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# LUBE-IT 5.5 WHAT'S NEW

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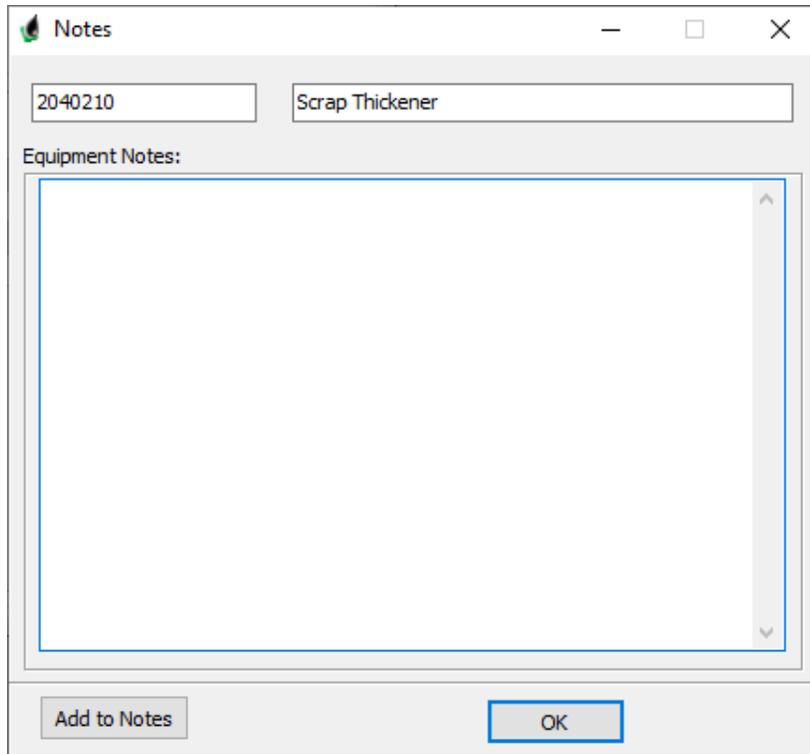
## New Features

### I. Equipment Manager

#### i. Equipment Notes (LI5-2214)

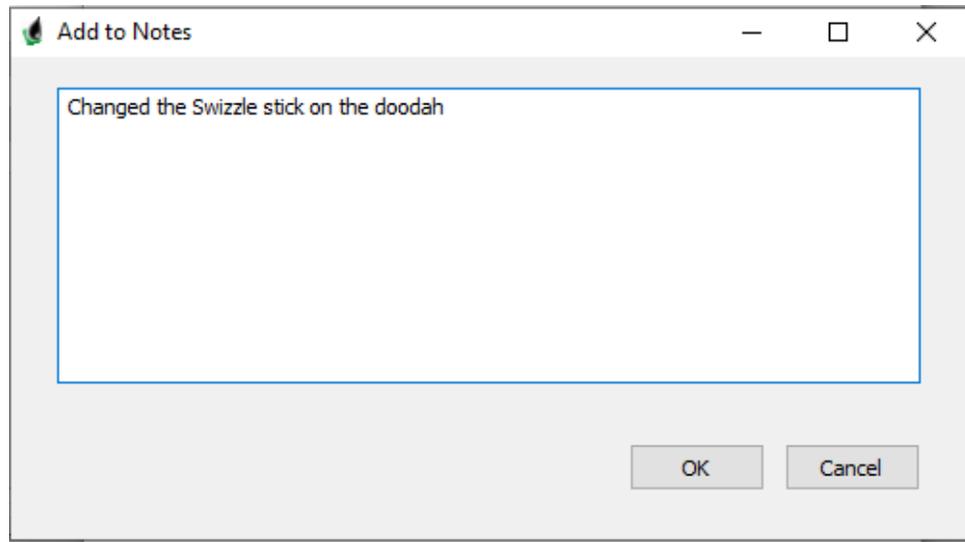
Full rights or Admin users can view and edit Equipment Notes normally. Now partial rights users can be given permission to add to notes (Menu option: Utilities -> Password Manager). Notes may be

added by clicking on the Notes button  from the Equipment tab of Equipment Manager, then selecting the "Add to Notes" button from the notes form:

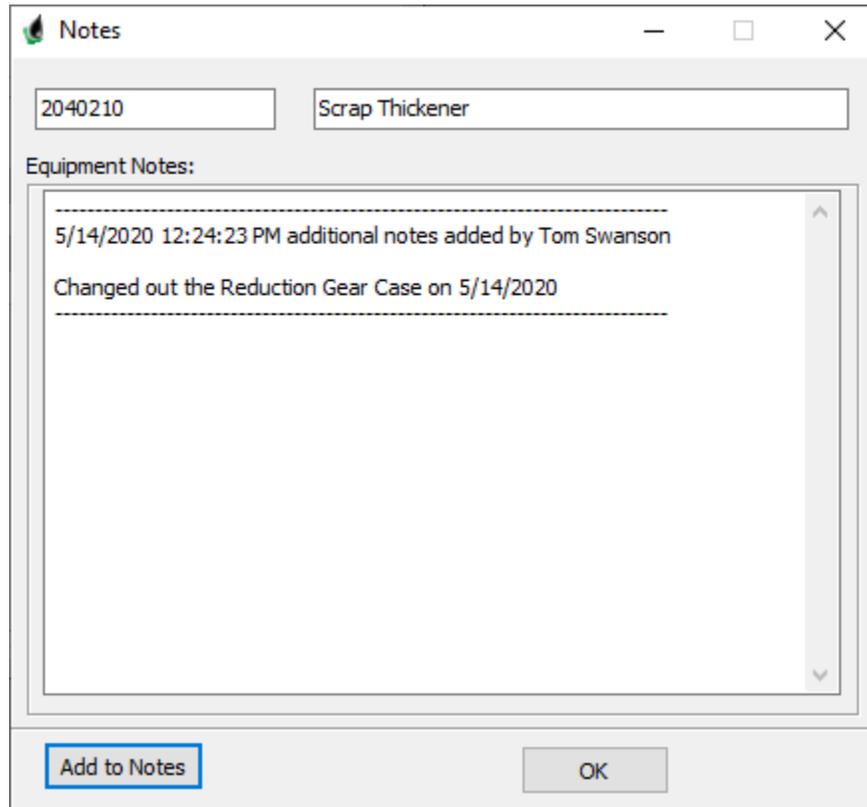


The screenshot shows a dialog box titled "Notes" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the dialog, there are two text input fields. The first field contains the number "2040210" and the second field contains the text "Scrap Thickener". Below these fields is a large, empty text area with a vertical scrollbar on the right side, labeled "Equipment Notes:". At the bottom of the dialog, there are two buttons: "Add to Notes" on the left and "OK" on the right.

