

*INTRODUCTION*  
*TO*

**MP2**

MAINTENANCE MANAGEMENT SYSTEM

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Revision  
1.01

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## Overview of MP2 - FAQs

### What is MP2?

MP2 is a Computerized Maintenance Management System, or **CMMS**.

### Why does Stony Brook use a Computerized Maintenance Management System?

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Different departments use MP2 for different reasons. Some uses include:

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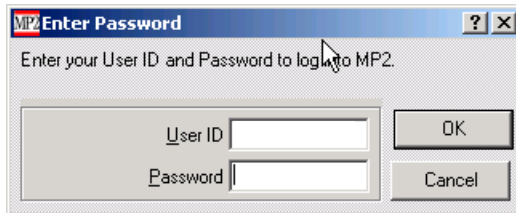
- scheduling regular maintenance
  - tracking call-in requests for repairs
  - determining cost efficiency of repairs
  - keeping history of work performed
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# LOGGING INTO MP2

Click on the MP2 icon on your desktop:



Enter:           USER ID  
                  Password



**NOTE:** If MP2 does not start when you click on the icon, or if you are unable to log in, contact Client Support at 2-9800.

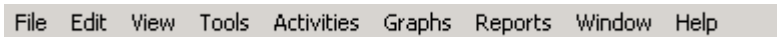
## MP2 MAIN PAGE

### ◆ Title Bar



The title bar includes the name of the program or form, as well as the minimize/maximize or help button and the close button.

### ◆ Menu Bar

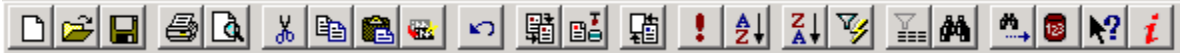


When you choose an item from the menu bar, MP2 displays a “drop-down” menu that lists main topics for that item. If you choose an item from a drop-down menu that has a > MP2 displays another menu. Continue choosing menu items until you reach the destination form or function.

Refer to these descriptions when accessing the MP2 menu bar:























| <b>MENU</b>       | <b>FUNCTION</b>  |
|-------------------|--|
| <i>File</i>       | Opening, saving, and closing forms; printing; changing home site; logging out users; and exiting MP2 |
| <i>Edit</i>       | Entering and editing information; searching for records  |
| <i>View</i>       | Refreshing, sorting, and filtering information; customizing MP2's toolbar and Quick Access Bar       |
| <i>Tools</i>      | Accessing Wizards, setting up MP2, changing your password, and customizing the MP2 desktop           |
| <i>Activities</i> | Entering, processing, and generating information   |
| <i>Graphs</i>     | Creating, viewing and printing graphs  |
| <i>Reports</i>    | Creating, viewing and printing reports   |
| <i>Window</i>     | Navigating between open forms  |
| <i>Help</i>       | Accessing MP2 Help, Tips of the Day  |

## ◆ Toolbar



You can access many of MP2's functions from the toolbar. When you rest the mouse pointer over a button, MP2 displays a pop-up description of the button's function.

Refer to this list for Toolbar functions

-  → Displays a dialog box from which you can open an MP2 form.
-  → Displays a dialog box from which you can open an existing report, graph or label.
-  → Saves the current form layout.
-  → Prints the report associated with the current form.
-  → Displays the report on screen.
-  → Cuts the selected text to the clipboard.
-  → Copies the selected text to the clipboard.
-  → Pastes the text from the clipboard into the current field.
-  → Copies data from the previous record's field when MP2 displays information in a tabular format.
-  → Removes the last edit if you have not moved the cursor from the field.
-  → Copies the current record to the clipboard.
-  → Pastes the copied record from the clipboard.
-  → Removes the changes for the entire record if you have not yet posted the record.
-  → Refreshes the form, showing all changes that you or other users have made.
-  → Sorts the current form by the current field in increasing order.
-  → Sorts the current form by the current field in decreasing order.
-  → Filters the current form by the current field.
-  → Disables the applied filter on the current form.
-  → Displays a dialog box from which you can search for a record by entering a particular value in a field.
-  → Searches for the next occurrence of the search value.
-  → Displays, in the status bar, the number of records contained in the current form.
-  → Invokes the context-sensitive help and changes the cursor to a question mark and pointer.

