance and MOT due

- To view a list of all vehicles with VED due, click the 'VED' toolbar button
- To view a list of all vehicles with Insurance due, click the 'Insurance' toolbar button
- To view a list of all vehicles with MOT due click the 'MOT toolbar button
- To view a list of all vehicle tachograph calibrations due, select the 'Calibrations Due' menu item from the popup menu after clicking the Tachos toolbar button.
- To view a list of all vehicle tachograph Checks due, select the 'Checks Due' menu item from the popup menu after clicking the Tachos toolbar button.

The window that appears looks similar to the '**Vehicle / Trailer Services Due**' window (as above) shows all VED/Insurance/MOT/Tacho Cals/Tacho Checks due within a specified number of days.

You can change the number of days by clicking on the up and down arrow buttons.

You may print a copy of the list of due vehicles or Trailers by clicking on the print button.

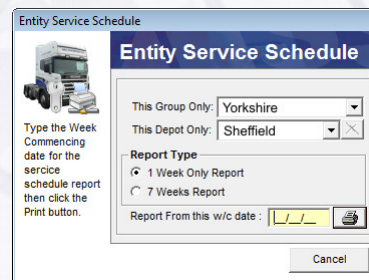
To close the window click the 'OK' button

Printing a Vehicle or Trailer service schedule

To print a Vehicle Service Schedule, click the vehicle 'Services' toolbar button on the main window and then select the 'Print Vehicle Service Schedule' menu item.

To print a Trailer Service Schedule, click the trailer 'Services' toolbar button on the main window and then select the 'Print Trailer Service Schedule' menu item.

Mainten-Ace has the ability to print a schedule of all vehicles or services due to be services on a specified date. The Vehicle and Trailer Service Schedule screens are identical except for the Entity screen allows you to specify the



Simply type the week commencing date that you would like to view the report for and click the Print button. The week commencing date that you type must be the day that you have chosen as the Service week commencing day within the Setup screen.

There are two options, 1 Week and 7 Weeks that either print a single weeks service schedule or 7 weeks on one page respectively

Defects and Service Items

Mainten-Ace allows you to log defects that your drivers have reported to you and then produce reports to discover recurring defects

Logging a Defect or Service Item

The defect screens for Vehicles and Trailers are almost identical except that defects for Vehicles also take into account the mileage for the vehicle at the time of the defect. As such we will only explore logging a vehicle defect here.

To log a Vehicle defect, click the **'Defects'** button on the toolbar in and the Drivers section of the toolbar, then select the **'Log a Vehicle Defect'** menu item. To log a Trailer defect, click the **'Defects'** button on the toolbar in and the Trailers section of the toolbar, then select the **'Log a Vehicle Defect'** menu item.

Mainten-Ace allows you to add either a Defect or a Service Item in this screen. This is so that you can create reports that show the entire monetary history of a vehicle. To log a Defect, ensure that the **'Defect'** option button is selected in the **'Type'** section. To log as a service item, ensure that the **'Service Item'** option button is selected.

Select the vehicle you want to log a defect for from the **'Vehicle'** pull down and then click the **'Add Defect'** button.

You must type the **'Date Logged'**, **'Defect No'** and **'Defect Description'**. At this point the **'Date Rectified'** and **'Rectified By'** fields are optional.

You can choose an existing fitter or service company from the **'Rectified By'** pull down. If the fitter or service company is not already in the list, click the **'+**' button to the right of the pull down and type in the name of the fitter in the Input Box that appears. The name will then appear in the list for you to choose. To delete an existing fitter or servicing company simply click on the **'x'** button. NB you can only delete a fitter or servicing company if it has not yet been assigned to a Service or Defect.


Viewing Defects, Printing Defect Reports and Completing Defects

To open the Vehicle Defects screen, click the **'Defects'** button from the toolbar on the main screen then select the **'View Vehicle Defects'** menu item.

Viewing Defects

To view a list of defects matching your criteria, simply make your selections and click the Find Now Button.

The **'Show'** criteria...

To show defects for all vehicles, leave the **'All'** option button selected. To show defects for only one vehicle, select the **'Selected Vehicle Only'** button and then click on the arrow selector () from the Vehicles list.

The 'Rectified' criteria...

Here you can also specify whether to include All, Rectified or Pending defects.

The 'When' criteria...

To show defects logged any time leave the 'Any Time' option button selected.

To only include defects logged after a certain date click on the 'Specify Dates' option button and then type the date to include from in the 'From' text box.

To only include defects logged before a certain date click on the '**Specify Dates**' option button and then type the date to include from in the 'From' text box.

To only include defects logged between two dates click on the '**Specify Dates**' option button and then type the dates in both the '**From**' and '**To**' text boxes.

Vehicle Reg	Manufacturer	Mileage	Date Logged
A V3H1CLE	MAN	425128	04/01/07
A V3H1CLE	MAN	425128	05/01/07
A V3H1CLE	MAN	425128	06/01/07
A V3H1CLE	MAN	425128	09/01/07
A V3H1CLE	MAN	425128	09/01/07
A V3H1CLE	MAN	425128	09/01/07
A V3H1CLE	MAN	425128	09/01/07
A V3H1CLE	MAN	425128	12/01/07

The 'Containing this text' criteria


If you only want to see vehicle defects logged for a specific reason such as a '**clutch**' defect, type the words in the '**Containing this text**' text box.

To view the list of matching defects click the 'Find Now' button.

You can click on a header in the list of defects to sort the list by that column. Click it again to sort it in descending order.

In our example above, we are viewing a list of all defects logged for entity 'A V3H1CLE' between 01/01/07 and 31/07/07.

Logging a Defect as completed

After you have generated a list of defects and are viewing them in the defects list you can click on the arrow selector () from the defect list for the defect you want complete. This opens up the defect details frame and presents the details for the selected defect.

To complete the defect, type the date in the '**Date Rectified**' text box and select the fitter or servicing company from the '**Rectified By**' pull down.

If the fitter or service company is not already in the list you can add new fitters and service companies in Setup (see: Adding and Deleting Fitters and Service companies)

Defect Details for Vehicle 'A V3H1CLE'

Type: Defect Service Item

Warranty Days: 365

Date Logged: 09/01/07

Order Number: tr297042 Defect No: 123

Mileage: 425128 Authorised By: dixel

Defect Description: to fit 215/75-17.5 Iassa ls/r3000

Rectification

Date Rectified: 09/01/07 Cost £: 100.76


Rectified By: [Pull Down]

Rectification Description: [Text Area]

Buttons: Delete, Save, Close

Click the '**Save**' button to save the defect details or click '**Cancel**' to cancel.

Printing a defect report

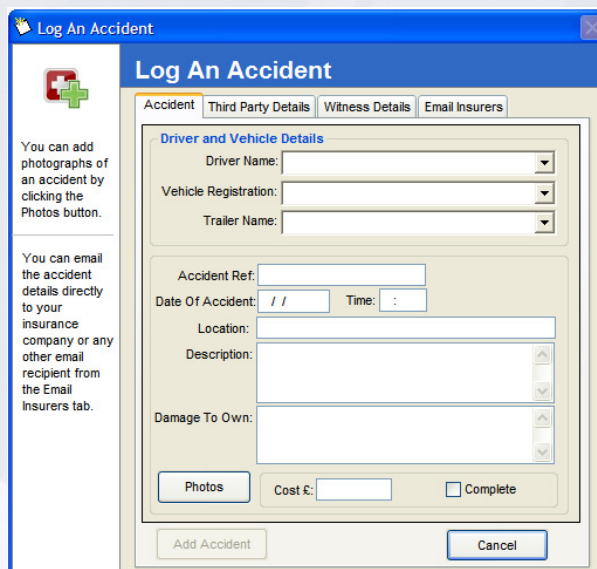
After you have generated your list of defects based on your criteria, simply click in the print button  to display the print preview of the report.

Accidents

Logging an Accident

To log an accident, click the **'Accidents'** toolbar button and then select the **'Log and Accident'** menu item.

On the **'Log and Accident'** screen you must select the driver from the **'Driver Name'** pull down box and either a Vehicle Registration or a Trailer Name or both from the respective pull downs. Then fill in all the accident details.



Third Party Details Tab

If the accident was the drivers fault leave the **'Driver'** toggle button selected, if it was a 3rd parties fault, click the **'3rd Pary'** toggle.

Witness Details Tab

Just fill in the self explanatory text boxes if there was a witness to the accident whos details were taken.

