EMIR

Electro-Mechanical Information Resource
Modules & Extensions

E-Commerce

Web-CALS

Stock

Purchasing

Quoting

Finance

Asset Management

Winding Details Database

Basic

Time & Attendance

Web Job Tracker

EMIR^{PDA}

Labour Scheduling

CRM

EMIR
Electro-Mechanical Information Resource

Contents

Welcome to the World of EMIR – Electro-Mechanical Information Resource. EMIR is the market leading business software solution for the Electro-Mechanical industry. This brochure explains the functionality behind the software and the methodology we use to deliver savings in time and money through integrated processing.

Section 1 – EMIR modules

You'll learn how the core components of EMIR Standard and Professional interact to deliver key business management capabilities.

Section 2 – EMIR extensions

You'll be introduced to software that adds unlimited user functionality to the core system such as the internet, mobile devices or by simply delivering EMIR to even more parts of your business.

Section 3 – EMIR and You

This section is dedicated to the process, the technology and how to make a successful transition to an integrated, tailored solution for your business.

1. EMIR Modules

2. EMIR Extensions

3. EMIR and You!

EMIR
Electro-Mechanical Information Resource

Basic Module

Basic

The EMIR Basic module allows the user to create jobs; record costs along with details of work carried out; allows the user to process the job through to producing delivery notes and invoices, and keeps track of o/s debtors and creditors.

The Basic module has many useful features to help deliver real benefits to your business:

Each 'job' is booked in against the appropriate customer, who has a unique account code for identification purposes. Each job is given its own 'Job Number' for traceability purposes, helping users to conform to ISO9000. The system holds comprehensive details against each job, and extra fields can be added to suit individual requirements. Standard details held include:-

- **Make and Type/Description of machine**
- **Client Details, Contact Person and Order Info**
- **Date Due, Job Priority and Department**
- **Faceplate details of Pumps, Motors, etc.**
- **Price and 'Recommended Charge' fields**
- **Photo's, Files, Notes and additional comments**
- **Details of Materials, Labour and Work Done**
- **Invoice and Delivery document details**

EMIR produces a job card for each job raised. Job cards, like Delivery Notes and Invoices and all other EMIR stationery, are designed to fit A4 blank or company headed paper as standard. Your branding can be loaded into these documents.

EMIR allows the user to record all labour and material costs and charges, and also allows the user to enter the details of work that have been carried out against the job which is then listed on the invoice to justify your pricing.

There is a comprehensive enquiry and reporting suite available to show a complete 'Job Costing' picture. This ensures that you are charging the correct profitable amount for the work carried out and allowing fast retrieval of the required information to help you run your business effectively.

Labour costs can be recorded 'live' [with the use of our **Time & Attendance** extension – see pages 16 & 17] or via a 'time sheet' entry method which is most commonly used. Both methods will automatically update the labour costs and charges against the job and allow the recording of non-productive time, such as Sickness or Holidays to measure labour productivity.

Details of materials used are also recorded against the job. Entering costs & quantities used, based on a default margin or on a discount from RRP per client [in the case of stock items], means that EMIR can automatically calculate a "Recommended Charge" for you.

The service operations that have been performed on a job are then recorded via free text entry or more quickly via the use of Work Done Codes (WDC). These are common phrases describing routine work that is carried out (e.g. A Strip Down and Test). Each item of 'Work Done' that is added to the job can then be printed on the invoice for the customers' information and to help justify the price charged.

- EMIR Standard allows each customer order to be produced as a 'Job' with a unique identifier for traceability. EMIR Professional further allows for 4 distinct job types covering Repair/Service, Sales, Stock Build/Manufacture and Hire.

- You can store photos against the job, which are ideal for showing evidence of damage or to ensure that the condition which the unit arrived/left is recorded. You can also link Microsoft Word™, Excel™ or any other kind of file directly to the job. Many users also scan in completed [handwritten] job cards so they have an easy way of finding the original 'handwritten' information.

- The Basic module will allow you to progress a job from 'Work in Progress' through to "Invoiced" producing all the necessary paperwork along the way. Such invoices and delivery notes can be customised with your logo and can optionally be emailed directly out of EMIR via use of your email package. This saves time, printing and postage and provides a full colour copy!

- EMIR will ensure you know what the job has cost you, and what you should charge via EMIR's job costing information and labour and materials **budget** setting capability. Never knowingly undersell your work again!

- EMIR helps to capture all material costs against the job, and you can also add EMIR's **Stock and Purchasing modules** if you want to properly track stock movements and the raising and receipt of purchase order goods.

- EMIR Professional further allows for required material planning [BOMs] and the option for multiple delivery notes and invoices for sales order processing meaning that you can part deliver and invoice an order based on available stock levels [if used along with the **Stock module**].

- Even if your typing skills are limited, you can produce delivery notes and invoices quickly and simply. Invoice text can be loaded from Work Done Codes that you can set up and turn into Groups, so that in one 'click', you can add many lines of description onto an invoice.

- There are many enquiries that allow you to find a job via job number, serial, customer, delivery note, invoice, customer ref, manufacturer and even the technical characteristics of motors, pumps and gearboxes! In short, you will never have to search through paper lists again!

- Extensive enquiries and reporting allow you to find out all you need to know about your job costing profitability, customer profitability, revenue produced, your active order-book, and much more! This reporting will ensure you can stay on top of your business and control it better, and EMIR's enquiries can be exported to Excel™ with one simple right-click of your mouse!
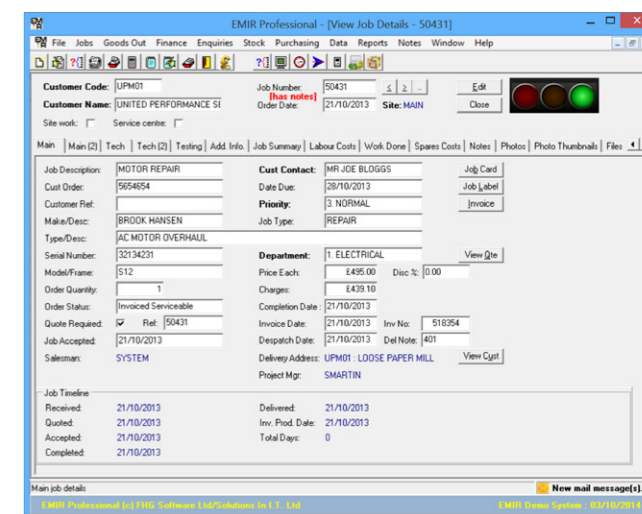
> "Following the implementation of EMIR the day to day processing of repairs has improved dramatically. It's simple, easy to use and, along with the support provided, it's proved to be exceptional value for money. I have no hesitation recommending EMIR software and their support package."
>
> *Mr Greg Russell, Managing Director,*
> *Fazakerley Rewinds, Merseyside*

> "EMIR has made our job management costing process, delivery and invoicing much quicker, simpler and far more traceable."
>
> *Mr David Breen, General Manager,*
> *Bandon Rewinds, Eire*

EMIR
Electro-Mechanical Information Resource
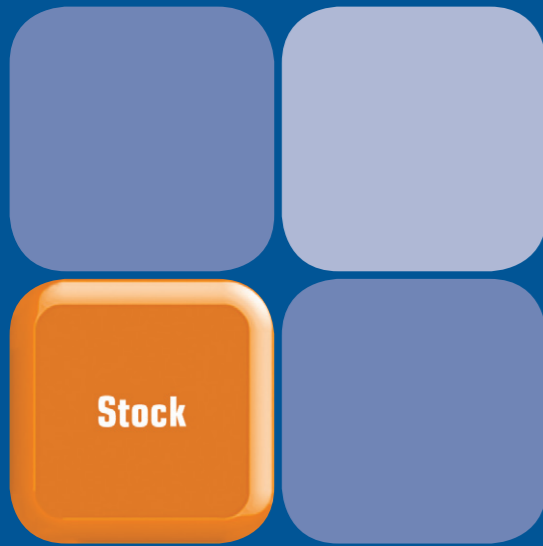
Stock

The Stock module is used for the complete control of all stock items. Each stock part has its own stock 'profile'. The profile details the number of items in stock, the amount recommended for purchase, those actually on order, any shortages of the part required for jobs, and the number of that part that are already allocated to jobs.