## ◆ Quick Access Bar



Quick access buttons are shortcuts for opening MP2 forms and reports. MP2 displays the Quick Access bar in the center of the main window when you have no forms open. MP2 moves the Quick Access bar to the left side of the main window when you open a form. **You can customize the quick Access bar to display icons for those functions you perform most often by right-clicking on it.**

## ◆ Status Bar



The Status Bar, used with the Record Count button, displays the number of records in the current form.

# DIFFERENT ROLES – DIFFERENT ACCESS

It is important to remember that people within each department use MP2 for different reasons. Some users create work orders from an emergency desk. Others enter timesheet information. Others may schedule maintenance work orders. Some people within the same department will see different screens based on their job function. (MP2 calls these access levels “roles”)

## FORMS

MP2 displays information in easy-to-read objects called forms. Forms consist of records, which consist of fields. Most forms contain at least two tabs, List View and Record View, which display information in different formats. Some forms contain multiple tabs, to show other detailed information. For example, the Work Order History form contains List View, Record View, Equipment and Details, Schedule, Attachments, and User-defined Fields.

**List View:** Use List View to quickly locate a specific record or to enter, view or edit information on many records at one time, in one location, in a spreadsheet view of the records in the form.

**Record View** displays the record selected in List View. Use Record View to view, enter, and edit information in records.

# FORMS *(continued)*

## Ellipsis Button



The ellipsis button appears when you enter a field that has a hidden list of data – if you click on the ellipsis, you will see a list of choices.

**NOTE:** If there is already a value entered in that field, your list will be “filtered” with that value by default. To see all values, change the filter to “None”.

## Read Only Fields

These fields are shaded in gray and users are unable to edit any information in these fields.

## Required Fields

These fields are shaded in red and are for required information.

## Sort By

This allows you to sort specific information in ascending or descending order.

## Filter

This allows you to filter the data in the form by specified criteria.

Refer to this list for Form toolbar functions.

### BUTTON

### FUNCTION



Displays the first record in the current form



Displays the previous record in the current form



Displays the next record in the current form



Displays the last record in the current form



Inserts a new record



Deletes the selected record.  
NOTE: Most users do not have access to delete



Displays a list of options, specific to a form



Displays the Find dialog box with which you can search for a record using a particular value in a field. Available on all lookup forms



Searches for the next occurrence of the search value. Available on all lookup forms.

# FORMS *(continued)*

## Switch Among Open Forms

You can have several forms open at one time. MP2 keeps the active form on top of the other open forms.

Follow these steps when switching among open forms.

- ❑ Choose **Window** from the menu bar. MP2 displays the Window menu, which lists the open forms.
- ❑ Select the name of the form to make active. MP2 displays the form.

## Open Previously Opened Forms

As in other Windows applications, you may view and open the previous four objects you opened. In MP2, these objects are normally forms.

Follow these steps when opening previously opened forms.

- ❑ Choose **File** from the menu bar. MP2 displays the File menu, which lists the last four opened forms near the bottom.
- ❑ Select the name of the form to open. MP2 displays the form.

NOTES:

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# CREATING WORK ORDERS

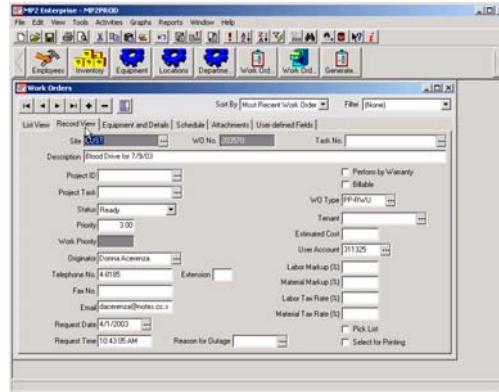
Follow these steps when creating a work order.