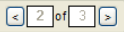
Email Insurers Tab

Click the **'Hard copy Sent to insurer'** box if you have sent a hard (paper) copy to your insurance company.


If you have set up your insurers email information in the setup screen (see: Setting up your Insurers Details for automatic emailing of accidents) you can click on one of the three buttons in the **'Insurer'** section to automatically send them an email containing the accident details.


Click the **'Add Accident'** button when you have completed all details or click the **'Cancel'** button to cancel.

Adding Photographs to an Accident

Mainten-Ace will allow you to attach photographs to an accident. To add photos, click the **'Photos'** button to display the **'Accident Photos'** screen. In the example here, we are currently viewing photo number 2 and there are 3 photos currently attached to this accident referenced ADW132. To show existing photos for the selected accident, click on the  buttons.

You can attach a photograph to an accident in two ways, either by attaching from a file or from the contents of the Windows Clipboard:

Add photo from a file: If you have already stored the photo of the driver in a file on your computer you can click the  button and then select the file from its location.

Add a photo from the clipboard: You can copy the image to the clipboard using a graphics program (typically by selecting Edit... Copy in your graphics program) and then click on the  button on the **'Create a New Driver'** screen in Mainten-Ace.



You can copy the photo from Mainten-Ace to the Windows Clipboard by clicking the RIGHT mouse button on the photo and then clicking the **'Copy Photo to Clipboard'** menu item from the popup menu that appears. You can then use the Paste option in your graphics program (or MS word or any program that handles graphics) to grab the photo from the clipboard.

You can view the photo in a separate sizeable window by clicking the RIGHT mouse button on the photo and then clicking the **'View Photo In Separate Window'** menu item from the popup menu that appears.

The Photo originally maximizes itself to the width of the **'Driver Photo'** window. If you want to see a larger version click on the photo image to open the **'Photo Viewer'** window. This window can be resized. You can view the photo at it's original dimensions by clicking it or maximize it to the whole window by clicking it again.

Delete a Photo

Click on the Delete button to delete the currently shown photo.

Viewing Accidents, Printing Accident Reports and Completing Accidents

To open the **'Accidents'** screen, click the **'Accidents'** button from the toolbar on the main screen then select the **'View Accident'** menu item.

Viewing Accidents

To view a list of Accidents matching your criteria, simply make your selections and click the Find Now Button.

The 'Show Drivers' criteria...

To show Accidents for all Drivers, leave the 'All' option button selected. To show accidents for only one Driver, select the 'Selected Driver Only' button and then select the Driver from the pull down.

The 'Show Vehicles' criteria...

To show Accidents for all Vehicles, leave the 'All' option button selected. To show accidents for only one Vehicle, select the 'Selected Vehicle Only' button and then select the Vehicle from the pull down.

The 'Show Trailers' criteria...

To show Accidents for all Trailers, leave the 'All' option button selected. To show accidents for only one Trailer, select the 'Selected Trailer Only' button and then select the Trailer from the pull down.

The 'Rectified' criteria...

Here you can also specify whether to include All, Rectified or Pending accidents.

The 'This Location' criteria

If you only want to see vehicle accidents that occurred in a certain place, type the name of the place for example 'dartford tunnel' or 'Hatfield' in the 'Containing this text' text box.

The 'When' criteria...


To show accidents logged any time leave the 'Any Time' option button selected. To only include accidents logged after a certain date click on the 'Specify Dates' option button and then type the date to include from in the 'From' text box. To only include accidents logged before a certain date click on the 'Specify Dates' option button and then type the date to include from in the 'From' text box. To only include accidents logged between two dates click on the 'Specify Dates' option button and then type the dates in both the 'From' and 'To' text boxes.

To view the list of matching accidents click the 'Find Now' button.

You can click on a header in the list of accidents to sort the list by that column. Click it again to sort it in descending order.

The screenshot shows a software window titled 'Accidents'. The window contains several search criteria sections on the left side, each with radio buttons and a dropdown menu. The 'Show Drivers' section has 'All' selected. The 'Show Vehicles' section has 'All' selected. The 'Show Trailers' section has 'All' selected. The 'Whos Fault' section has 'All' selected. The 'Rectified' section has 'All' selected. The 'This Location' section has an empty text box. The 'When' section has 'Any Time' selected. Below these sections are two buttons: 'Find Now >>>' and 'Find This Ref:'. To the right of the search criteria is a large text box with a red cross icon and the following text: 'To display a list of matching Accidents, select the criteria for your search from the left and then click the 'Find Now >>>' button.' Below this text box is another button: 'Find Ref >>>' and a 'Close' button.

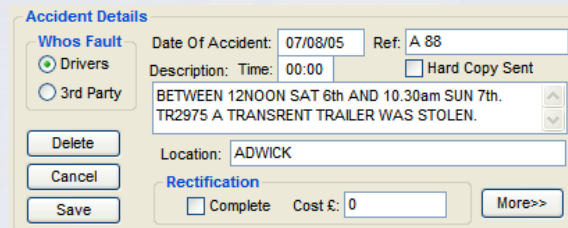
Logging an Accident as completed

After you have generated a list of accidents and are viewing them in the accidents list you can click on the arrow selector () from the defect list for the defect you want complete. This opens up the accident details frame and presents the details for the selected Accident.

To complete the Accident, click the 'Complete' check box and type the cost for rectifying the damage.

You can see a limited view of the accident here. If you want to see the full details of the accident, click the '**More>>**' button.

Click the '**Save**' button to save the defect details or click '**Cancel**' to cancel.



Accident Details

Whos Fault

Drivers

3rd Party

Date Of Accident: 07/08/05 Ref: A 88

Description: Time: 00:00 Hard Copy Sent

BETWEEN 12NOON SAT 6th AND 10.30am SUN 7th.
TR2975 A TRANSRENT TRAILER WAS STOLEN.

Location: ADWICK


Rectification

Complete Cost £: 0

Deleteing an Accident

To delete the accident click the 'Delete' button.

Printing a defect report

After you have generated your list of accidents based on your criteria, simply click in the print button  to display the print preview of the report.

The Integrated AttendAce Employee Holiday Scheduler

If you subscribe to the AttendAce bolt-on, on your Mainten-Ace account, you will have access to the integrated AttendAce Employee Holiday Scheduler. The holiday scheduler is also sold as a stand-alone system but for your convenience can be purchased as an Add-In for Mainten-Ace. Please contact Assist IT Solutions Ltd if you would like to unlock this feature.

The integrated AttendAce system can be run by selecting 'Start AttendAce' from the 'AttendAce' menu.

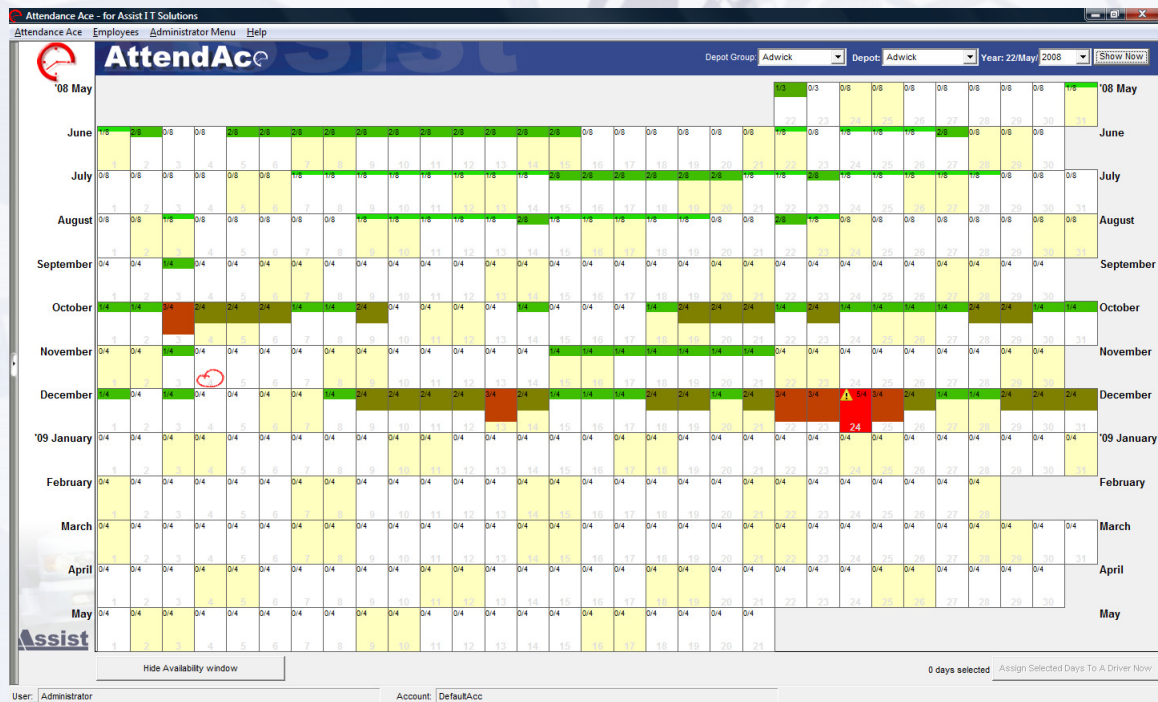
The holidays scheduler screen shows at a glance the entire year overview of the availability of your employees.