The EMIR Stock module has many useful features to help deliver real benefits to your business:

The Stock module interfaces into the Job Costing section of the Basic module to provide known part and pricing information, such that when a stock part is recorded as used against a job, the stock levels are decremented accordingly. This ensures that your stock system always shows the true picture of your stock levels and value.

Information stored against stock parts includes a 20 character part number [50 characters with Professional], a 50 character description, a cost price, the RRP and a lead-time for supply. You can also track by serial number, record stock as 'consignment stock' and store 'price break' information. EMIR can also store extensive descriptions/notes against each part number that copies forward onto key documents.

EMIR can be used to analyse usage of all stock parts and set minimum and maximum stock levels with required re-order quantities. These can be over-ridden by the user's own manual entry. EMIR can also produce purchase recommendations, based on these minimum and maximum levels, to ensure that stock holdings are kept at desired levels. If used in conjunction with the Purchasing module, the user can accept any of the recommendations required and EMIR will automatically produce purchase orders to the required suppliers.

> " Within months of starting with EMIR, the benefits became obvious and the longer you use it the more those benefits became apparent, from prompt handling of enquiries to stock control – I couldn't imagine now working without it. "
>
> *Mr Barry Palmer, Sales Manager,*
> *Kirkby-Lindsey, Humberside*

> " It certainly took me a while to make the decision to purchase EMIR as I was wary about changing our system to completely computerised. Once the system was loaded up (...) we haven't looked back. I can't believe how much time it is saving us, I would say we have already seen a 50% time saving with our administration (...). The system is also helping us to manage our stock a lot easier as well. All in all I am absolutely delighted with the EMIR system and would have no fear in recommending it to any other business. "
>
> *Mr Charles Bellwood, Managing Director,*
> *Bellwood Rewinds, Tyne and Wear*

Each stock item can be purchased from multiple suppliers, by use of Supplier Parts. So for each part you can have many suppliers with each supplier calling the item by a different catalogue number [if required].

The EMIR Stock module will also allow you to set discount rates by customer, so items are sold at their agreed prices, and provides all the reports and enquiries you need to help manage your stock efficiently including stock valuation reporting, stock check reporting and details on top moving items. It will make sure you know the price of the key spares and products that you sell and ensure you can track how often they are used and where they are stocked.

In short, EMIR has everything you need to manage your stock efficiently and keep it accurate and up-to-date!

- EMIR will set min and max levels for stock items based on their usage, and alternatively allow you to set your own min and max levels and then use these levels to recommend purchases to ensure you don't run out of key stock items.

- EMIR will recommend items that are below minimum stock for order and allow you to raise Purchase Orders in seconds to ensure your stock is kept at the optimum level for your business. [Requires **Purchasing module** also].

- EMIR will allow you to track your key items by Serial Number ensuring you can always trace if a particular item is on the shelf or to find out which job it went out on and which customer it was sold to.

- There is the option to assign a stock part to a 'Stock Group' e.g. Copper Wire. This then allows all those parts in a stock group to have their price changed by a standard amount. E.g. To increase all the prices in the stock group by 10%.

- There is also the option to set discounts for each customer based on Stock Group, so that you can default the charges for materials sold to customers. E.g. you can assign a particular customer with 10% off the RRP for Bearings, and 5% off for Brook Motors, etc. Material costs are then charged to customers on a RRP less Discount basis, meaning that you don't have to spend time working out a price for a customer!

- EMIR Professional can help you to manage 3 variations of stock pricing: Standard Cost, Latest Cost and a Weighted Average cost.

- EMIR Professional will allow the import of Required Items and Bill of Materials with fast processing options to issue all items in stock, create all shortages or order all items that are required.

- You can issue stock directly to jobs via the use of barcode scanning in our "Stores Issues" option, which also allows you to record the issuing of PPE equipment to staff.
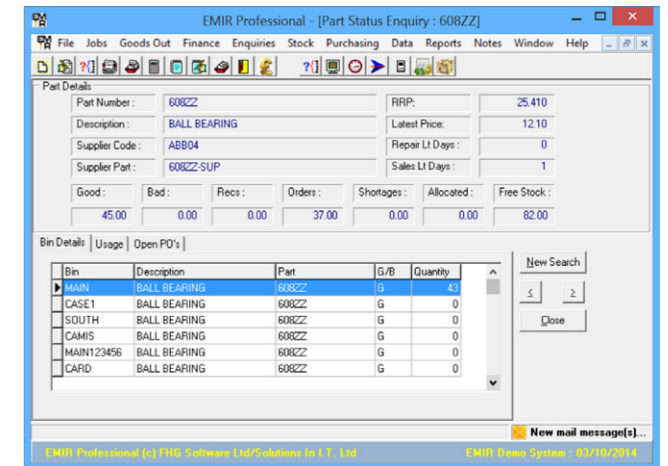
- There are also lots of Reports so you know exactly what is happening with your stock!
  - All stock transactions for a part or all parts over any date range.
  - Stock check report to show parts and their stock levels by bin location.
  - Report of top moving stock items.
  - Report of purchase recommendations, indicating which stock items now need purchasing because they have gone below their minimum stock level.

Our Professional version also lets you use "Master Suppliers", so you can buy the same parts list from more than one supplier, and much, much more!

EMIR
Electro-Mechanical Information Resource

Purchasing

The EMIR Purchasing module is the ideal way to track and perform all your purchasing activity, whether buying for stock or directly for an ongoing Job. It will ensure you know the status of your purchased items and track what is open, overdue, delivered or has been returned to the Supplier via its goods rejection system.

The Purchasing module has many useful features to help deliver real benefits to your business:

Purchase Orders can be raised for stock items in conjunction with the **Stock module** (which allows entry of known part numbers with known prices), miscellaneous items (free hand text entries), and can be purchased on 'General' orders or on "Direct" orders against Jobs. You can also combine the two in our Professional version to order for stock and various jobs on the same order.

The Purchase Order is created listing the items to be purchased, detailing part numbers and descriptions, quantity and pricing information. There is also the facility to set a delivery date for each item, so that the supplier's performance can be monitored against required delivery dates. Purchase Orders can be raised in the appropriate currency of the Supplier. The printed Purchase Order is designed to fit A4 blank or headed paper as standard.

When ordering stock items, all the details of the parts required are automatically entered on the purchase order. When the order is received, the stock level is automatically increased.

When ordering items directly for a job (whether stock or miscellaneous items), all the items ordered will immediately be recorded to the job (via an automatic entry in and out of stock), so no additional work is required for recording spares usage, ensuring that the job costing process has all the required data it needs. EMIR also has facility for recording extensive notes against each item ordered [text blocks], and allows carriage to be recorded separately [without the need to record it as an item on the order].

The Purchasing module has its own 'Goods In' functionality to receive the items ordered, and each delivery of goods received is uniquely logged with its own electronic Goods Received Note [GRN]. Goods can also be rejected through EMIR, and EMIR will produce a Rejection Note that is ideal to accompany the goods back to the supplier.

Purchase order numbers can also be 'reserved' for use at a later time. The order can subsequently be amended to enter the actual items required, which is ideal for site engineers placing orders on the move.

EMIR allows you to set various limits on PO creation so that PO's above that value will require approval before they can be printed or emailed. Such approval is flagged internally by EMIR to the appropriate users and subsequently the PO raiser is informed when the PO has been approved – all via EMIR's internal email system!

> **❝** We have seen EMIR as an important part of the growth we have seen as a company and it continues to provide all the information and time-saving features that we need to help grow the business further without the need for more administration staff. **❞**
>
> *Mr Chris Carrick, Managing Director,*
> *ADC Electrical, Tyne and Wear*

- Viewing details of all parts purchased from a specific supplier, or all suppliers so you can trace where you buy things from and for how much.

- Viewing outstanding/overdue purchase orders with the option to export to Excel™ to email directly to the supplier to chase up your orders in a flash.

- List Goods Received within a date range, along with values by supplier.

- Distinguish between normal and "urgent" Purchase Orders with an enquiry to allow focus on urgent items.

- Reports on the value of committed spend on Purchase Orders raised by Account Code or by Supplier. The Account Codes can be set by the user, e.g. Engineering, Administration, etc. to help control budgetary spend.