And they will see the Add to Notes window. Then simply fill in the information they want to add to the note.



Then click the OK button.

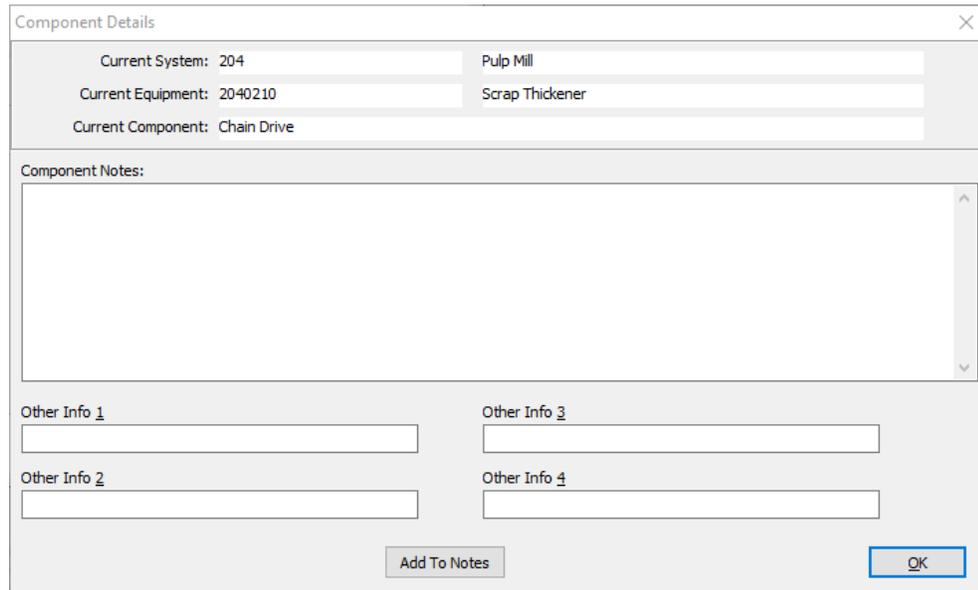


The notes window will now display the added note information with the date and name of the person who added the note.

## ii. Components Notes (LI5-2214)

Full rights or Admin users can view and edit Component Notes normally. Now partial rights users can be given permission to add to notes (Menu option: Utilities ->Password Manager). Notes may be

added by clicking on the Notes button  from the Component tab of Equipment Manager, then selecting the “Add to Notes” button from the notes form:



Component Details

Current System: 204      Pulp Mill

Current Equipment: 2040210      Scrap Thickener

Current Component: Chain Drive

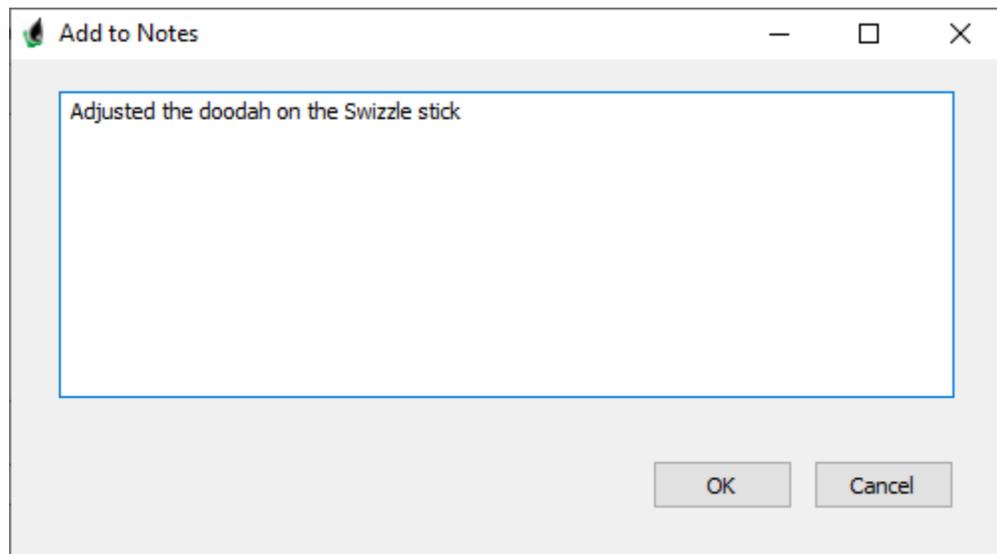
Component Notes:

Other Info 1      Other Info 3

Other Info 2      Other Info 4

Add To Notes      OK

And they will see the Add to Notes window. Then simply fill in the information they want to add to the note.



Add to Notes

Adjusted the doodah on the Swizzle stick

OK      Cancel

And click the OK button.