The screen layout shows every day of every month for the currently selected year and depot.

You can see here that this company's year starts on the 22nd of May. This can be set in the 'Setup' screen by an administrator user.

We are currently viewing Adwick depots employee availability for 2008, may 22nd to May 21st 2009. If you have multiple depots, you can view the availability for other depots by selecting a different depot from the 'Depot' pull down at the top right of the scheduler screen and click the 'Show Now' button.... The 'Depot' pull down in our example is disabled because the user account has been restricted to only be able to view the Adwick depot.

To show a different years availability, select the year from the 'Year' pull down and click the 'Show Now' button.



If you only have one depot, Mainten-Ace will automatically select it for you and show the availability calendar for that depot when you open the scheduler. If you have more than one depot, you will need to select the depot from the pull down and click the 'Show Now' button before the calendar is displayed.

Each Cell or box represents a day of the year. Today's date is ringed for you for quick reference. In our example today's date is the 4th November



The months of the year are shown to the far left and far right of the months days. At the top of the days Cell in black text is the current utilisation of the holidays for this day. In this Cell here we can see '2/5', this represents that this day has a maximum holiday allowance of 5 and there are currently 2 employees logged as unavailable for this day. The number 23 in grey text signifies that this Cell is the 23rd day of the month.

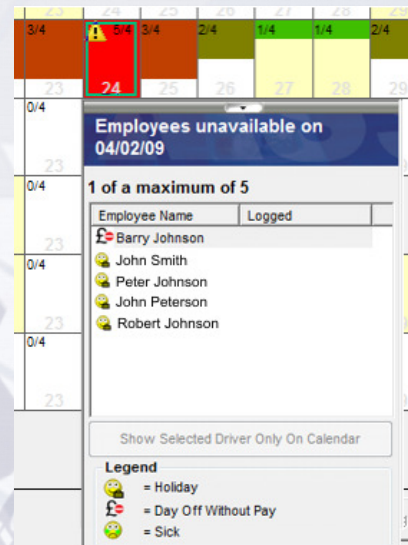


Viewing Employees Unavailable For One Specific Day

To see who is unavailable for a specific date, click the RIGHT mouse button on the date in the calendar to display the '**Employees Unavailable**' popup. This popup shows a list of employees that are logged as unavailable for the selected date in a list box.

The popup is displayed either above or below the selected date depending on the location of the date on the screen to make sure it fits on the screen correctly. The selected date will also be highlighted to avoid any confusion as per our example here.

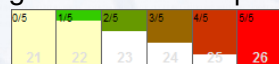
From this popup you can tell Mainten-Ace to restrict the calendar to only show only unavailability for one employee. To do this, simply select the employee in the list of unavailable employees for that date and the 'Show Selected Employee Only On Calendar' button will become enabled. Click this button and the scheduler calendar will be redrawn showing only that one employee.



NB You can restrict the calendar to any employee by using the left fly-out, please see the *Showing One Employees Availability In The Calendar* section later in this manual.

To close the popup, either click the [X] at the top of the popup or alternatively, the popup will be hidden once you select a date from the calendar or refresh the calendar. If you right click a different date, the 'Employees Unavailable' popup will be shown at a different location on the screen next to the new selected date.

The scheduler also shows the utilisation of each days holiday allowance by means of a sizing and colour coding system. When there is at least one employee logged as unavailable for a day, that day is filled with a coloured box that varies in colour from green to red to represent the proportion of allowed employees unavailable for that day.



Green means one employee is unavailable red means the maximum amount of employees are allocated as unavailable for that day. The box also fills the day as a proportion of the allowance so if a days maximum number of employees has been reached, the box will cover the entire day as can be seen on the 26th day of the month in the scale here.

The backgrounds of the Cells are white except for Saturdays and Sundays that have an off white / cream background to differentiate them from weekdays.

If you have not set the criteria for a certain date or if you have set it's maximum employees allowed off as zero, the day will be displayed with red diagonal stripes to indicate this.



If you have exceeded the maximum number of employees allowed as unavailable for a particular day, a warning icon is displayed in that date so you can see which days have more than the allowed number of employees logged as unavailable.



Logging Employees as Unavailable (holiday / sick/ off without pay)

Logging an employee as unavailable is as simple as clicking the Cells for the days you want to log unavailability and then assigning those days to an employee.

If a day has already reached its Maximum numbers of employees unavailable and a standard user click that day Mainten-Ace will display the 'Authorisation Required' popup.

A standard user can then ask a manager to authorise the unavailability for this day for the selected employee by selecting their account from the 'User Name' pull down, typing their password and then clicking the 'Authorise' button.

If a standard user needs to select multiple days that are already exceeding the maximum number of unavailable employees, the manager can check the 'Authorise for 5 seconds' check box before clicking the 'Authorise' button. This will allow the user or the manager to select the remaining days without being prompted for authorisation within 5 seconds.

Administrator users can select days that are already exceeding the maximum number of unavailable employees without the need to authorise as they are already logged in using an administrator account.

To assign the selected days to an employee, click on the '**Assign Selected Days To A Employee Now**' button to make the '**Log Availability**' popup appear.

The number of currently selected days / cells is presented to the left of the '**Assign Selected Days To A Employee Now**' button. NB the 'Assign Selected Days To A Employee Now' button only becomes enabled once at least one days cell has been selected. Mainten-Ace allows you to log employees as unavailable for three reasons, Holiday, Sick or Day off without pay. To assign the unavailability to an employee, select one of the unavailability options and then select the employee from the employees list and click the '**Assign ????? Days To This Employee Now**' button (this button changes its text depending on which option you have selected, in our example it says '**Assign Sick Days To This Employee Now**' because the Sick option has been selected).

If you selected 'Sick' or 'Day Off Without Pay', the unavailability will be assigned immediately as you have already clarified that the employee is allowed to be unavailable on that day by selecting days that have not exceeded the maximum number of employees or by having the days authorised by a manager. NB Mainten-Ace has no restrictions on the number of sick days or days off without pay that an employee can have.

If you are trying to assign holiday days, Mainten-Ace performs multiple calculations to find out if the selected employee is entitled to be on holiday on the selected days. Firstly, Mainten-Ace will lookup the start date for the selected employee and calculate the number of whole years service that this employee has undertaken

and then lookup the holiday entitlement for this length of service. Next Mainten-Ace calculates the number of holidays that the selected employee has already used in the selected year and compares that against the determined holiday entitlement for that employee. If the employee has already exceeded their holiday usage for the selected year or if the number of days you are trying to add will take the employee over their maximum holiday entitlement you will see a warning message.

If the user chooses to continue they will be required to get manager authorisation if you are logged in as a standard user. Administrator users will be able to continue to assign the holidays without requiring authorisation.

Viewing and Printing Employee Unavailability

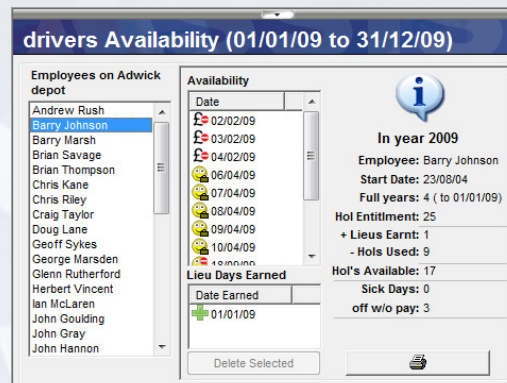
To view an employees holiday, sick day and day off without pay usage, simply click on the **'View / Change / Print Employee Availability'** button to display the **'Employee Availability'** popup.