- EMIR also allows you to set up an order 'approval' process, so that only once a specified 'approver' has authorised the order, the PO can be printed or emailed from EMIR. You can also set user limits specifying what value they can order without approval being necessary, and set minimum order values by supplier.

- Track the purchase of hire items with from and to dates and EMIR will remind you when items need to be returned.

- You can add unlimited notes that will print after the item on the PO, ensuring that the description of what is being purchased can be as detailed as you need it to be.

- Direct delivery to a customer's site is easily arranged by simply ticking a box to change the delivery address from your own premises to the site for the job [job related orders only].

- You can set unique delivery due dates against each item, to ensure that EMIR can inform you of all items that are overdue or haven't been received yet, allowing you to stay on top of your orders.

- Returning faulty or unwanted goods is simple with the Rejection process that will automatically produce all the paperwork you need to return the goods, reduce stock accordingly, and keep track of any vendor performance issues.

- Part number 'fuzzy match' is used to find more details about a part, such as suppliers of the item, full part number or description. By entering a keyword connected to the part, all items containing the keyword are listed for viewing.

EMIR
Electro-Mechanical Information Resource
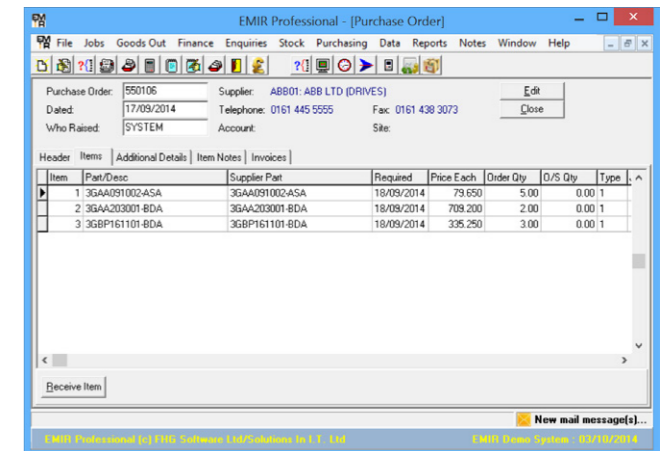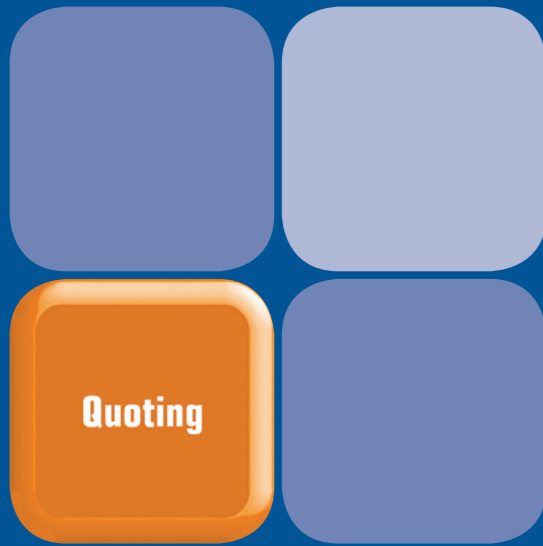
Quoting

The Quoting module allows users to create quotes for Repair, Sales, Hire and Service work. EMIR provides all the tracking and traceability you need to know.

The Quoting module has many useful features to help deliver real benefits to your business:

The Quoting Process

Quotes can be raised from EMIR either from a job [in the case of repair/service] or by just creating a quote [for a sales order]. EMIR can then tell you:

- Which jobs need to be quoted?
- Which quotes are outstanding and need to be followed up by date?
- Which quotes have been successful?
- Which quotes have been rejected?

Job Status

For those created from a job, EMIR will change the status of the job from "Work In Progress" to "Evaluation", so that the user can tell from the status that the job has an open quote against it that the customer is evaluating.

Types of Quote

There are two choices when it comes to creating quotes in our EMIR Standard system:

1) You can choose to use the EMIR quote layout which allows you to combine the customer information with a description of the work to be carried out and photographs of the item concerned. EMIR allows you two different layouts, including a BASEEFA style layout which shows more technical information about the item being repaired. You can optionally create a new quote from an old one, and you can also add a Quote Acceptance page to your quote for the customer to simply sign and send back to proceed with the quoted work.

You can also store notes against the quote so any users can see how the quote has progressed. EMIR also allows you to plan the materials and labour element of the quote which can optionally be printed in detail on the quote – should the customer require it. EMIR will also allow you to order the necessary materials from the accepted quote via linking to our **Purchasing module**.

2) You can also optionally add the 'File-based' quoting system in which EMIR allows you to use Microsoft Word™ or Excel™ to create the quote to your own layout, but key information about the quote is stored within EMIR. The document is also stored within the EMIR system so everyone can find it and view it [you don't need to worry about where it is saved!]. With EMIR Professional, you can also use 'Merge' technology to combine your EMIR layout with Microsoft Word™ for ultimate flexibility in Quoting!

EMIR Professional

In addition to the two methods above EMIR Professional also adds two other layouts for you to use:

1. **Sales Quote.** A template format to allow selection of the items for sale along with key contact, terms and other relevant information.

2. **Hire Quote.** This allows the user to select items for hire from a hire fleet and quote prices based on the period of hire for each item.

Certificate of Conformance

EMIR also allows you to produce a certificate of conformance, similar to the BASEEFA style layout, so that you can provide a suitable certificate of conformity for any quoted item.

" We have grown the business very quickly and EMIR has enabled us to keep track of all our jobs, purchases, stock, quotes, and it has also given us complete financial management. It's an excellent system and I have no hesitation in recommending it to others. "

*Mr Malcolm Martin, Managing Director, Stardelta, Lincolnshire*

- EMIR ensures you can keep track of all quoting work and as all the information is stored within EMIR records, you don't have to go hunting for paper information ever again!

- All quotes, that are produced using EMIR standard layouts, will look the 'same' so providing a consistent and professional image for your business.

- EMIR allows customisation of the layouts with your logos so that your branding is shown, and you can also directly email the Quotes from within EMIR via use of your email package such as Microsoft Outlook™ or Outlook Express™. Quotes are produced in full colour PDF's which are ideal for emailing, and save the need for printing and/or faxing.

- EMIR allows you to plan the materials and labour for any quote and these can optionally be printed if the customer requires a breakdown of the costs involved. These costs are stored against the quote and can be transferred and compared against the job to see how you have fared compared to the planned price. This is ideal for seeing how good your predicted costs are against the actual and so learning where costs have been underestimated.

- EMIR allows you to include photos on the quote, that print two across the page, to show damage or other visual information that you wish to help demonstrate the work/cost involved. A picture says a thousand words after all!

- EMIR makes it easy for your customers to place an order by adding a Quote Acceptance page to your quote that your customer can simply sign to proceed with the work quoted. Make it easy for the customer, and you have a better chance of getting their business!

- Do you need to show "EX" type repair information in your quote and produce a Certificate of Conformity when the work is done? No problem, EMIR's BASEEFA style quotes do all this for you and make it quick and easy for you!

- Our File-based quoting option allows you to make use of Microsoft Word™ or Excel™ to produce your quotes should you need to provide lots of information and options within your quote. The quote is still stored within EMIR so all staff can still find the quotes quickly and easily!