Component Details ✕

Current System: 204	Pulp Mill
Current Equipment: 2040210	Scrap Thickener
Current Component: Chain Drive	

Component Notes:

5/14/2020 12:25:31 PM additional notes added by Tom Swanson  
Flushed the reservoir and refilled with EP 150

Other Info 1

Other Info 2

Other Info 3

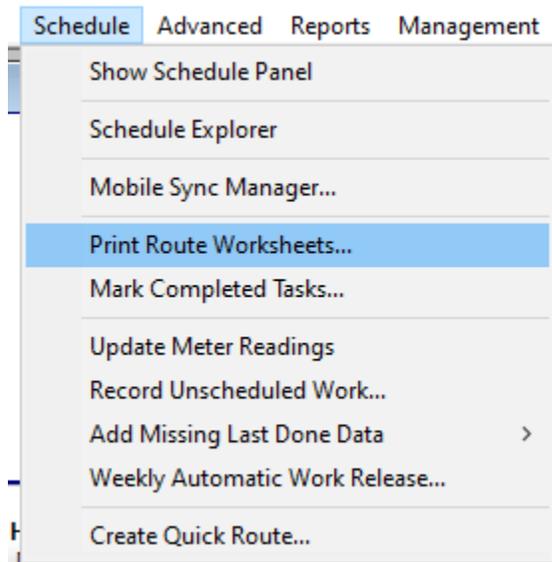
Other Info 4

The notes window will now display the added note information with the date and name of the person who added the note.

## II. Reports

### i. Added the option to include the new Component Fields into the Schedule Print Out. (LI5-2213 & LI5-2212)

1. Click on the Schedule -> Print Route Worksheet menu



2. Select the Routes you would like to print
3. Select which additional fields you would like to include in the report

Route Worksheet Print Options:

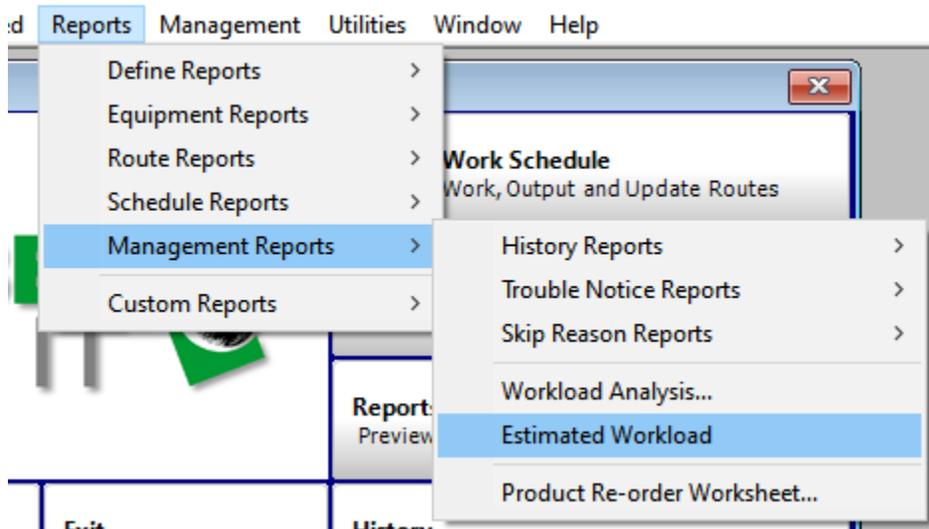
<input type="checkbox"/> Include Tag / Alt ID	<input type="checkbox"/> Include Manufacturer	<input type="checkbox"/> Equipment Attachments	<input checked="" type="checkbox"/> Summarize Procedures
<input type="checkbox"/> Include Functional / Other	<input type="checkbox"/> Include Equipment Notes	<input type="checkbox"/> Component Attachments	<input type="checkbox"/> Include Task Extra Fields
<input type="checkbox"/> Include Lockout Data	<input type="checkbox"/> Include Component Notes	<input type="checkbox"/> Procedure Attachments	

4. Click the Print or Preview button.

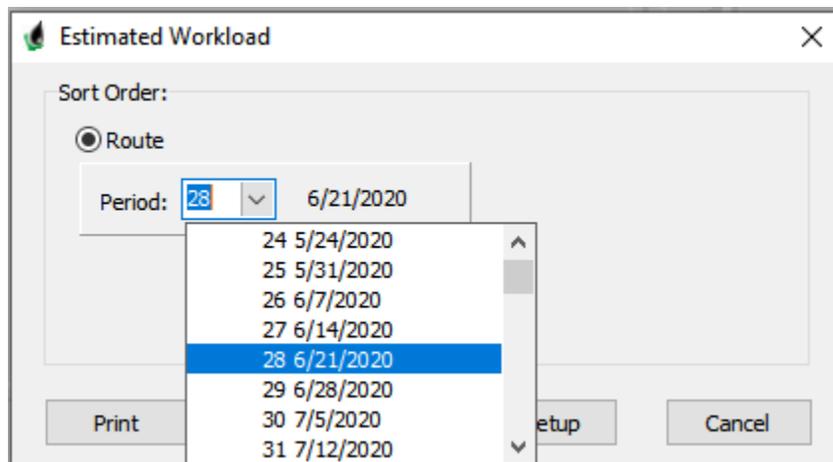
Seq	Complete	Component	Qty	Capacity	Pnts	Method	Product
<b>204 -- Pulp Mill</b>							
<b>2040170 -- Scrap Transfer Screw Conveyor #1 South End, First Floor</b>							
<b>Electric Motor Bearing</b>							
Asset ID: 1000008789 Tag Nbr: 453-dd-555-3d34de							
Functional: 45821-111-med-wed-no Manufacturer: Johnson Corporation Model #: 4512-458723-11							
1	<input type="checkbox"/>	Regrease	6 Months	5/22/2020			5 Minutes
<b>Reduction Gear Case</b>							
Asset ID: Tag Nbr: Manufacturer: Model #:							
2	<input type="checkbox"/>	Top Off	1 Week	5/22/2020			5 Minutes
<b>Change</b>							
3	<input type="checkbox"/>	Change	1 Year	5/23/2020	Requires Shutdown	495 Periods Past Due	30 Minutes
<b>Procedure 1: Small Reducer Change Proc</b>							
<b>Shaft Bearings</b>							
Asset ID: Tag Nbr: Manufacturer: Model #:							
4	<input type="checkbox"/>	Regrease	2 Weeks	5/22/2020			5 Minutes
<b>2040210 -- Scrap Thickener South End, First Floor</b>							
<b>Chain Drive: Enclosed</b>							
Asset ID: Tag Nbr: Manufacturer: Model #:							
5	<input type="checkbox"/>	Top Off	1 Week	5/22/2020			5 Minutes
<b>Coupling</b>							
Asset ID: Tag Nbr: Manufacturer: Model #:							
6	<input type="checkbox"/>	Repack	6 Months	5/22/2020	Requires Shutdown		20 Minutes
Pulp Machine			2			Report Date: 5/22/2020	

- ii. Added a new report to the Management menu.(LI-2215)  
This new report will estimate the number of tasks and duration for a period in the future. It assumes all tasks are completed when they are due. It will show the number of tasks and total duration for each route that will for the selected period.