Now select the employee you are concerned with from the **'Employees on ?????? Depot'** list.


You will now see a list of all currently assigned holidays, sick days and days off without pay in the 'Availability' list.

We can also see any Lieu Days an employee has earned in the **'Lieu Days Earned'** list.

The right hand side of the popup will now show a full breakdown of the currently selected employees availability entitlement and usage.



To print an employees unavailability, simply click the  button to display the report preview screen where you can choose to print the report by clicking the  button or export it to HTML or text by clicking the  button.


To close the 'Employee Availability' fly-out, click the  button or click the 'Hide Availability Window' button.

Deleting a Previously Assigned Holiday, Sick Day or Day Off Without Pay

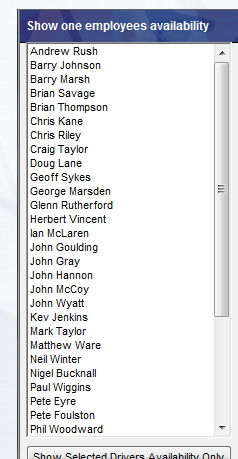
To remove a Previously Assigned Holiday, Sick Day or Day Off Without Pay select the date in the 'Availability' list and click the 'Delete Selected' button.

Click the 'Hide Availability' button to close the 'Employee Availability' popup.


Showing One Employees Availability In The Calendar

Mainten-Ace will also allow you to view one employee on the year calendar. To view only one employee, click the  button at the left of the Scheduler screen half way down the screen on the dark grey bar to open the 'Show one employees availability' fly-out.

From the fly-out, simply select the employee you are interested in and either click the 'Show Selected Employee Availability Only'







button or double click the employee in the list. The calendar will then repopulate showing only that employee.

To view all employees again, click the 'Show Now' button at the top right of the Scheduler screen. The fly-out will close automatically on choosing an employee. If you decide you do not want to show one employees availability in the calendar, simply click the  button to hide the fly-out.

When in single employee mode, the calendar will not show the colour coding system. Instead a series of icons are displayed to indicate why the employee is logged as unavailable for a specific date.

Here is the legend for unavailability whilst in single employee mode:

-  = Employee is on holiday
-  = Compulsory Holiday Day
-  = Employee is sick
-  = Employee is off without pay

In single employee calendar mode you can not log any unavailability for an employee but you can right click on a day to view a list all employees unavailable on that date. To display the calendar for all employees again, click the 'show now' button.

Setting up Holiday Restrictions

Mainten-Ace allows you to set the maximum number of employees allowed off between a certain date range. This is done through the Holiday Restrictions tab of the Setup screen.

Open the '**Setup AttendAce**' screen from **the 'Administrator'** menu (administrator users only) and select the '**Holiday Restrictions**' tab.

Holiday restrictions are set for each depot, as different depots may have different restriction.

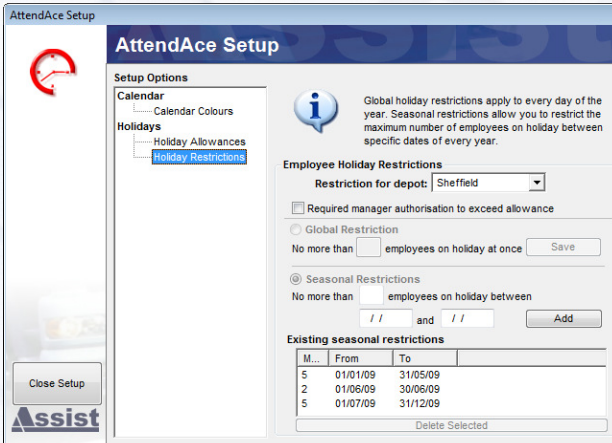
Select a depot from the '**Restriction for depot:**' pull down to amend the restrictions for that depot.

The first option for the restriction is to '**Require manager authorization to exceed allowance**'. If you tick the check box for this depot administrator users will be able to override holiday restrictions i.e. assign holidays to employees even if the maximum allowance has been met for that day, however, standard users will be prompted for authorization from an administrator user. An administrator user can then authorize 'day off' by choosing their User Name and typing their password into the Password text box to authorize for the selected date and click the '**Authorise**' button.

Mainten-Ace allows two categories of holiday to be set, these are **Global** restrictions and **Seasonal** restrictions.

A Global restriction applies to every day of every year for eternity. This type of restriction can be used with companies that have a simplistic holiday system whereby for example no more than 5 employees are allowed to be unavailable at any one time in the year.

Seasonal restrictions allow more flexibility with the restrictions you set, so if you allow more employees to



The screenshot shows the 'AttendAce Setup' window with the 'Holiday Restrictions' tab selected. It includes a 'Restriction for depot:' dropdown menu set to 'Sheffield', a checkbox for 'Required manager authorisation to exceed allowance', and radio buttons for 'Global Restriction' and 'Seasonal Restrictions'. Below these are input fields for 'No more than' employees and date ranges. A table titled 'Existing seasonal restrictions' lists dates and employee counts.

M..	From	To	
5	01/01/09	31/05/09	
2	01/06/09	30/06/09	
5	01/07/09	31/12/09	

be on holiday at certain times of year when business is less busy and less employees on holiday at Christmas for example, this can be done using the Seasonal Restrictions section.

We can see here in our example that this company has set up seasonal allowances so that no more than 5 employees can be on holiday between 1st January and 31st May and no more than 2 employees may be on holiday between 1st June and 30th June because this company have a very busy period in June so needs to ensure that it has as many employees available as possible.

If you do not set a restriction for a date range in Mainten-Ace when using Seasonal Restriction criteria Mainten-Ace will assume that that no employees are allowed to be unavailable between that date range, this is in effect the same as creating a restriction for the date range and setting the maximum number of employees allowed to be unavailable to zero. Administrator users will still be able to override this zero allowance as usual.

Global Holiday Restriction

To set Mainten-Ace to use the global restriction method, click the 'Global Restriction' option button to enable the Global Restrictions section. If you have previously created a Seasonal Restrictions, Mainten-Ace will warn you that these seasonal restrictions will be deleted in favour of the global restriction if you set a global restriction.

Simply type the maximum number of employees ever to be allowed to be unavailable in the '**No more than xx employees on holiday at once**' text box and then click the Save button to set the global restriction. NB you do not need to click the '**Apply Changes**' button on the setup screen to save the global restriction.

Seasonal Holiday Restrictions

To create Seasonal unavailability restrictions, click the 'Seasonal Restrictions' option button to enable the seasonal restrictions section. If you have previously set the Global Restrictions, Mainten-Ace will warn you that the global restriction will be removed in favour of the seasonal restrictions you are about to create.

To create a new restriction, type the maximum number of employees to be allowed unavailable in the '**No more than ?? on holiday between**' text box and then type the date range in the two text boxes. Now click the Add button in the seasonal restrictions section to ass the restriction. You can keep adding the restrictions until you have added sufficient restrictions for future use.

To delete a previously assigned restriction for the selected depot, select the restriction for the list and click the '**Delete Selected Selected**' button.

Setting up Holiday Allowances

Select the '**Holiday Allowances**' item in the '**Setup Options**' list in the '**AttendAce Setup**' screen to view the Holiday Allowances settings.

Mainten-Ace Holiday Allowances allows you to specify the number of holidays your employees are entitled to based on the number of full years service they have completed working for your company.

Holiday Allowances are depot specific so you will need to set up your allowances for each depot you have set up on Mainten-Ace.

The screenshot shows the 'AttendAce Setup' window with the 'Holiday Allowances' section selected in the left-hand menu. The main area contains the following information:

- Setup Options:** Calendar, Calendar Colours, Holidays (selected), Holiday Allowances, Holiday Restrictions.
- Employee Holiday Allowances:** Allowance for depot: Sheffield
- Create New Allowance:** Employees with between [] and [] years service are entitled to []
- Table:**

From Y...	To Years	Holiday Entitlement
0	1	20
1	2	21
2	3	22
3	4	23
4	5	24

Buttons: Close Setup, Delete Selected Allowance, Save Start Of Year. Start Of Year: 01/01 (DD/MM)

In our example here, we can see that employees at this depot earn 20 day holiday for 0 to 1 years service, 21 days holiday for 2 years service and an extra days holiday for every additional years service.