- ❑ Choose *ACTIVITIES / WORK ORDERS / WORK ORDERS* from the menu bar. MP2 displays the Work Orders form

## 1) RECORD VIEW

- ❑ Click the Record View tab. MP2 displays the Record View page.

Site: MP2 organizes information by separating it into **Sites**. For example, WCPP is a separate Site from UHPP. Some users may have "read only" access to certain Sites.



Refer to Exhibit A in back of workbook for explanations of different fields.

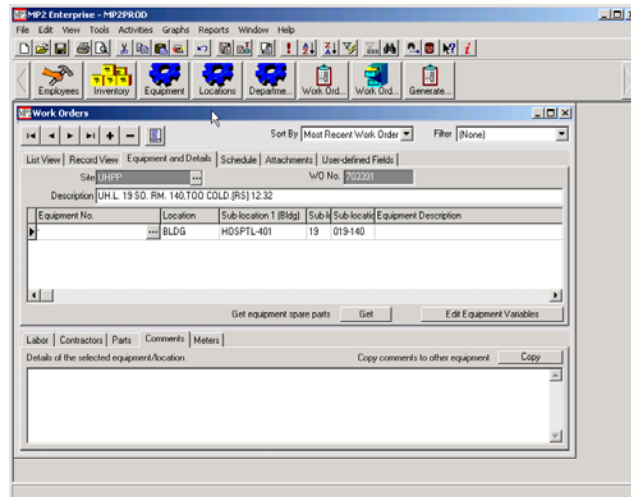
- ❑ Click + to insert a new record. MP2 creates a work order record and populates **Site** with your home site. (NOTE: If you have access to multiple sites, and the work order belongs in a different site, you must change the site **before** you enter anything else or leave that field).

**NOTE: A Work Order number will be automatically assigned by MP2 when you tab or click out of SITE. Once this Work Order number is assigned, you cannot change the SITE.**

- ❑ Description – Enter a description of the work
- ❑ WO Type – Enter the code identifying the type of work
- ❑ Originator – Enter the **first and last** name of the individual who called in or requested the work. (**Do not use the ellipsis button – this contains employee numbers, not names.**)
- ❑ Telephone – telephone extension, e.g. 2-1234
- ❑ E-mail address – if available, e.g. john.smith@stonybrook.edu
- ❑ Request Date / Request Time – these fields are filled-in automatically with current date and time; if the request was made earlier, these fields should be changed accordingly.
- ❑ Expense Class / User Account – If the work will be billed to another account, then enter the account number in this field. To see a list of valid University accounts, click on the ellipsis button.  
**NOTE:** For RF accounts, only the Project Number is used.

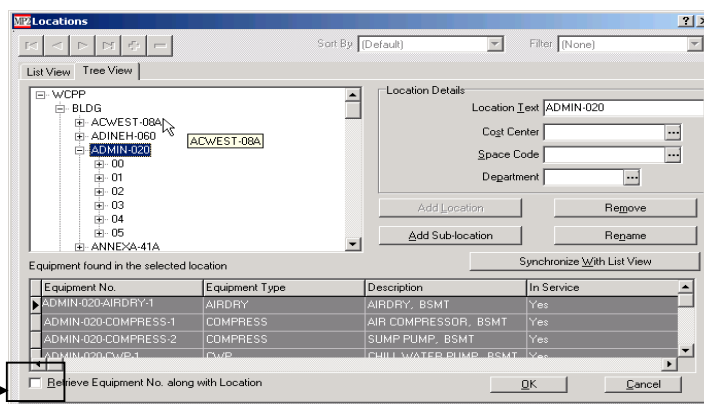
## 2) EQUIPMENT AND DETAILS

- Click the Equipment and Details tab. MP2 displays the Equipment and Details page.



- Choose one of these options:
  - Location – (Most Work Orders are entered by Location) Enter the codes identifying the location at which to perform maintenance. By clicking on the ellipsis button inside the Location field, you will see the Locations form; use the Tree View tab to choose the location as precisely as possible (down to the floor or room).