- 1) Go to Menu option: Reports -> Management Reports -> Estimated Work Load



- 2) Select the Period you wish to report on

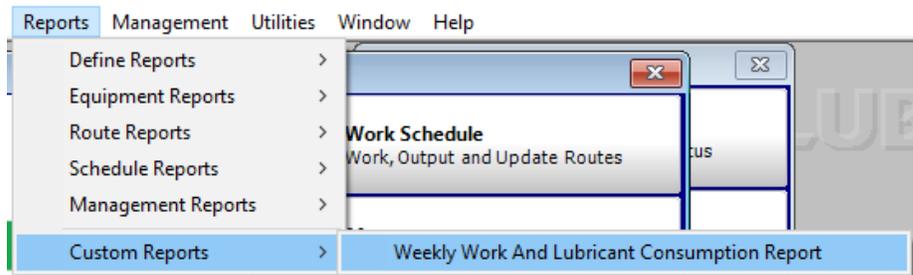


3) Click the Print or Preview button

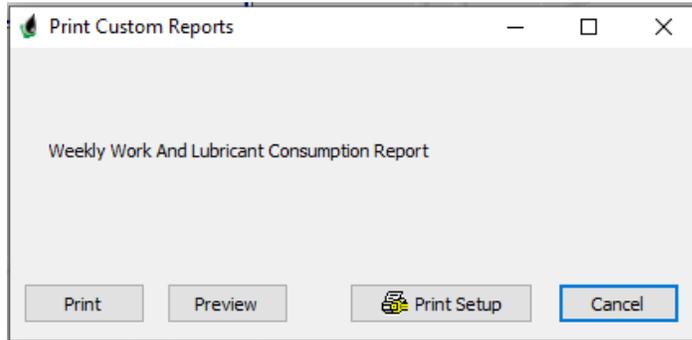
Route		Description	Assigned Staff	# Tasks	Duration
28	06/21/2020	06/27/2020			
	Default	Default Route		7	0:50
	NORTH 1	North End #1 (Main)	Steve Roberst	31	2:35
	NORTH 2	North End #2 (Grease)	Steve Roberst	11	0:55
	PULP	Pulp Machine	Steve Roberst	53	4:30
	ROLL	Rolling Stock	Andrew Petrasky	3	0:15
	SOUTH	South End	Andrew Petrasky	34	2:50

iii. Added a new report to the Custom Reports menu (LI-2217)  
 This new report will summaries the Completion results for the last week as well as a year to date completion result. It will also list any trouble log entries that were created last week. Finally it will so Last week’s consumption as was as year to date consumption

1. Go to Menu option Custom Reports -> Weekly Work and Lubricant Consumption Report



2. Select Print or Preview button



**Section 1: Completion KPIs**

System	Last Weeks Results						Year To Date					
	# Due	# Done	% Done	# Past	% Past	# Skip	# Due	# Done	% Done	# Past	% Past	# Skip
<b>204 : Pulp Mill</b>												
Default Route	1	1	100	0	0	0	3	3	100	0	0	0
Oil Sampling	13	0	0	13	100	0	39	0	0	39	100	0
Oil Sampling--							63	0	0	63	100	0
Pulp Machine	73	73	100	0	0	0	205	73	35	132	64	0
Pulp Machine--							285	7	2	278	97	0

**Section 2: Trouble Log Entries**

Number	Name	Component	Trouble Type	Trouble Text
2040170	Scrap Transfer Screw Conveyor #1	Electric Motor Bearing	Fluid Leak - Serious	Losing about 1 gallon an hour
2750105	HYPM Rake Motor		Burning Smell	Bad smell coming from the motor

Section 3: Consumption KPIs

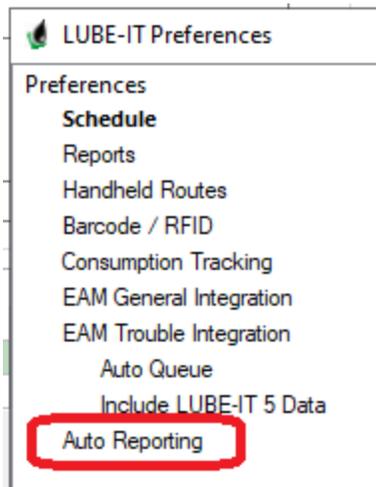
LUBE-IT™		LUBE-IT Results at a glance For All Systems			HP Inc. Auburn, WA		
Consumption KPIs							
		Year To Date			Last Weeks Results		
Product Name	Application UOM	Consumption	Unit Cost	Ext Cost	Consumption	Unit Cost	Ext Cost
Hydraulic Oil AW 32	Gallons	11.60	5.34	61.94	11.60	5.34	61.94
Hydraulic Oil AW 46	Gallons	4.80	6.50	31.20	4.80	6.50	31.20
Hydraulic Oil AW 68	Gallons	12.50	5.78	72.25	12.50	5.78	72.25
Industrial Oil EP 150	Gallons	12.50	12.55	156.88	12.50	12.55	156.88
Hi-Temp SHC-32 Grease	Grams	3.50	3.25	11.38	3.50	3.25	11.38

### III. Preferences

#### i. Auto Reports feature (LI5-2208)

The Auto Reports feature allows LUBE-IT to automatically email PDF files to management. You may send emails to as many email addresses as you wish. To set up Auto Reports:

- 1) Go to Menu option: LUBE-IT -> Preferences
- 2) Click on Auto Reporting

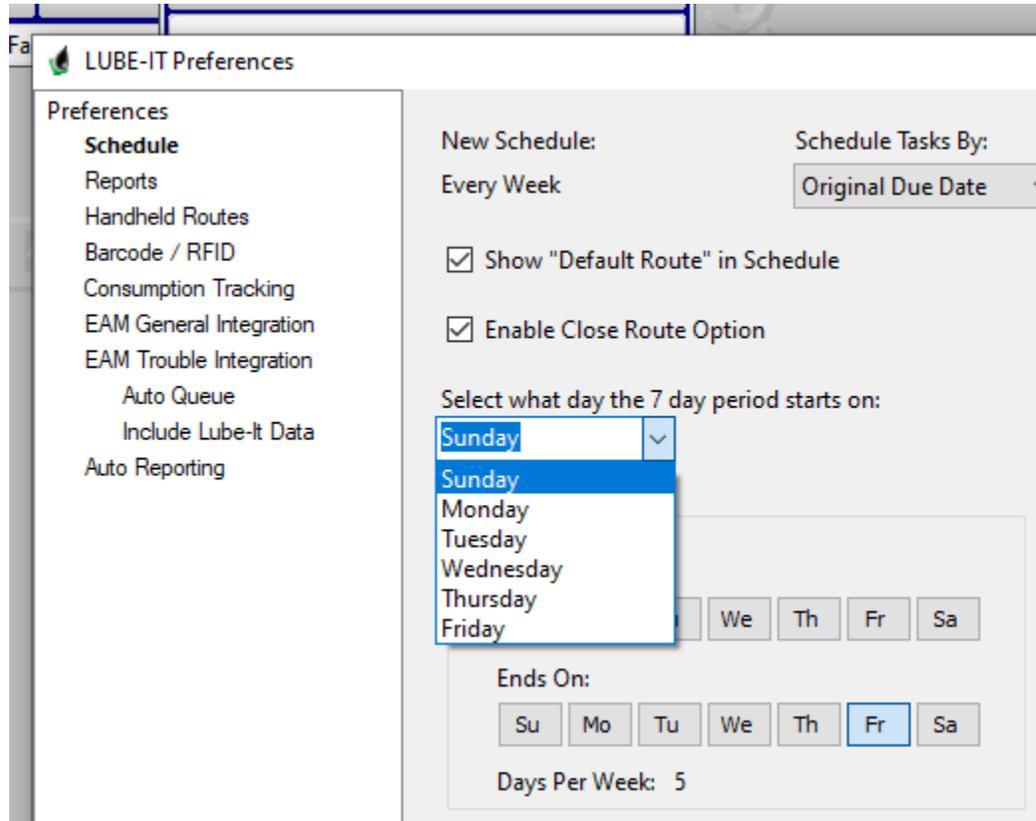


- 3) Check Enable Auto Reporting
- 4) Edit the subject line and body of the email that will be sent
- 5) Click on the Reports Tab. This shows the default Dashboard report that will be sent
- 6) Click on the Email Server tab

- 7) Enter the SMTP address of your email server (Contact your IT department for this information)
- 8) Enter the Port that your SMTP server uses (Contact your IT department for this information)
- 9) Enter the “User Name” and “Password” to connect to the SMTP server. This will be the user that the emails will be sent from
- 10) Click on the Recipients Tab
- 11) Enter the Name and Email Address of the people that will receive the Email
- 12) Click OK

After Auto Reporting has been enabled and after you build your next schedule, LUBE-IT will automatically send a PDF version of the Dashboard report to the entered recipients.

- ii. **Change the starting day for your 7 day work period (LI5-1689)**  
You now have the option to change when your work period starts. Pick a day by selecting a value from the dropdown box



You still have the option to set your work week duration. For example, if you select to start your work period on Wednesday, you can then select that you only want LUBE-IT to schedule work from Thursday through Monday. Any tasks that come due on Wednesday or Tuesday will be adjusted to fall within the work week of Thursday through Monday.

## IV. Security

### i. Partial Rights user can be given permission to build the new schedule (LI5-2211)

We added the option to allow partial rights users to build a new schedule. Previously, users needed to be either full rights users or admin users.

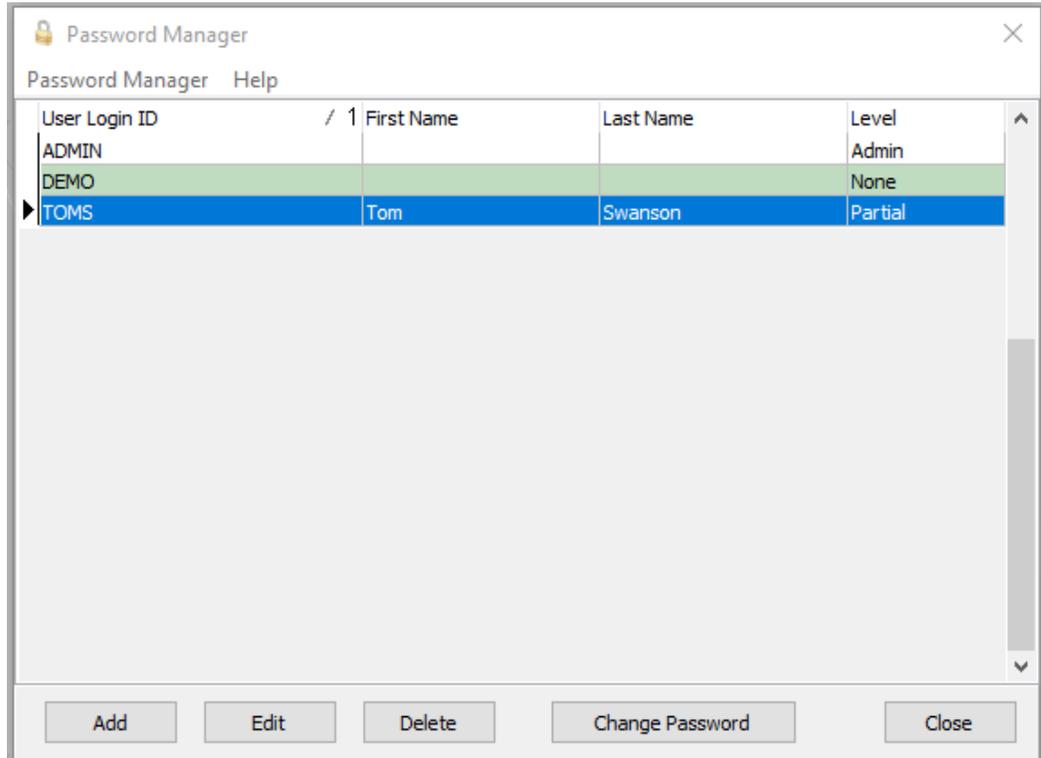
- 1) Click on Utilities -> Password Management
- 2)