- Take control of your quoting process by ensuring you know what quotes need to be produced and which quotes need to be chased. Keep track of how a quote is progressing by reviewing notes, and don't miss out on business ever again!
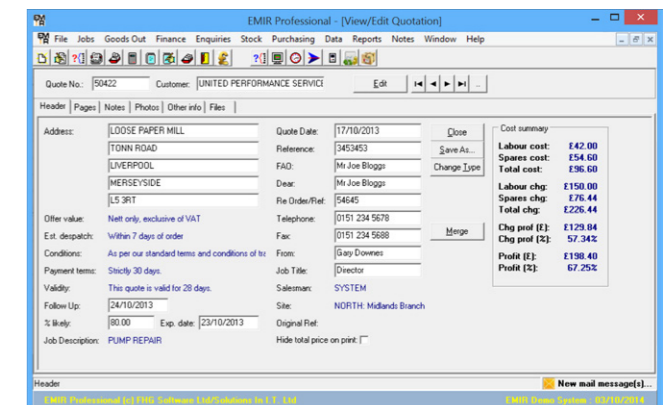
" EMIR is an ideal tool for us because it is already perfectly suited to the pump and motor industry. We have been able to use it with minimal customisation and it is quick to learn and logical to use. I would personally recommend EMIR as an excellent solution for other Electro-Mechanical businesses. "

Ms Annette Boulter, Commercial Manager, Hidrostal, Berkshire

EMIR
Electro-Mechanical Information Resource
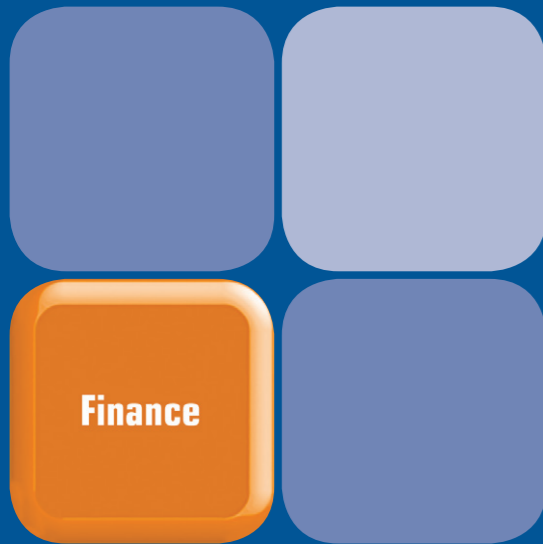
Finance

The Finance module adds the full Nominal Ledger accounts to the Sales and Purchase Ledger functionality that is available within the Basic system to ensure your financial information complies with all audit requirements.

The EMIR Finance module has many useful features to help deliver real benefits to your business:

Sales Ledger

The Sales Ledger is available within the Basic system and provides the essential functionality you need to control your debtors. This module includes Invoice and Credit Note production, receipt of Payments and Deposits, Aged Debtor Analysis, Statements and comprehensive reporting facilities.

Purchase Ledger

Includes functionality to record the Receipt, Approval and Payment of Invoices; Holding invoices for non-payment and printing of Suggested Payments and O/S Creditors reports.

Nominal Ledger (NL) & VAT

The NL provides a Full Trial Balance, instant Profit and Loss, Balance Sheet and Fixed Asset Control. The reports available include the VAT Return option which shows you all the totals and evidence you need to complete a VAT return.

Cash Book and Bank Reconciliation

Automatically builds entries into a 'Cash Book' from transactions that are made during the normal running of accounts, such as Purchase Ledger payments, Sales Ledger payments and Journal entries. A Bank Reconciliation option allows you to 'tick off' entries that appear on your statements to ensure that you haven't missed any transactions.

Open Postings

The Nominal Ledger allows the user to continue processing transactions in advance of the current financial month up to the current date. E.g. If you are in financial month of September, but it is the calendar month of October you can still do October transactions without affecting the month of September.

Financial Reporting

All reports can be viewed or printed at any time of the month providing a complete audit trail:

- **Trial Balance, full and summary**
- **Profit and Loss reporting with schedule**
- **Balance Sheet**
- **Journal entries, showing all transactions**
- **Cash Book and Bank Reconciliation reports**
- **Sales and Purchase 'Day Books'**
- **Sales and Purchase Credit Notes**
- **Sales and Purchase Ledger reports**
- **VAT Return reporting**
- **Fixed Asset reporting**
- **Production of debt chasing letters**
- **Multiple cash book setup available**
- **P&L analysis versus budget**
- **Export of BACS payments into CSV file**
- **Intrastat Purchase reporting [Pro only]**
- **Cash Flow forecasting [Pro only]**
- **Extended options for multi-site setup [Pro only]**

> " It's so easy for everyone to use, all our records are now readily accessible within seconds. (No more searching for hours for that lost piece of paperwork). The Finance system holds so much information that our audit went extremely smoothly and the ability to tailor the system to our individual needs for a reasonable cost is brilliant. "
>
> *Ms Christine Swan, Finance Director,*
> *Brownings Electric Co Ltd, London*

- Track your sales right through from Job creation, via Invoice Production to Payment collection with detailed analysis of Debtor values at all times.

- The Finance module provides an auto-approval analysis, by checking the details of the Purchase Invoice against the original Purchase Order placed via the Purchasing module of EMIR. EMIR will check that the goods have been received and that the value of the purchase order matches the value of the entered Purchase Invoice. If all is well, then EMIR will approve the Invoice and allow the user to select the Nominal Ledger codes applicable for the spend, otherwise it informs the user of the reason why the invoice can't be approved, whilst still allowing the user to log the invoice for approval later.

- A completely 'live' picture of your financial situation. At any time you can see the Profit and Loss Trading Account for the current month, quarter, and year-to-date. Look instantly at the current Balance Sheet or current Bank or VAT positions.

- This is a completely integrated solution, there is no need to enter any piece of financial information more than once, and EMIR will cross-check any information to make sure that you are getting the most intelligence from your data entry.

- VAT returns are a 15-minute job [and that includes filling in the form!]. You can instantly see the totals received and owed and separate 'tabs' of information give details behind the VAT inputs, outputs and totals.

- Open Postings allow you to work in more than one month at once, so you can still be receiving or paying cash and logging and approving purchase invoices in the current calendar month, even if you are still financially in the previous month. This means that you can keep up with the day-to-day transactions while still finalising your final month end accounts. You can do this in the knowledge that these 'future transactions' will not affect your current months' figures.

- EMIR also allows production of two types of Debt Chasing letters. Simply choose the type of letter [warning/final demand] and the account and it will then list the invoices due.

- Our Professional version also allows for Cashflow Forecasting using actual live invoice data. EMIR will forecast cash arriving or being paid out based on the days to pay for that customers or supplier, but each invoice can then be updated to show a revised payment date. EMIR makes use of the current bank position to forecast forward and will also store the forecast versus actual at the end of each month to see how accurate the forecast actually was.

EMIR
Electro-Mechanical Information Resource

Asset Management

The EMIR Asset Management module allows you to store and enquire on all your clients' managed motors/pumps and other assets, and then allows you to provide comprehensive information to them on their assets and what has happened to them over a period.

The Asset Management module has many useful features to help deliver real benefits to your business:

The EMIR Asset Management module allows you to store and review:

- **Technical details and references about each asset**
- **The site, location and sub-location of where it is used by the customer**
- **The EX status and notes on EX related issues**
- **Unlimited environmental information notes**
- **Unlimited general notes about the item**
- **Additional comments that are transferred to the job when you book in**
- **Photos of the asset to help identification**
- **Link and access any type of file [Word™, etc.]**
- **Track and analyse fault information**
- **Track if a managed asset is surpassed by another or is surpassing another**
- **View all the jobs that have been created for the managed asset**
- **Service interval for the asset along with preferred engineers/trade required allowing for auto raising and scheduling of service work [Professional only].**

All this Asset Management information is available instantly whenever you book in a job for a customer and EMIR automatically transfers all the relevant data to the job to save you re-typing any of it!

Simply set up the customer as a 'Managed Asset' customer, and then add in all their motors/pumps into the database. Whenever you raise a job, EMIR will know that this is a 'Managed Asset' customer and ask if the job you are raising is for a managed asset. If it is, you simply choose an item from their database and all the necessary information such as serial number, customer reference, technical details, additional comments, photo's etc. will be transferred across to the job.

You can then enquire on Managed Assets by Customer and Location, find the managed asset that you need and view all the related jobs for that asset.

EMIR Asset Management will ensure that you, and your client via use of our **Web-CALS** extension, will have complete traceability of all activity to each individual motor/pump. You will know how many times it has been repaired and serviced, the fault history and the complete cost of all activity for the item. You will be able to lead the client as to whether the asset needs to be replaced, serviced or simply covered by a suitable spare if it is in a critical location on this site. In short, Asset Management at its best.

> " From our point of view, EMIR has proved to be an excellent choice. The suitability of the functionality to our multi-site operation allows us to manage our entire business very closely... "
>
> *Mr Martin Savage, Finance Director,*
> *Mid-Kent Electrical, Kent*

- Asset Management is an ideal way to 'lock in' your customers as you will be the only company to collect and maintain an accurate list of all the client's assets. This means that you will be the supplier of choice when it comes to any maintenance, servicing, or repair of their equipment.