To add a holiday allowance, firstly select the depot that you want to set the allowances for, then type the start and finish years service and the entitlement for that length of service into the text boxes in the 'Create New Allowances' section and click the 'Add' button.

To delete a previously assigned allowance, select it from the list and click the 'Delete Selected Allowance' button.

Setting a Depots Year 'Start Date' for Holidays

The 'Setup' screen also allows you to set the start date for the holidays in the holidays scheduler for each depot. Still in the 'Holiday Restrictions' tab (see previous section), after selecting the depot from the 'Depot' pull down, simply type the day number and month number in the 'Start Of Year' text box in format DD/MM. Remember to click the 'Save Start Of Year' button once you have set the new start date.

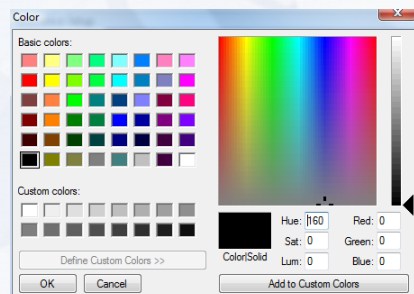
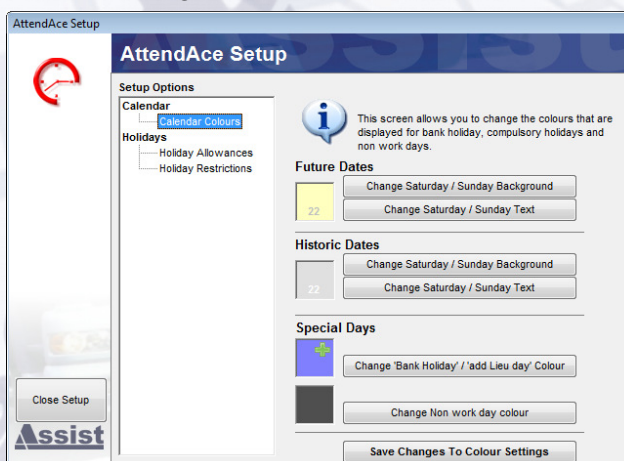
Changing the Standard Calendar Colours

Select the 'Calendar Colours' item in the 'Setup Options' list in the 'AttendAce Setup' screen to view the Holiday Allowances settings.

AttendAce allows you a certain degree of flexibility with the background and text colour coding for your calendar.

From this screen you can alter the background colour and text of Historical Saturdays and Sundays, Future Saturday and Sundays and the background colour of Bank Holiday days and Non-Work Days. Attend Ace shows you a representation of what each day type currently looks like on the calendar on this screen.

Simply click the button representing what you would like to change and then select the colour from the colour picker that AttendAce will display and click OK to accept the new colour.



The colour picker may look differently depending on which Windows operating system you are using.

The next time you refresh the calendar, your new colours will be applied.

Setting specific dates as AttendAce special days

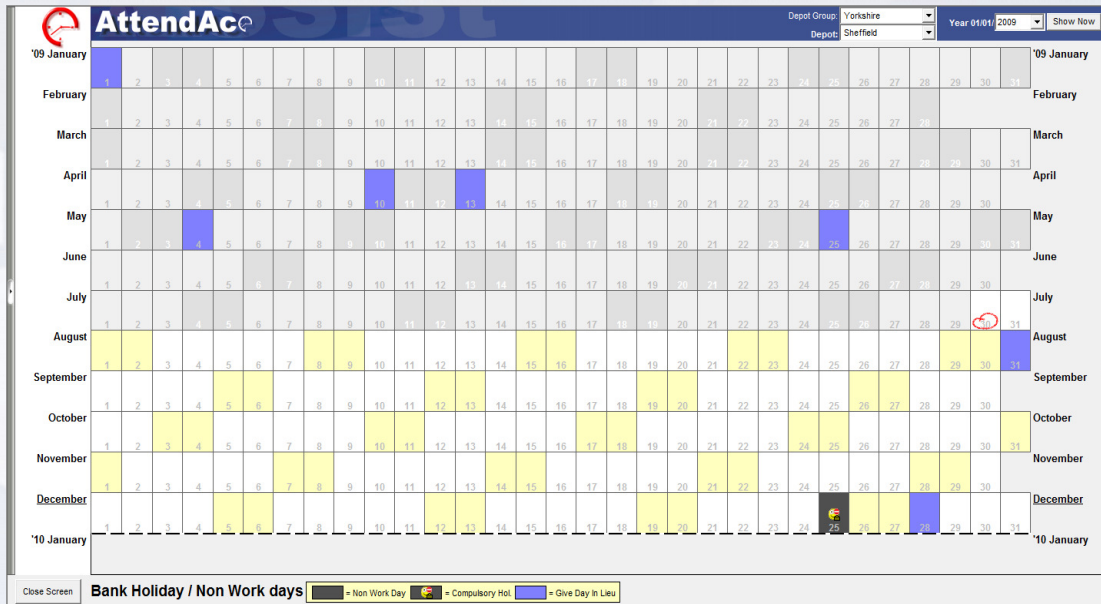
AttendAce allows you set individual days on the calendar as special days.

To begin setting up special days, select **'Setup AttendAce Special Days'** from the **'AttendAce'** menu in Mainten-Ace.

This puts AttendAce into 'Bank Holiday / Non Work Day' Mode. We can tell we are in this mode because no employee unavailability is shown on the calendar and the 'Bank Holiday / Non Work Day' banner is shown at the bottom of the AttendAce screen, showing the legend for the colouring system in this mode.

Bank Holiday / Non Work days = Non Work Day = Compulsory Hol. = Give Day In Lieu

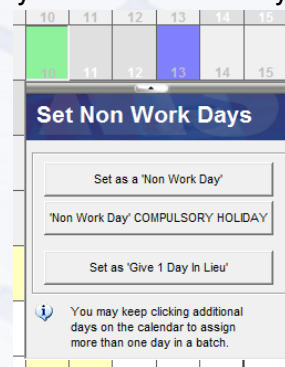
We can see here that Bank Holiday (days that can allow us to give employees 1 day in Lieu) will be displayed as blue, non work days dark grey and compulsory holidays dark grey with a 🇬🇧 icon.



In our example here, we have set 1st Jan, 10th and 13th April, 4th and 25th may, 31st August and 28th December as bank holidays.

To set a date as a special date, in 'Bank Holiday / Non Work Day' mode click the day that you would like to set as a special day. In our example here we have clicked the 10th April and now AttendAce is asking us what type of special day we would like to set this day to.

AttendAce will let us set more than one day at a time as special days. To set more than one day to a special day, just keep clicking days on the calendar. AttendAce will display the 'Set Special Days' popup every time we click another day. If the next day we want to select is underneath the 'Set Special Days' popup, you can either press Escape on your keyboard or click the popup hider button at the top of the 'Set Special Days' popup.



Once you have selected all the days you want to set as special days, click one of the buttons on the 'Set Special Days' popup to set them.

Compulsory Holidays vs Non Work Days

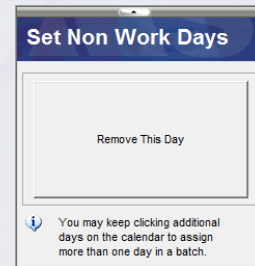
Setting a day as a 'Non Work Day' will prevent users from logging people on holiday on that day. This is similar to setting a 'Holiday Restriction' as zero employees allowed off for that one day except that a 'Non Work Day' can not be overridden by any AttendAce user. So if you do not want any employees to be allowed off for any reason on a specific day, set it as s 'Non Work Day'.

Setting a day as a 'Non Work Day COMPULSORY HOLIDAY' will prevent users from logging people on holiday on that day and automatically take one holiday off of every employee in that Depot for that day. If you have a compulsory shut down period of one week in the year and all employees must take 5 days holiday on those dates, setting the five days as 'Non Work Day COMPULSORY HOLIDAY' will automatically take 5 days holiday from every employee.



Cancelling a special day

If you accidentally set a day as a special day type you can easily cancel it in 'Bank Holiday / Non Work Day' Mode. Simply click the day and then click the 'Remove This Day' button.



Returning to the Default Calendar View After Setting Special Days

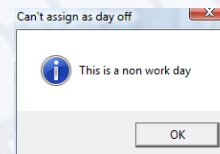
To return to the default calendar mode, click the 'Show Now' button to refresh the calendar.