The image shows a dialog box with a dark blue background and yellow text. The title is "Please verify your User Name and Password". Inside the dialog, there are two input fields: "Enter User Name:" and "Enter Password:". Below the input fields are two buttons: "OK" and "Cancel".

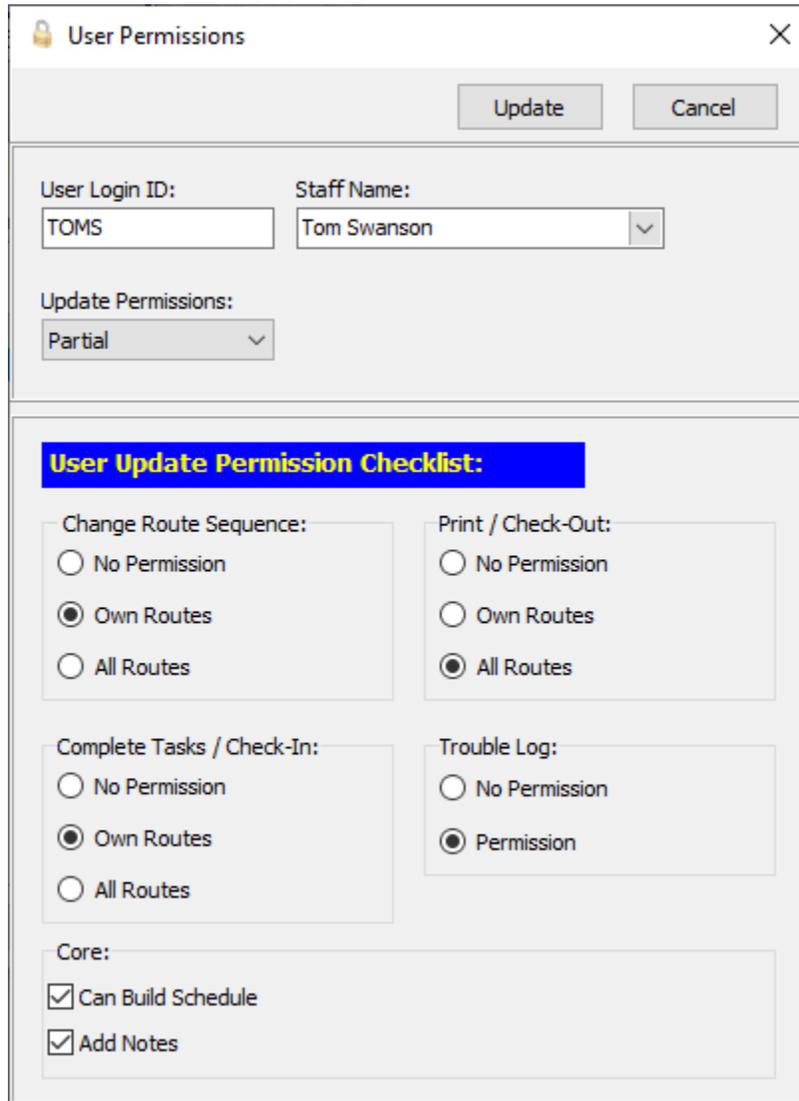
Enter a "User Name" and "Password" for an ADMIN user in order to make these changes.

3) Select the partial rights user you want to edit



Then click "Edit" button

4)



**User Permissions**

Update Cancel

User Login ID: TOMS Staff Name: Tom Swanson

Update Permissions: Partial

**User Update Permission Checklist:**

Change Route Sequence:  
 No Permission  
 Own Routes  
 All Routes

Print / Check-Out:  
 No Permission  
 Own Routes  
 All Routes

Complete Tasks / Check-In:  
 No Permission  
 Own Routes  
 All Routes

Trouble Log:  
 No Permission  
 Permission

Core:  
 Can Build Schedule  
 Add Notes

Check the “Can Build Schedule” check box

5) Click Update button.

ii. **Partial rights users can be allowed to add to Equipment Manager notes (LI5-2214)**