- Store comprehensive information about each of the customer's Motors, Pumps, Gearboxes or other electro-mechanical equipment and plan all maintenance and servicing that the equipment will need by raising jobs in EMIR with their required due dates!

- Asset records allow EMIR to look ahead and automatically raise jobs for you based on the service interval of the asset.

- Keep track of all the changes of location of the asset, and whether it is an active, spare or scrapped item. You can report to the customer on how many motors/pumps of each type they have and how much spare cover there is for each – creating opportunities to sell new items to the customer to ensure there is adequate backup for their needs.

- Maintain photo logs of the items so it is easy to ensure that you have the correct item in for service. You can also see how brakes, gearboxes etc. are fitted without the need to attend the site to see for yourself!

- An extension for Asset Management is the **Web-CALS** extension which is our web-enabled Customer Access Link System. Web-CALS enables you to allow your customers to log in directly from their own site and view their own managed asset details. You assign each client a username and password and they are able to access the EMIR managed asset data in a limited and read-only format. You can also use this system to allow your engineers to log in from on-site to check on asset details at any time!

- By using Asset Management and **Web-CALS** together, you can ensure you provide the best customer service possible, and simply the easiest and most direct method for you and the client to share such crucial asset information and find the information you both need to run your businesses successfully.

EMIR

Electro-Mechanical Information Resource
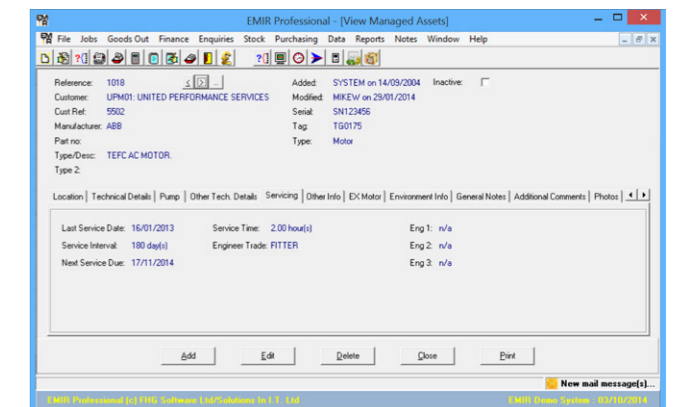
Labour Scheduling

The Labour Scheduling extension is designed to extend EMIR's functionality into planning the staffing and necessary resources to complete the jobs at hand.

The Labour Scheduling extension has many useful features to help deliver real benefits to your business:

Calendar & Job Overviews

The heart of the Labour Scheduling extension are the Calendar and Job Overviews that give an immediate and updating picture of which staff are free and which are allocated to jobs or other tasks.

The Calendar Overview shows employees and resources down the left and days of the week along the top. Each cell [for a person and the date] has a colour shown to represent how busy that person is on the day. For example, white cells show the user is free, while red cells show the user is fully occupied for the day. Green and amber cells show the user is partly occupied. If the user has any activities, job wise or from manual bookings, then the details are shown in the cell and can be clicked on for more detail.

The Job Overview [EMIR Professional] shows the list of currently active jobs [in terms of those with labour scheduled] and colour-codes them differently for easy identification of site and service work [or both]. You can click into a cell for a job on any date and simply right-click to select any employees you wish to allocate and you can also copy and paste staff from one cell to another for super-fast allocation!

Staff Allocation & Skills Required

Staff can be allocated to jobs by setting up the labour requirements against the job or simply by using 'Quick' scheduling to allocate staff to jobs without the need for specification of skills required. Any specific skill requirement can be set by skill set, or can be chosen from a created team of employees and allocated in one entry.

If a skill is required, then the system only shows those engineers who have the appropriate skill set and these are listed for the user to choose. Engineers can be allocated for multiple days in one go, and this can optionally include weekend working if necessary. The system will also show a planned cost of using the staff booked onto the job to help with quoting, etc.
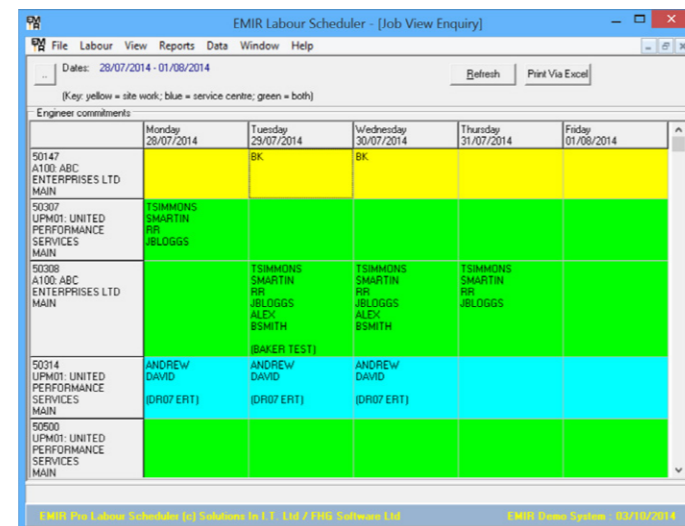
Resource Allocation

In addition to staff, resources can also be entered into the system and allocated to jobs as necessary.

Site Based Functionality

Both resources and staff members are allocated to a site location and can be optionally restricted to jobs that belong to that site only. This can be relaxed if you want to choose from all staff and resources regardless of where they are based.
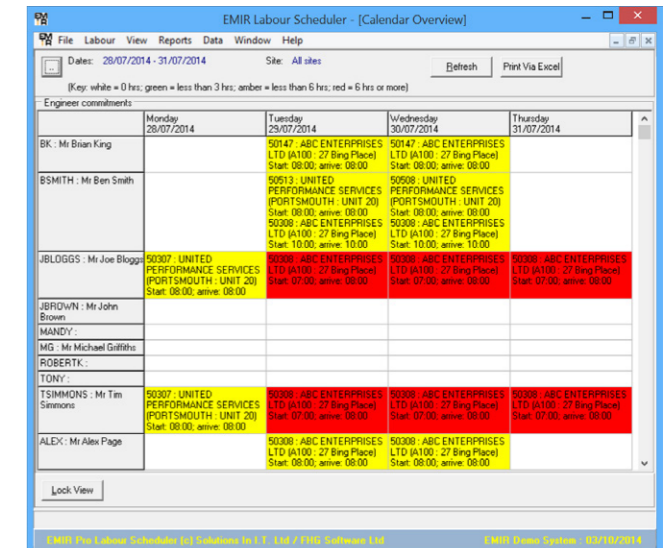
Manual Bookings

If resources or staff are unavailable, such as a person off sick, or a vehicle in for service, then a manual entry can be created to show the staff or resource as unavailable. You can choose a different colour for each class of manual booking so all those of the same type can easily be seen.

- The Labour Scheduling system allows you to see, quickly and easily, who is busy and who is available amongst your staff. So you can see the whole activity picture without the need to leave your desk!

- Engineers can quickly find where they are working, including a detailed map, and which resources they require to do the job. They can even see which vehicle they require and who is going with them!

- Managers can see who is available should an urgent requirement occur, and for those using EMIR Professional, this can be used to check staff availability across all sites to see who has a necessary skill set to be able to perform the required task.

- When planning staff and resources onto a job, the system will calculate the cost of the staff and resources and therefore can be used to help plan pricing for Quotations, etc.

- Engineering 'teams' can also be created and allocated to a job in one step, which makes it very easy to allocate a team of people to a particular job.

- If a job is scheduled to take several days or weeks, then it is very simple to allocate the same engineers and resources to the job for each of those days. The Labour Scheduling system will warn you if any engineers or resources are unavailable for that period and then different/substitute engineers and resources can be allocated instead.

- The system will allow you to record manual bookings to essentially 'book-out' a staff member or resource so they are unavailable [because of sickness, training or other reason], meaning that you can always be sure that the calendar overview reflects the true picture of your staff and resource availability.

- As the Labour Scheduling system is a multi-user, networked application that is directly connected to EMIR, it can be updated by several users at any time, meaning that you do not need to rely on just one staff member to perform the labour and resource allocation.

- Like our entire EMIR software range, the Labour Scheduling system is constantly updated so you can be sure it will continue to grow and improve still further!