Special Days in Default Mode Calendar

In the default mode on the calendar screen, days operate differently from normal days:

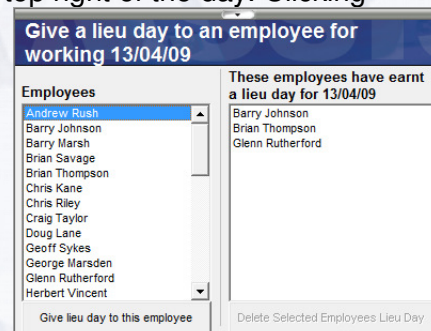
'Non Work Day' Days

A day set as a 'Non Work Day' will display a no entry icon when you hover your mouse over it and will not allow you to log employees on holiday for this day. You will be shown a message saying that 'This is a non work day' if you click a 'Non Work Day'.



'Give 1 Day in Lieu' Days - How To Give an Employee a Day In Lieu

A day set as a 'Give 1 Day in Lieu' will allow you to assign people as on holiday as usual but it will also display a green plus in the top right of the day. Clicking this plus will open up the 'Give a lieu day...' popup. This popup shows a list of all employees on the left hand side and a list of all employees that have previously been assigned a lieu day on that day. From this popup you can give an employee a lieu day by selecting them from the 'Employees' list and then click the 'Give lieu to this employee' button.



Cancelling a Bank holiday from an employee

From this popup you can cancel a previously assigned day in lieu from an employee by selecting them from the list on the right hand side and then click the 'Delete Selected Employees Lieu Day' button.

NB you can also cancel an employees lieu day via the '**Employee Availability**' popup by clicking the '**View / Change / Print Employee Availability**' button at the bottom left of the calendar when in default calendar mode, select the employee, then click the lieu day in the '**Lieu Days Earned**' list and click the '**Delete Selected**' button

Database tools

Compacting and Repairing the Maintena-Ace database

Over time, the Mainten-Ace database becomes larger in size. The database can be made smaller on the disk by selecting '**Compact and Repair Database**' from the '**Database Tools**' menu item within the '**Administrator Menu**'.

The database may become corrupt if you have a system failure or power cut for example, you may need to run '**Compact and Repair Database**' from the '**Database Tools**' menu item within the '**Administrator Menu**' too.

NB You can only run a compact and repair when there are no other users logged into Mainten-Ace. If you are using the Transport Ace database for Mainten-Ace no one should be logged into Transport Ace either.

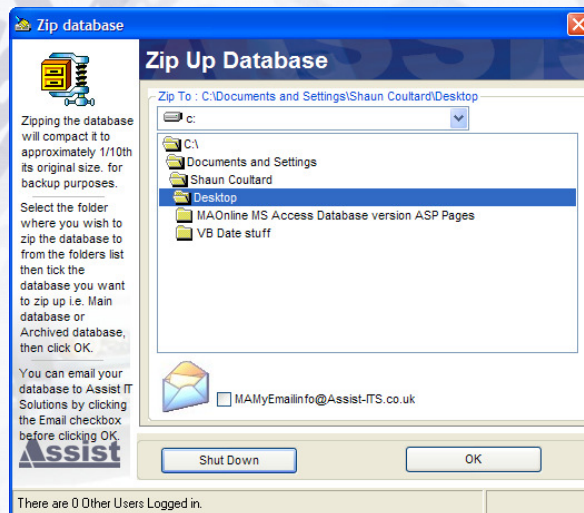
NB If the database has become corrupt and as a result you can not run Mainten-Ace, there is a separate program called RepairMA.exe in the Mainten-Ace directory on all computers with Mainten-Ace installed. Simply locate and run this program by double clicking it to repair the database. The default path for Mainten-Ace is C:\Program Files\MaintenAce\

Zipping up the database

Mainten-Ace includes a compression facility that compresses the database into a .ZIP file. This effectively makes the database take up about 1/10th of it's real size. You may want to zip up the database for two reasons.

1. If you are still backing up to floppy disks or a medium that has low storage capacity.
2. If you want to send the database over email to Assist IT Solutions for testing purposes.

To zip the database, select '**Zip Up Database**' from the '**Database Tools**' menu item within the '**Administrator Menu**'. The '**Zip Database**' screen is displayed. To zip the database simply choose where you want to zip it up to by selecting the disk drive from the pull down and pointing to the folder / directory from the folder list.



Mainten-Ace can automatically open up your email system with a email to Assist IT Solutions if you click on the 'Email to info@Assist-ITS.co.uk' check box. Click on the OK button to zip up the database.

Configuring Mainten-Ace

There are two main setup screens within Mainten-Ace, the Company Setup screen where you can set features specific to your company and the 'Setup' screen where everything else is handled.

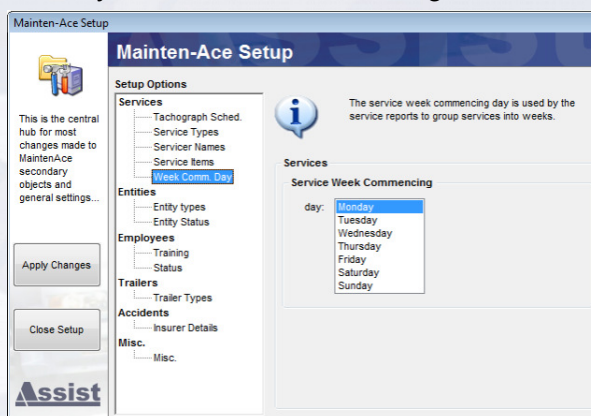
To access the setup screen, select '**Setup**' from the '**Administrator Menu**'. To access the Company Setup screen, select '**Company Setup**' from the '**Administrator Menu**'.

Setting the 'Week Commencing Day'

The '**Setup**' window allows you to specify the day of the week commencing used in the services screens and the number of days between Tacho Calibrations and Tacho Calibrations.

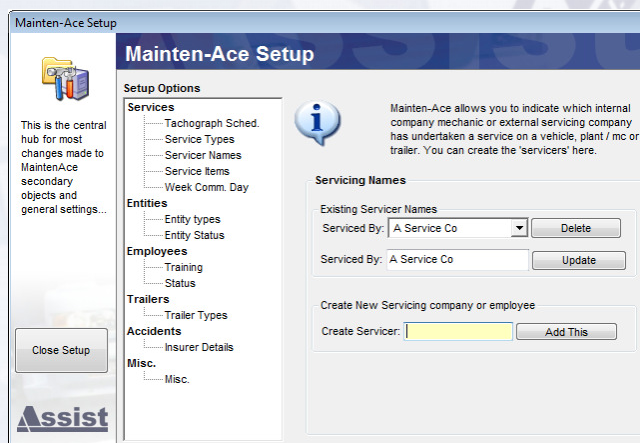
Select the day from the pull-down list and either type the number of days for tacho recal and checks or use the up-down buttons to change the value then click the '**Apply Changes**' button to make the changes come into effect.

Be sure to click the 'Apply Changes' button once you have changed the WC day.



Adding and Deleting Fitters and Service companies

Select the '**Servicer Names**' from the '**Setup Options**' list from the '**Setup**' screen.



Add a Servicer

To add a servicer, simply type the name of the fitter or the company that services your vehicles in the '**Create Servicer**' text box and then click the '**Add This**' button. The servicer is then added to the system and you can now select them from the 'Serviced By' pull down box's.

Deleting and Amending Servicer

The '**Serviced By**' pull down box will contain a list of all servicers that you have previously created in Mainten-Ace. To delete a servicer select them from the pull down list and then click the '**Delete**' button. NB you can not delete a Status if any vehicles or trailers are assigned to that status.

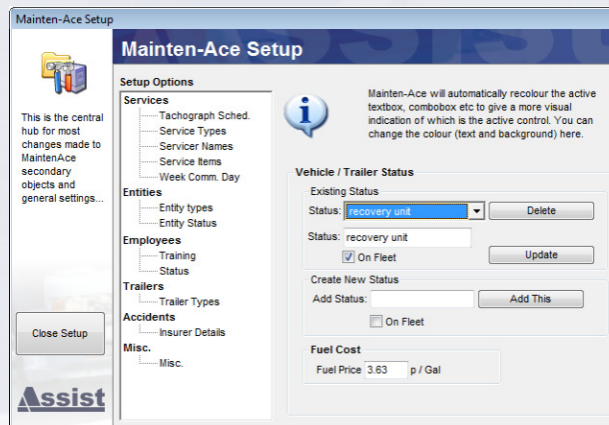
To Change the name of the servicer or servicing company, overwrite the 'Serviced By:' text box with the new name. NB important: if you rename a servicer, every reference in any service that uses that servicer will be changed!