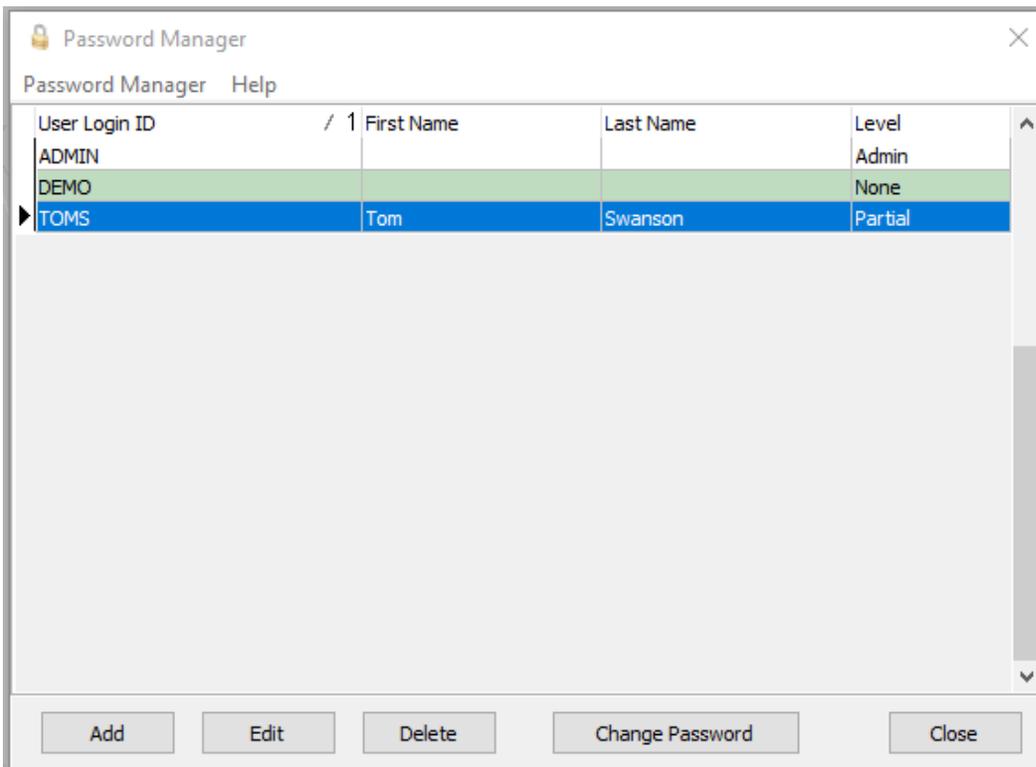
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- 1) Click on Utilities -> Password Management
- 2)



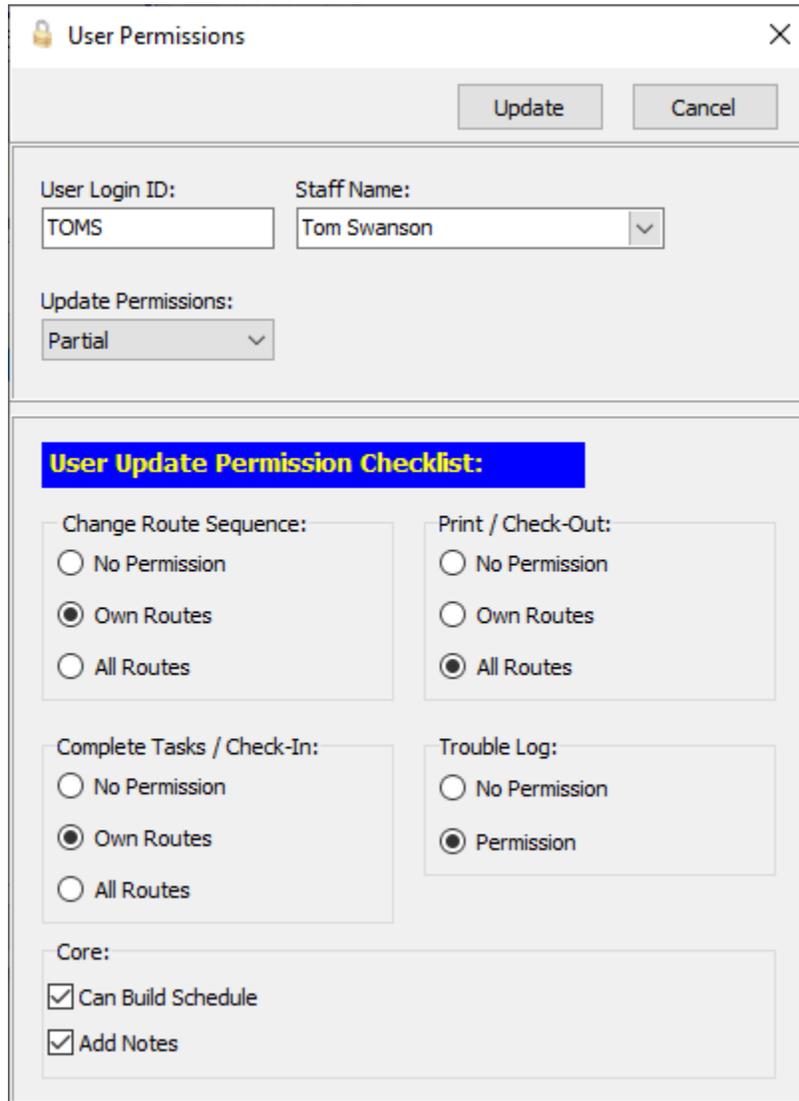
Enter a “User Name” and “Password” for an ADMIN user to make these changes.

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Then click "Edit" button

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User Permissions

Update Cancel

User Login ID: TOMS Staff Name: Tom Swanson

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**User Update Permission Checklist:**

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Print / Check-Out:  
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 All Routes

Complete Tasks / Check-In:  
 No Permission  
 Own Routes  
 All Routes

Trouble Log:  
 No Permission  
 Permission

Core:  
 Can Build Schedule  
 Add Notes

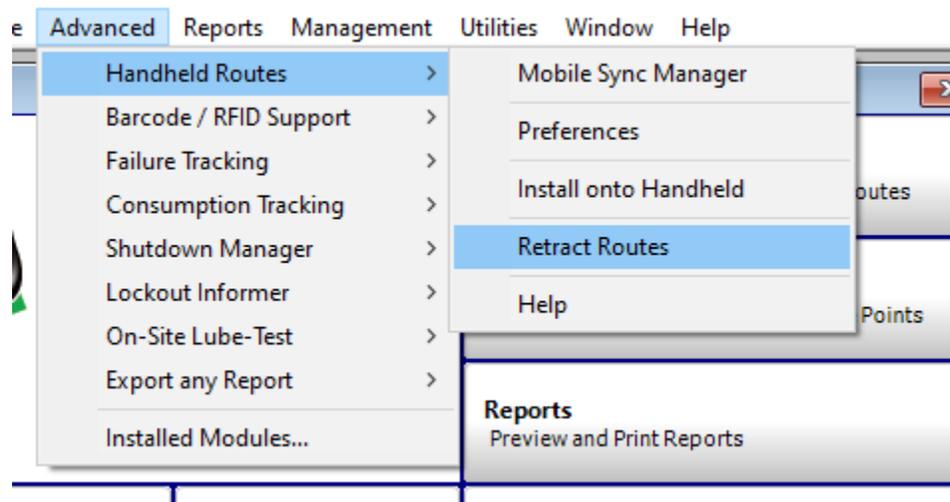
Check the “Add Notes” check box

5) Click Update button.