" At Knowlton and Newman, we have 100+ staff across 3 sites, the EMIR Labour Scheduling system has proved invaluable with planning and performing the work required for our customers. It gives us great visibility ensuring all staff and management have the information they need to get the job done. "

Mr Robert Knowlton, Managing Director, Knowlton and Newman, Hampshire

EMIR
Electro-Mechanical Information Resource
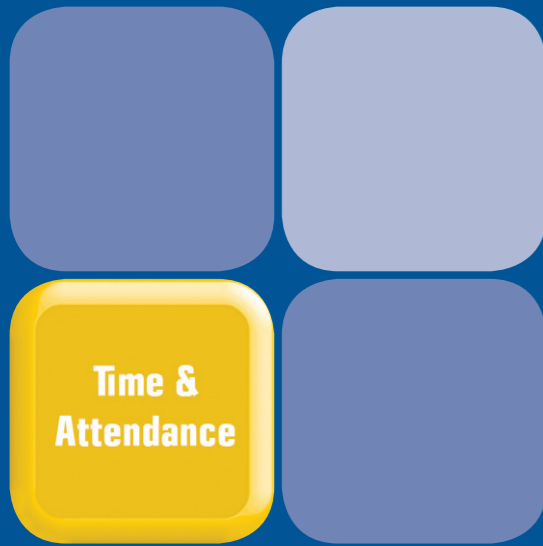
Time and Attendance [T&A]

The EMIR T&A extension allows you to capture the entry and exit times of your staff along with the actual 'live- time' recording onto jobs within your workshop.

The Time and Attendance extension has many useful features to help deliver real benefits to your business:

All entries are created by simply scanning the appropriate barcodes, so no typing or mouse use is necessary.

Entry/Exit System

The entry/exit system part of the application requires the user to swipe their user barcode badge at the entry/exit points of the works. The first scan is entry and then each subsequent scan toggles between exit and re-entry. Each transaction is printed to an attendance sheet, so at any time, a list is available of who is in and out of the building. This list can be taken in the event of an evacuation of the building to provide a record of those still on site. There is also an Entry Viewer that shows the current status of each employee as to whether they are in/out of the building.

Live Time Recording [LTR]

The LTR function is simple in its use, as 3 scans at most are needed to record any activity, but can be configured to handle complexities of shift patterns, regular breaks, lunch periods, and bank holidays. It automatically knows whether an employee is working at time, time and a half or double time, etc.

Engineers are only allowed to log onto suitable 'work in progress' jobs and can record their time and current operation by 3 simple scans:-

- **Their username badge**
- **The job number barcode**
- **The operation being undertaken**

Simply by repeating the scanning process when the operation or job changes or the end of the day is reached, will result in EMIR recording completed entries into the EMIR Timesheet system. Manual update of times is therefore possible by amending the timesheet for the employee concerned.

The LTR means that managers can track the progress on a job in real time, and can also plan times for operations and jobs and then compare them to the actual times taken.

Equipment and Barcode Labels

The barcodes required can be easily and inexpensively produced and terminals can be shared by cells of engineers, so the cost of implementation is low. Barcode scanners are required, and the T&A application runs on a windows-based PC.

> " The main objective of the live time management system is to support the development of a performance driven culture by improving efficiency and workforce management systems, minimising human errors when recording time on jobs, enabling invoicing on delivery date and reducing admin time spent on labour recording. The EMIR T&A system is an invaluable tool that helps us to achieve all these objectives. "
>
> *Mr Michael Mitten, CEO*
> *Houghton International, Tyne and Wear*

- Instant 'live-time' picture of who is on and off your premises along with a constantly updating printout that can be torn off and taken in the event of an emergency.

- No need for a keyboard or mouse in any operations. Everything is achieved by scanning barcodes. Easy to use and no effort to train staff in its use!

- Get an instant picture from your desktop of who is in/out by using the Entry Management Viewer.

- See how jobs are progressing in real time as job costing is updated at the completion of each operation, job or working day. This will ensure you know the true picture of your workload.

- You can schedule breaks in the working day, so that staff do not have to do any transactions to stop for lunch etc. The T&A system will automatically stop the current operation and restart it after the scheduled break is completed.

- You can create shifts against employees so the T&A system can record the appropriate time class against each entry. This will ensure that over-time is recorded and charged correctly.

- You can set-up bank holidays, or other public holidays, so that entries recorded that day are done so at the appropriate rates.

- Plan and analyse operations per job by setting planned operations and associated times. You can then compare the actual time recorded live against the planned to check on whether the job is progressing to plan or not.

- Time entries are still editable, via the EMIR Timesheet system, so you can still adjust the entries if you need to. Flexible and easy to use!

- As entries are recorded live, you can get an instant picture of workshop activity, and view what each engineer is currently assigned to at any time – without the need to leave your desk!

- Remove the need for paper timesheets by getting all the activity recorded as it happens. Get accurate costings for your work without the need to chase staff to fill in any paperwork!

EMIR Labour Time Recording

Badge:	BK
Job no:	50300
Operation:	B

Last action: User "BK": job 50300: activity A at 03/10/2014 09:35:27

Activity
User "BK": job 50300: activity A at 03/10/2014 09:35:27

EMIR
Electro-Mechanical Information Resource
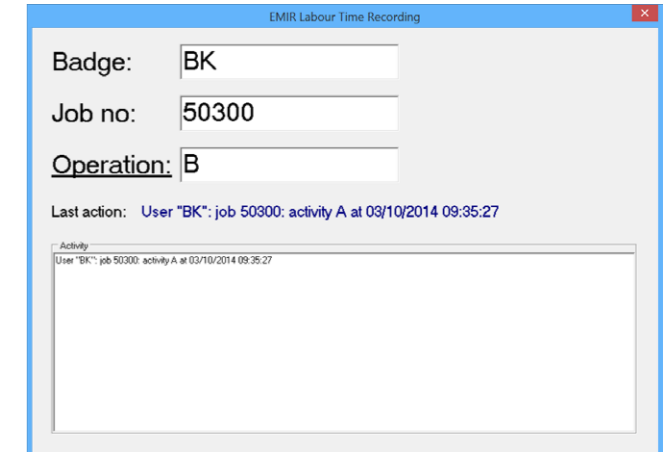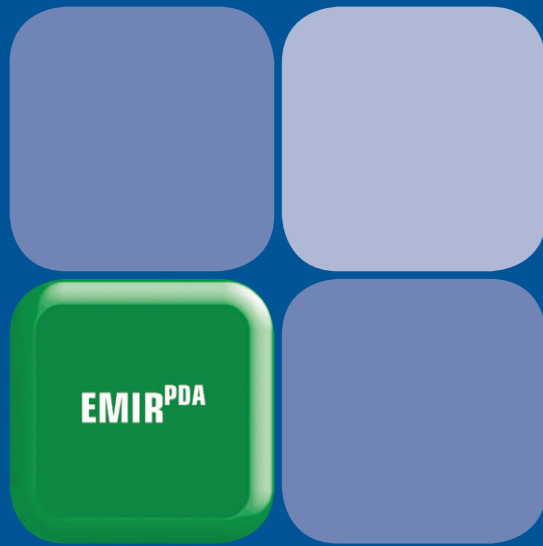
EMIR^{PDA}

EMIR^{PDA} is the ideal supplement to our EMIR Professional and Standard solutions and allows you to capture all the job related activity from your site engineers while they are off your premises.