**Important Note:** Choose the location from the tree with the same Site ID as the work order you have created.

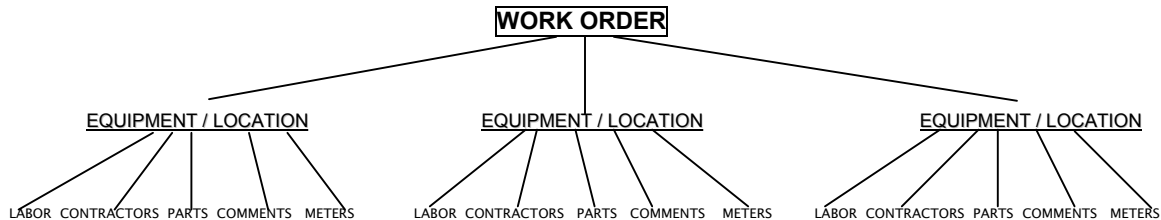


Note: If you check mark this box, you must uncheck it after you have finished.

- Equipment No. – Enter the code identifying the equipment on which to perform maintenance. Click on the ellipsis button inside the Equipment Number field in order to choose the appropriate piece of equipment. By entering Equipment information, the Location is entered automatically.

## 2) EQUIPMENT AND DETAILS (continued)

It is important to understand the relationship between the Equipment and Details tab and the tabs located on the lower portion of the screen. For each item entered into either Equipment, Location, or both, MP2 recognizes each line as an individual asset. Information for each asset can be added into the tabs entitled Labor, Contractors, Parts, Comments, and Meters.



**LABOR:** Enter employee code, last name, first name, estimated hours

**CONTRACTORS:** Vendor name, worker's wage rate

**PARTS:** Enter all parts necessary to complete the work. MP2 prints required parts on work orders for reference.

**COMMENTS:** Add comments that are beneficial to the individual performing the work. You can add different comments for each equipment record. MP2 prints comments on the Work Order (Long Format) only.

**METERS:** Enter any meter readings.

**SCHEDULE tab:** [SEE EXHIBIT B \(separate attachment\)](#)

## UPDATING WORK ORDERS

Collect labor and parts information for a work order, and then quickly enter this information. Add closing comments, if necessary.

Follow these steps when updating individual work orders.

1. Choose ACTIVITIES / WORK ORDERS / QUICK WORK ORDER UPDATE from the menu bar. MP2 displays the QUICK WORK ORDER UPDATE form.
2. WO No. – Enter the code identifying the work order to update.
3. Select the equipment or location to update, and then update labor, parts, and comments, as necessary.
4. Choose one of these options:
  - Click  X to close the form and save changes to the work order.
  - Click NEXT WO NO. to update another work order.  
MP2 displays a message asking whether to close the current work order.
5. Choose one of these options:
  - Click **Yes** to close the work order and save it to history.
  - Click **No** to update the work order and continue adding closing information.

## PRINTING WORK ORDERS

Print work orders automatically after generating them, or print individual or multiple work orders manually after creating them.

Follow these steps when printing individual work orders.

- ❑ Choose *ACTIVITIES / WORK ORDERS / WORK ORDERS* from the menu bar. MP2 displays the Work Orders form.
  - ❑ Locate the work order to print, and then choose one of these options:
    - ◆ *Print basic work order information* –  
Choose **Print Work Order** (Short Form) from the options menu.
    - ◆ *Print detailed work order information* –  
Choose **Print Work Order** (Long Form) from the options menu.
- MP2 displays the Work Order print dialog box.
- ❑ Click OK. MP2 prints the work order.

## SEARCHING / FILTERS / SORTING

### SEARCHING FOR RECORDS



Search for any record in a form by searching for a known field value. For example, you can search for a work order assigned to a particular employee by searching for the employee's code in Assigned To on the Schedule page of the Work Orders form.

Follow these steps when searching for records.

- ❑ Open the form, and then place the cursor in the field by which to search.
- ❑ Choose *Edit / Find* from the menu bar. Mp2 displays the find dialog box.