Adding and Deleting Vehicle and Trailer Status's

Select the **'Entity Status'** item in the **'Setup Options'** list in the **'Setup'** screen.

By default, Mainten-Ace has one status for vehicles and trailers, **'Current'** all new vehicles and trailers are assigned this status by default. You can change an entities status to any of the status's that you add to Mainten-Ace in setup.

You may want to add a Scrapped and Sold status to the system so you can change the status of a vehicle or trailer when it is scrapped or sold.



Add a Vehicle / Trailer Status

To add a Status simply type the description of the Status in the **'Add Status'** text box and then click the **'Add This'** button. The Status is then added to the system and you can now select it from the 'Status' pull down box's.

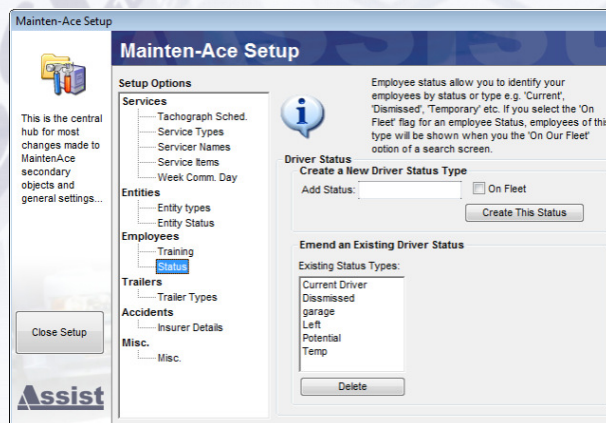
Deleting a Status

The **'Status'** pull down box will contain a list of all Status's that you have previously created in Mainten-Ace.

To delete a Status select it from the pull down list and then click the **'Delete'** button NB you can not delete a Status if any vehicles or trailers are assigned to that status.

Adding and Deleting Employee Status's

Select the **'Status'** item under the 'Employees section of the **'Setup Options'** list in the **'Setup'** screen. When you installed Mainten-Ace a **'Current'** employee status was automatically. This is the default status for any new employees you create but you can change the status to any of the status's that you add to Mainten-Ace in setup. Some customers have chosen to add a Potential, Temp or Left status for employees.



Add an Employee Status

To add an employee status, simply type the description of the Status in the **'Add Status'** text box and then click the **'Add This'** button. The Status is then added to the system and you can now select it from the 'Vehicle Status' pull down box's in the Employee screens.

Deleting an Employee Status

The **'Status'** pull down box will contain a list of all Status's that you have previously created in Mainten-Ace.

To delete a Status select it from the pull down list and then click the **'Delete'** button
NB you can not delete a Status if any vehicles or trailers are assigned to that status.

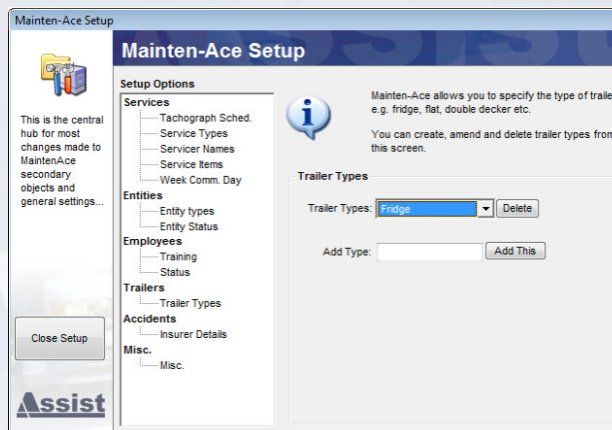
Adding and Deleting Trailer Types

Mainten-Ace allows you to identify what type of trailers you own, e.g. flat bed etc.

You can add new trailer types in setup from the **'Trailer Types'** tab.

Adding a Trailer Type

To add a Trailer Type simply type the description of the Trailer Type in the **'Add Type'** text box and then click the **'Add This'** button. The Trailer Type is then added to the system and you can now select it from the **'Trailer Type'** pull down box's.



Deleting a Trailer Type

The **'Trailer Type'** pull down box will contain a list of all Trailer Types that you have previously created in Mainten-Ace.

To delete a Trailer Type, select it from the pull down list and then click the **'Delete'** button

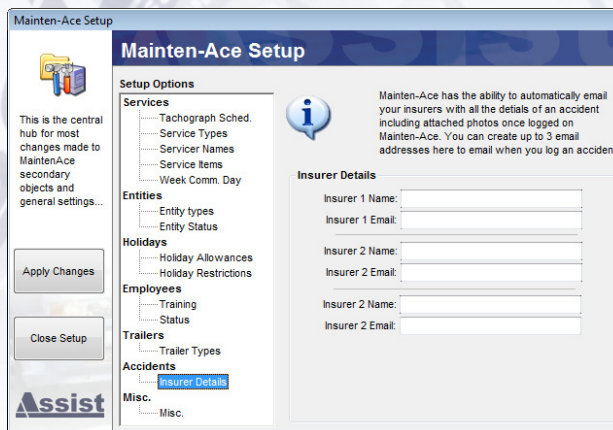
NB you can not delete a Trailer Types if any Trailers are assigned to it.

Setting up your Insurers Details for automatic emailing of accidents

Mainten-Ace allows you to store up to 3 contact email addresses and can send an email to these addresses when you log an accident.

Simply type the name of the insurer in the **'Insurer # Name'** text box and the email address to send the email to in the **'insurer # Email'** text box.

You can also use this facility to email someone in your company by creating an entry for them if they require an email informing them of the accident.

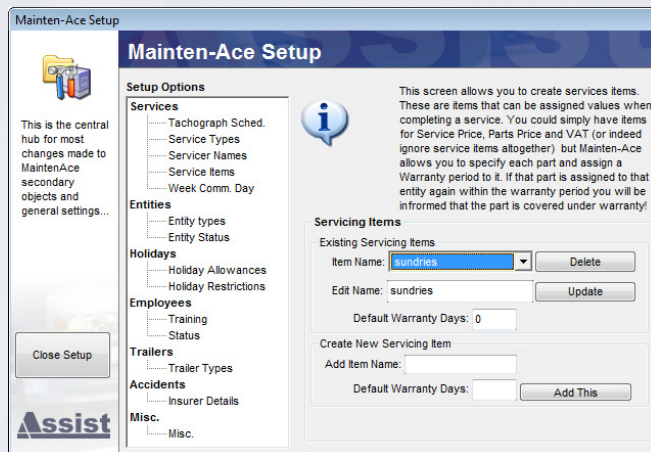


Be sure to click the 'Apply Changes' button when you are done.

Creating Service Item Categories

Mainten-Ace allows you to break-down your vehicle service costs for each service. In order to do this, you must first specify the categories that you would like to break the services down to.

One example is you may merely want to specify the labour and parts costs. Some companies may want to specify a full break-down of every cost of a service from oil filter up to clutch fitment.



You will obviously need to do some preparation in advance to determine what type of costing break-down you will need. The chance are, you already do this on a paper or spreadsheet system and you will just need to replicate your existing system here.

You add the service item categories in the **'Service Item'** tab of the **'Setup'** screen. To add new service item categories, simply type the name

of the new category in the **'Add An Item'** text box and click the **'Add This'** button.

Renaming a Service Item Category

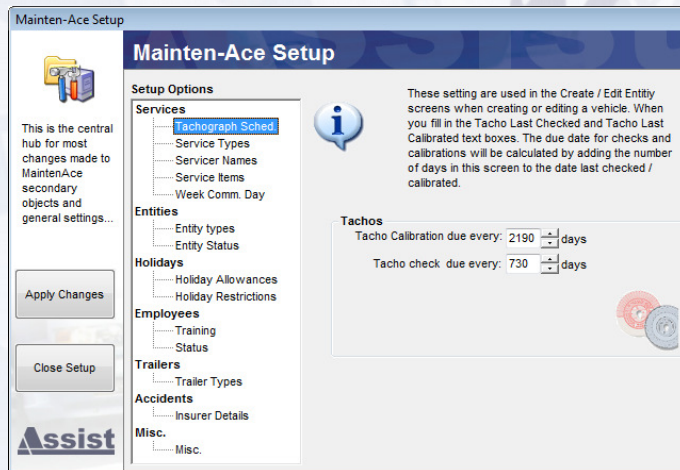
To rename an existing item category, select it from the **'Item Name'** pull down, retype the name of the category in the **'Edit Name'** text box and click the 'Update' button.