EMIR^{PDA} has many useful features to help deliver real benefits to your business:
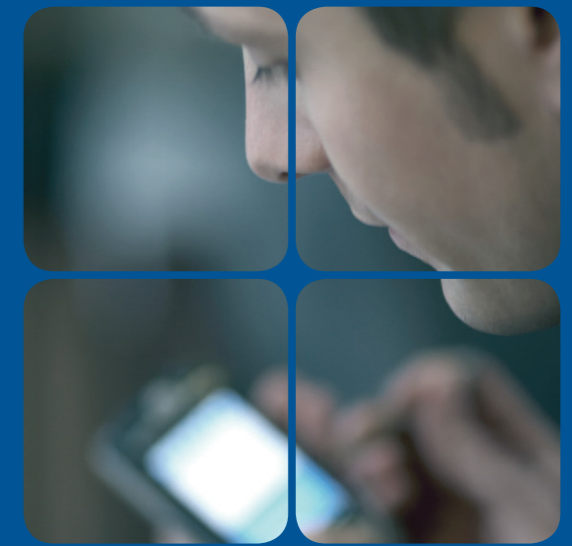
Instead of waiting on bits of paper to return to the office detailing expenses, labour hours, materials used, etc. the EMIR^{PDA} will allow your engineers to:

- **Look at a list of jobs to be done with postcode information to help with directions**
- **View job information**
- **Record their hours worked by job and record an activity if required**
- **Record mileage and other expenses**
- **Record the work carried out**
- **Record any notes about the work that was done**
- **Fill in a safety checklist that is then stored in EMIR against the job's 'File' tab as a PDF file**
- **Create a 'Service Checklist' in EMIR and then complete it on the PDA with each option having a Pass/Fail or N/A tick against it. You can also then tick to show if additional work is required along with an order number and record whether the machine is safe to operate. The service checklist is then instantly available in EMIR and can be interrogated to show jobs that have failed a service item, or require further work, etc. This info is also returned as a PDF file to EMIR so can easily be emailed to the client for proof of the visit's findings.**
- **Get a customer signature to sign off for the work that has been completed – this is also stored as PDF within the EMIR 'Files' tab for the job.**

EMIR^{PDA} is a web-based system that links and indeed, talks directly to EMIR. It is designed to be run on a Personal Data Assistant device [PDA], and will work on any PDA that has internet access and web-browser functionality.

As the PDA website is purely text based, it is fast to load and can work fine off a simple GPRS connection from your mobile and absolutely 'flies' when using 3G and the latest 4G connectivity!

Even if your engineers don't have a PDA device with them, they can access the website from any computer to record their activity.

Put simply, EMIR^{PDA} removes the need for engineers to be filling in reams of paperwork [that may or may not arrive back in the office!] and allows you to see job information in real time.

The EMIR administrator can re-open jobs if needed, and all costings and other PDA recorded activity can still be edited and updated from with the EMIR Professional or Standard systems.

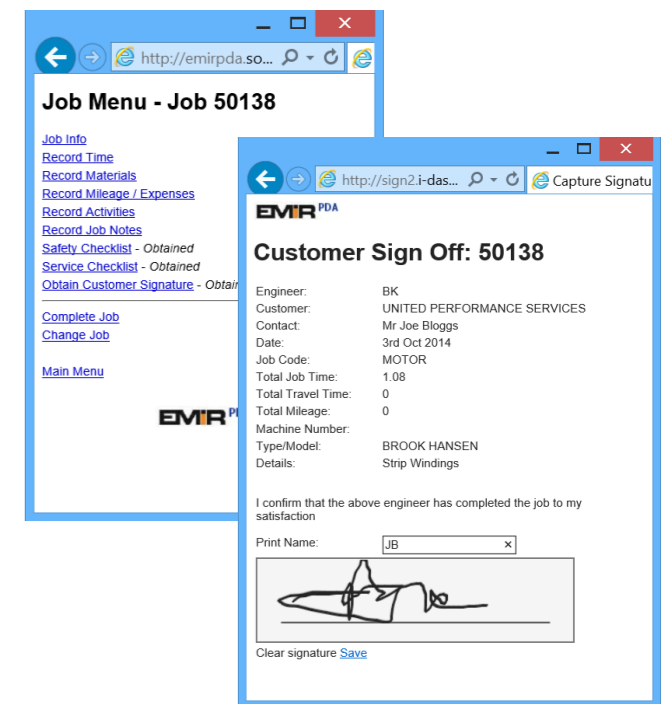All in all, EMIR^{PDA} allows you to capture all the information you need from your engineers to ensure that job processing is smooth and transparent, whilst at the same time, ensuring that you still have total control of job costing information and which information is presented to the client.

> **" At Wilson's we provide many on-site services for our clients, and we wanted to ensure that we had the same control of those jobs as we do with our workshop jobs. By using EMIR^{PDA}, we can now ensure that this is the case and that our information is always up-to-date and accurate. "**
>
> *Mr Graham Brooker, Managing Director,*
> *Wilson Electric Ltd, London*

- EMIR allows you to allocate jobs to engineers, complete with their site address and key job details, so that their work schedule is available via their PDA.

- At any convenient point the engineer can then update EMIR with all the key costs against the job. They can record their hours, expenses and any materials used which will directly update stock levels, ensuring your EMIR system is kept up-to-date even while your staff are at a customer's site.

- The engineer can also record any important notes or change of working requirements, and these are instantly updated in EMIR for all staff to see.

- At the end of the job, the engineer can complete a service checklist [if required] and get a customer signature for the work completed, which shows the customer the hours they have worked. This is effectively approval for the work completed and will be stored as a PDF file against the job in EMIR. This will certainly help with getting your invoice approved!

- With the growing need for risk assessments and Health & Safety checklists, the engineer can easily complete one on his PDA to ensure that this necessary documentation is completed and is again stored as a PDF against the job within EMR.

- The EMIR^{PDA} website is not only for use by PDA devices, but can also be used by any PC with internet access, so even if your engineers don't have PDA's they can update EMIR from their laptops or home computers when they get the chance.

- EMIR instantly reflects any changes or updates made via the PDA system, but all of the information can still be changed or updated by key staff using the normal EMIR windows application.

- EMIR can report on which jobs the engineers have been assigned to, along with map details of the locations of the customer sites, so you always know where your engineers are supposed to be!

- All you need to run EMIR^{PDA} is a Windows server or other server that is capable of hosting web-based applications, and a broadband connection. The PDA devices are not provided, but can usually be obtained for FREE within a company phone contract.

Job Menu - Job 50138

Job Info
Record Time
Record Materials
Record Mileage / Expenses
Record Activities
Record Job Notes
Safety Checklist - *Obtained*
Service Checklist - *Obtained*
Obtain Customer Signature - *Obtain*

Complete Job
Change Job

Main Menu

Customer Sign Off: 50138

Engineer: BK
Customer: UNITED PERFORMANCE SERVICES
Contact: Mr Joe Bloggs
Date: 3rd Oct 2014
Job Code: MOTOR
Total Job Time: 1.08
Total Travel Time: 0
Total Mileage: 0
Machine Number:
Type/Model: BROOK HANSEN
Details: Strip Windings

I confirm that the above engineer has completed the job to my satisfaction

Print Name: JB

Clear signature Save

EMIR
Electro-Mechanical Information Resource

Web Job Tracker

The EMIR Web Job Tracker extension is the ideal way to provide your customers with up-to-date information about how their jobs and orders are progressing.

The Web Job Tracker extension has many useful features to help deliver real benefits to your business:

Engineering "Progress Status"

In addition to the normal EMIR statuses, there is a new 'Progress Status' section where you can define a suitable list of statuses to represent the progress of the job to the customer, e.g. "Dismantled Awaiting Inspection", "Awaiting Parts" or "Delivered", etc. EMIR contains functionality to allow you to easily change the progress status of jobs, including options to update jobs, in bulk, via use of a barcode scanner.

Email or Console – it is your choice!

The start of the process can be simply an email generated by EMIR through your chosen email client such as Outlook™, Outlook Express™ or LiveMail™. The email contains a web hyperlink that the client can click on to see detailed information about the job/order being processed. The hyperlink is encrypted so it cannot be modified by hand to look at other jobs – only the specific item contained.

You can also allow highly-valued clients to access all their job information at once via the Website Console area [see below] by giving each contact a unique login.

Website Console

The Job Tracker website features a console area which allows the client contact to view his/her jobs in a variety of categories such as items requiring attention, jobs that are currently being worked on, jobs awaiting delivery, jobs awaiting invoice and those jobs invoiced in the last 90 days.

After selecting the appropriate list, the user can then drill-down to view the details of any job along with photo's, related documentation and the current progress status. A one screen summary is displayed per job, showing activity on the job, including any key references and order numbers, etc. You can also add multi-media types to the information displayed if you want to show photos and videos of the item being tested, for example.

Customer Service Requests

In addition to seeing the latest information, the customer can also contact you to request more information by emailing you a request for more information, asking you to 'nudge' the job along [if they need it urgently] or requesting a phone call to discuss the job in more detail.

Update Emails

EMIR can also generate emails to the customer informing them of any jobs that have changed 'progress status'.