A screenshot of the 'MP2 Find' dialog box. The title bar reads 'MP2 Find' with a question mark and close button. The dialog contains four input fields: 'Find what' with the value '330840', 'Field' with a dropdown menu showing 'WO No.', 'Search' with a dropdown menu showing 'Within Current Filter', and 'Match' with a dropdown menu showing 'Any Part of Field'. To the right of these fields are three buttons: 'Find Next', 'Find Previous', and 'Close'. At the bottom right, there is a checkbox labeled 'Match Case' which is currently unchecked.

**Find What** – Enter the search value.

## SEARCHING / FILTERS / SORTING *(Continued)*

- ❑ **Match** – Select a search option.
- ❑ **Match Case** – Select to search for the value that matches the case (upper or lower) of the letter/number sequence you entered in **Find What**.

If you applied a filter to the active form, MP2 activates **Search** in the Find dialog box. Select to search either the ENTIRE TABLE (Reset Filter) or only WITHIN CURRENT FILTER.

- ❑ Click **Find First**. MP2 filters the form by the criteria you defined and displays the first record that matches the criteria.



### ***FILTER RECORDS***

Filter a form, and MP2 displays only records that meet the criteria you specify. For example, you can apply a filter to the Work Orders form to display only work orders assigned to a specific location.



### ***SORTING RECORDS***

Sort forms by a specific field and MP2 displays the records in either ascending or descending order, depending on the selection.

Follow these steps when sorting records.

- ❑ Open the form to sort, and then click the List View tab. MP2 displays all records in the form.
- ❑ Select the field by which to sort the form, and then choose one of these options.
  - ◆ *Sort ascending* – click AZ↓ to sort records either alphabetically or numerically by the selected field.
  - ◆ *Sort descending* – click ZA↓ to sort records in either reverse alphabetical or reverse numerical order by the selected field

**TIP:** To undo a sort, select (Default) from **Sort By**.

NOTE: The sort order is case sensitive, sorting uppercase letters before lowercase letters, following this sort order:

1. Symbols
2. Numbers
3. Uppercase letters
4. Lowercase letters

## CUSTOMIZING SCREENS

Customize your MP2 desktop by specifying colors for forms and dialog boxes; adding your most frequent functions to or deleting unused functions from the Quick Access bar; and specifying whether to display the Toolbar.

*Customize the Toolbar* to suit your needs:

- Choose *VIEW / TOOLBAR* from the menu bar. MP2 displays the Toolbar dialog box.

- Select one or more of these options:

- Toolbar** – Select to display the toolbar
- Color Buttons** – Select to display the toolbar buttons in color
- Large Buttons** – Select to display large buttons
- Show tooltips** – Select to display a description of the button function when you rest the mouse pointer over the button
- With Shortcut Keys** – Select to display the keyboard shortcut with the tooltip

- Click **OK**

*Customize the Quick Access Bar* to display buttons for frequently used activities, reports, and graphs. When you open a form, the Quick Access bar moves to the left side of the main window. Once you close the last form, it moves back to the center of the main window. Move the Quick Access bar by clicking on a non-button region of the bar, and then dragging the bar to the top, bottom, or right border of the window.

Follow these steps when customizing the Quick Access bar:

- Choose *VIEW / QUICK ACCESS BAR* from the menu bar. MP2 displays the Quick Access Bar dialog box.
- Refer to this table when customizing the Quick Access bar:

| <b>FUNCTION</b>      | <b>PROCEDURE</b>  |
|----------------------|---|
| Add existing buttons | Select, from the Activities, Reports, or Graphs page under <b>Available</b> , the button to add, and then click >   |
| Create new buttons   | Click <b>New</b> . MP2 displays the New Button dialog box. Specify the <b>Label</b> for the button, the file name to which it links, and the icon according to the button type. Click <b>OK</b> . |
| Move buttons         | Select, under <b>Selected</b> , the button to move, and then click ^ to move the button up in the order, or click v to move the button down in the order.   |
| Remove buttons       | Select the button under <b>Selected</b> , and then click <  |

- Click **OK**