Deleting a Service Item Category

To Delete a Service Item Category, select it from the **'Item Name'** pull down and click the **'Delete'** button.

Setting the Tachograph Calibration and Check periods

In the Setup screen click the **'Tachograph Sched.'** item in the **'Setup Options'** list



and then either type the number of days between tachographs checks and calibrations in the relevant text boxes or use the up / down arrows.

Be sure to click the 'Apply Changes' button to save your changes when you are done.

Adding Company Groups and Depots

Mainten-Ace allows you (or rather forces you) to group your company entities into logical groups to make them easier to handle and to allow you to restrict certain Mainten-Ace users to only be able to see certain entities.

If your company has O'licenses, Mainten-Ace allows you to specify the O'License that a group of vehicles are on. Depending on how you are grouping your company, you can either assign an o'license to a Group or a depot. If you do not have O'licenses or there is no O'license for a particular group or depot, just leave it blank.

To create or edit a company group or depot, open the '**Company Setup**' screen by clicking the '**Administrator Menu**' and selecting '**Company Setup**' from the popup menu that appears.

From the '**Company Setup**' screen, select '**Our Depots**' from the '**Setup Options**' list.

Creating a Company Group

To create a company group, in the '**Create New Group**' section of the screen, type the O' Licence Number in the '**O' Licence No**' text box (if the vehicles assigned to that depot or group are assigned to an O'license) and then type the name you want to refer to the Group within Mainten-Ace in the '**Location**' text box. Click the '**Add This**' button to create the group.

Deleting a Group

To delete a group, select it from the '**Existing Groups**' list and then click the '**Delete**' button.

NB you can not delete a group if any Depots exist on Mainten-Ace for this group or if any entities are assigned to the O'License.

Adding a Depot to a Group

To add a depot, you must first choose the Group that this Depot applies to from the '**Existing Groups**' list.

Simply type the description of the depot in the 'Location' text box and then click the '**Add This**' button.

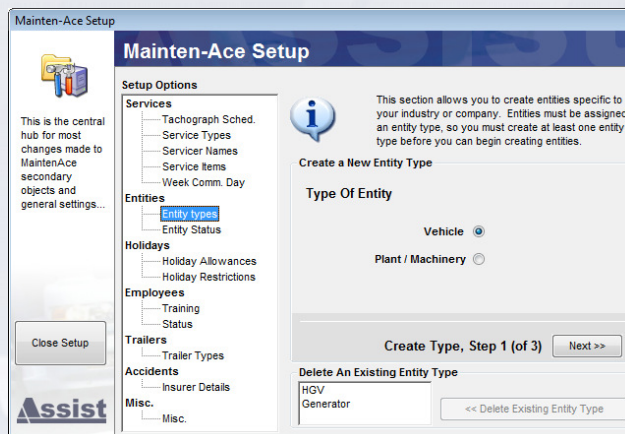
Creating and Deleting Entity Types

Creating Entity Types

Mainten-Ace allows you to handle any type of entity that your company may need to schedule servicing for, but before you can create an entity (other than employees and trailers) you must first create an entity type within Mainten-Ace to assign the entity to.

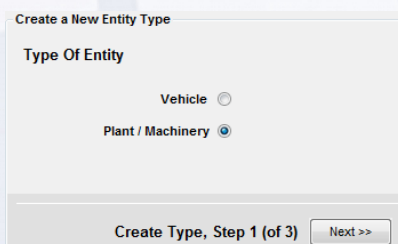
In our example here, we have already created two types of entity that our company needs to service, i.e. HGV and Generator.

If this company also owns Forklift Trucks that it wants to manage using Mainten-Ace it will first need to create Forklift trucks as an Entity Type.

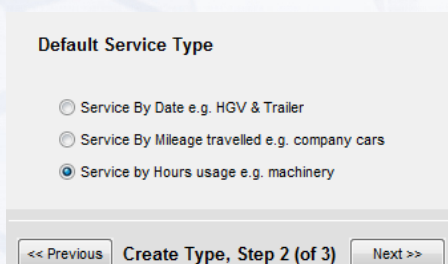


Creating an entity type is done in three simple steps:

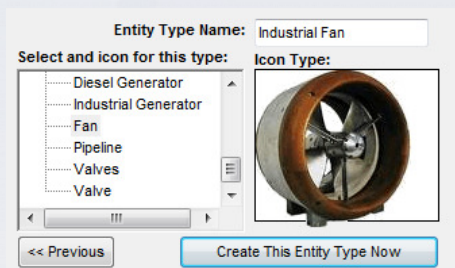
- 1) Select the type i.e. Vehicle or Plant and Machinery
NB if you create an entity type and set it to a type of Vehicle, an additional tab for **'Vehicle Maintenance Details'** will be visible in the **'Edit an Entity'** screen and you will also be able to provide a **'Ministry ID'** and check the **'Uses External Trailer'** option.



- 2) Select the type of default servicing schedule we want to use for the entity:
NB when we create an entity and assign it to the entity type we are creating here, it will automatically be assigned the default service schedule we select here. This is only a default and can be changed for individual entities but is here as a time saving feature when creating entities.



- 3) Input a name that you want to identify with this new type of entity and select an icon type from the list of available icons.

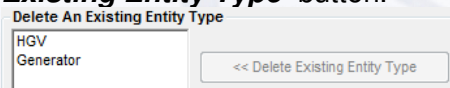


Once all three steps have been completed, click the 'Create This Entity Type Now' button and the Entity Type is then created and we can now create entities of this new type.

In our example here, we have just created a new entity type called industrial fan, that by default when we create an entity and assign it to a type of 'Industrial Fan', it will be assigned a service schedule of 'By Hours Used' and will not have the 'Vehicle Maintenance Tab' visible when we edit it because we have assigned this entity type to **'Plant / Machinery'**

Deleting Entity Types

From the same screen as we use to create Entity Types, simply select an existing Type from the **'Delete An Existing Entity Type'** list and then click the **'<< Delete Existing Entity Type'** button.



NB you can only delete entity types if you do not have any entities assigned to this type.

Creating and Deleting Training Types

If you have subscribed to the Training Module on your Mainten-Ace account, Mainten-Ace allows you to

Log training and identify when training id due for renewal. Mainten-Ace allows you to add the types of training (or qualifications) that your employees will attain and set individual warning periods for each type of training.

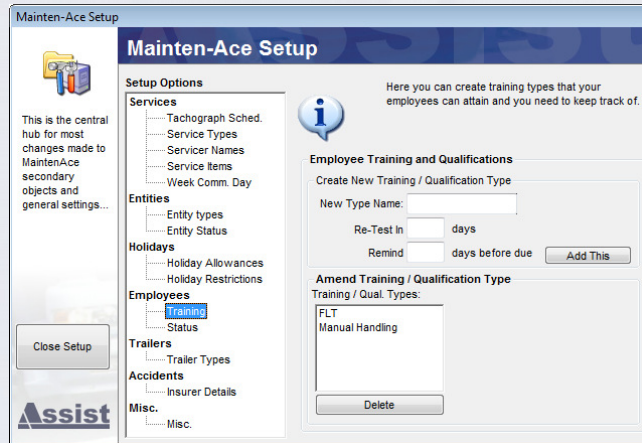
To create or edit a training type, open the **'Setup'** screen by clicking the **'Administrator Menu'** and selecting the **'Company Setup'** menu item from the popup that appears.

In the Setup screen click the **'Training'** Item in the **'Employees'** section of the **'Setup Options'** list to view the Employee Training and Qualifications settings page.

Creating a New Training Type

Type the name of the training (or qualification) in the 'New Type Name' text box then type the number of days until the re-test for this type of training in the '**Re-Test In days**' text box.

Mainten-Ace will warn you in advance when the training is due for renewal. Type the number of days you would like to be pre-warned in the '**Remind days before due**' text box.



Deleting a Training Type

To delete a training type, in the same screen you used to create the training type, select the existing type from the list at the bottom of the screen and click the 'Delete' button

Amending a Training Type

To delete a training type, in the same screen you used to create the training type, select the existing type from the list at the bottom of the screen then overwrite the current details in the text boxes that appear to the right of the list and then click the '**Update**' button.