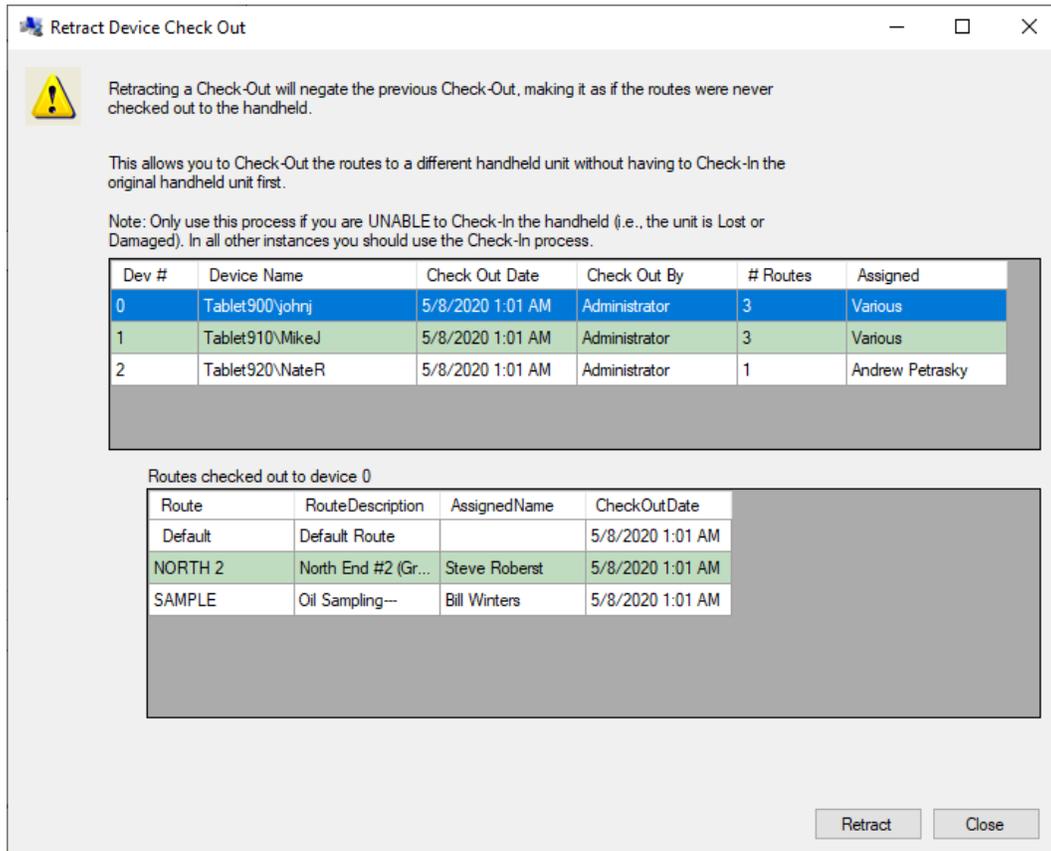
## V. Mobile Routes

### i. Retract Routes without Windows Mobile Device Center installed (LI4-2210)

A new menu option has been added to the Advanced -> Handheld Routes menu named Retract Routes



This launches the window below “Retract Device Checkout”



This window shows two grids. The top grid shows a list of all devices that have routes checked out. The top grid also shows the device name (including the username), the date and time it was checked out and how many routes there are. When you select a device in the top grid, the bottom grid reveals a detailed list of the routes that are on the selected device.

To Retract a route:

- 1) Select the device from the first grid. The bottom grid will show the list of ALL routes that will be retracted.
- 2) Click the “Retract” button. All the routes on the selected device will be retracted. They can now be checked out to a different device.

## Bug Fixes

### VI. Automatic Work Release

- i. Fixed the issue where the automatic work release process wrote a Timestamp to the Last Done Date instead of just the Date value (LI5-2207)

This fixed the issue where users were unable to reorder tasks from within the Route Explorer.

### VII. Define Items

- i. Fixed the issue where an error message is displayed that does not properly explain why the error occurred. (LI5-2209)

The error was being raised when you tried to rename a “define item” to one that already existed. For example, if you have a route named “North” with a route description of “North End Route” and another route name “North 2” with a route description of “North Side Route”. You try to rename the “North 2” route to “North” and click the Save button. The old message was “...Must apply updates before Refresh”. With this fix you will now be presented with a message that “NORTH” already exists. The user is now presented with this proper message telling them that they cannot have duplicate define items.

### VIII. Reports

- i. Fix the Current workload report. (LI-2205)
- ii. Fixed issue with some reports displaying error 536 (LI-2216)

Some users were experiencing an error 536 when attempting to run certain report inside LUBE-IT.

This was due to the system using the incorrect version of the SQL Native Client. We updated the routine to make sure the current client was being used for all reports.

iii. **Fixed issue with System Catalog (LI-2218)**

When users tried to limit the report to a specific System, some systems did not show up in the list. Systems that had a blank system or system description were showing up in the list as a blank row.

IX. **Equipment Manager**

i. **Fixed issue where routes were re-sequenced when an equipment or component was deleted. (LI5-2139)**

When an equipment is deleted, all components and tasks belonging to it are also deleted. This will leave blanks in routes that had tasks that belonged to the equipment. A stored procedure is used to re-sequence the affected routes. For some customers the routes were getting sequenced incorrectly. The procedure has been updated to ensure the route sequences are set properly.

X. **Starting LUBE-IT**

i. **Fixed an erroneous message which stated that, upon start-up of LUBE-IT, a schedule was being built even though there was no schedule being built. (LI5-1675)**

This was caused by certain flags not getting set properly.