Surveys

You can also create surveys from within EMIR by setting up 5 custom questions. The user can then click on any finished job via the console, or can be invited separately by email, to complete a survey for the job. The results of such surveys are captured in EMIR and can be analysed by one customer or all, and one department or all, to see how your work is being judged by customers, with EMIR giving graphical representation of the average scores achieved for each question. Surveys can be changed and replaced at regular intervals and their scores analysed separately.

> At Central, we pride ourselves on providing excellent customer service and keeping our customers informed of progress with their jobs. The EMIR Web Job Tracker allows us to provide our customers with useful and timely updates automatically as part of our job management process, and they can view this info 24/7!
>
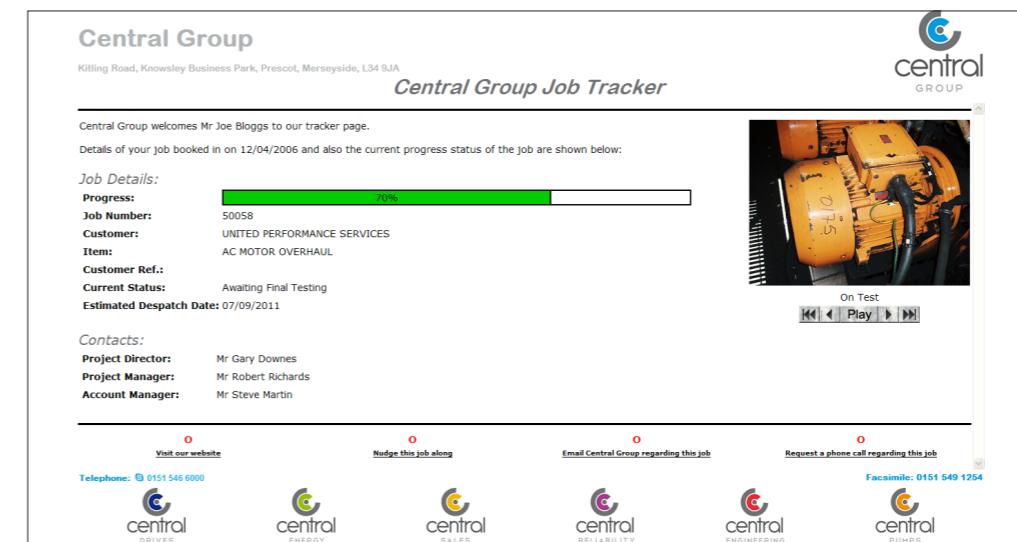> *Mr Shaun Sutton, Director,*
> *Central Group, Merseyside*

- The Web Job Tracker allows the customer to get the latest information about how all their orders/jobs are progressing without the need for a phone call or any direct involvement or other action from your own staff. So this saves you and your staff time in answering phone calls or chasing clients unnecessarily. The console also allows clients to complete surveys as to how you have performed on a job-by-job basis, so you can easily and directly measure client satisfaction.

- Gives the customer a detailed picture of progress – including photo's of the work being undertaken, which will help justify the work required, as well as giving the client a clear picture of progress.

- Totally secure access, so that the client gets the information they require without being able to see any information that they shouldn't!

- The Web Job Tracker will allow the client to view testing work via online videos, without the need for them to leave their office and at a time that is convenient for them.

- The job progress status helps you to organise your workload, so that you know what progress status each item is at instantly. So it's not only better for the client, but also provides management with a better view of how the order-book is progressing and highlights any issues quickly.

- The client still has the option of requesting more information from you, but these requests are received electronically, which is less disruptive than constantly fielding phone calls and means you and your staff can simply get more work done with fewer interruptions!

- Whilst the Web Job Tracker is an extremely powerful tool, it does not require huge expense to implement, with the hardware requirements limited to Windows Server with a broadband connection. This is pretty standard for our customers with multi-user EMIR systems!

- There are very few companies who can offer the client an online enquiry system of such complexity and availability, so it will simply put you way ahead of the competition! Not bad for a system that just requires you to run your EMIR system as normal and will automatically provide the information the client needs via the Web Job Tracker at their convenience, 24 hours a day, 365 days a year!

Central Group
Killing Road, Knowsley Business Park, Prescot, Merseyside, L34 9JA

Central Group Job Tracker

Central Group welcomes Mr Joe Bloggs to our tracker page.
Details of your job booked in on 12/04/2006 and also the current progress status of the job are shown below:

Job Details:
Progress:	70%
Job Number:	50058
Customer:	UNITED PERFORMANCE SERVICES
Item:	AC MOTOR OVERHAUL
Customer Ref.:	
Current Status:	Awaiting Final Testing
Estimated Despatch Date:	07/09/2011

On Test
|◀◀ ◀ Play ▶ ▶▶|

Contacts:
Project Director:	Mr Gary Downes
Project Manager:	Mr Robert Richards
Account Manager:	Mr Steve Martin

Visit our website   Nudge this job along   Email Central Group regarding this job   Request a phone call regarding this job

Telephone: 0151 546 0000   Facsimile: 0151 549 1254

EMIR
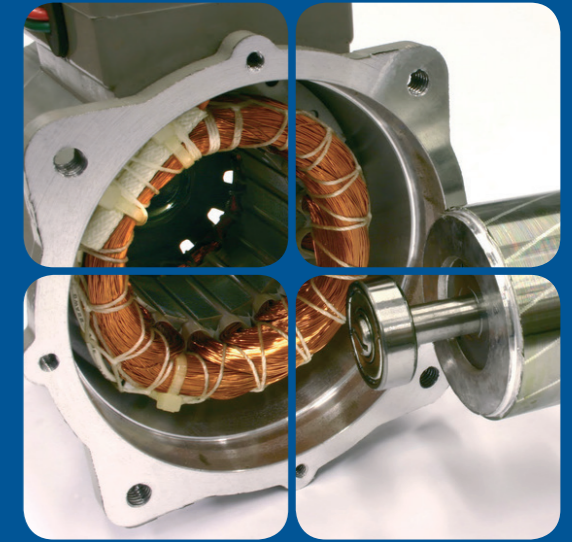Electro-Mechanical Information Resource

Winding Details Database

If you require a way of storing Motor Winding details to create a comprehensive database of Winding information, then this is the software for you!

The Winding Details Database extension has many useful features to help deliver real benefits to your business:

Standalone Software

Our Winding Details Database [WDD] software is provided as a 'standalone' program [you don't have to have EMIR!] to allow you to record such details as found in the AEMT winding database, such as No. of Coils, Turns per Coil, Pitch, Connection, Leads, etc. and separate details for D.C. motors and Commutators, allowing you to store two configurations per motor [Configurations A and B].

You are also able to search via any and all of the winding characteristics, from Make, HP/KW, Volts, Amps, Hertz, Phase, Poles, RPM through to Core Id., Winding Type, Turns per Coil, etc. in order to be able to locate matching winding details and jobs that you have repaired previously. We've even thrown in 5 user-definable fields, [you can label them yourself!] so you have room to store any additional details that you can think of.

Advantages of using with EMIR

If you do have EMIR, then there are even greater benefits to owning the software! You can easily and directly store the Winding Details against a current EMIR job for you to review, update and print, and these details are automatically added into the Winding database, at the click of a mouse, for fast retrieval by any of the winding characteristics, showing you both matching motors and previously matching jobs.

You can also search the Winding Database to find winding specifications for motors that have similar technical details [Manufacturer, Volts, Amps, Phase, Hertz and KW/HP ratings] to any job that you currently have in your system.

Having a database of Winding specifications, directly retrievable via the use of EMIR, will save you lots of time over trying to find the hand-written documents, and will ensure you can safely 'back-up' the information electronically as part of the EMIR system.

In short, the Winding Details Database allows you to store all your Motor Winding details, and makes them available quickly via any method that you could want to find them!

Set yourself apart from the competition by having a fast access storage system for all your Winding Data, and by using this as part of an EMIR implementation, you will have the cost and time savings involved with tying Winding Data directly to jobs and being able to search from within EMIR to find matching winding specs for your work.

"We find the Winding Details Database a valuable tool for our business and, together with EMIR, makes it simple to store winding data and to retrieve it quickly and easily."

Mr Jim Stewart, Managing Director,
Stewart Rewinds, Lanarkshire

- The Winding Details Database allows you to store and retrieve detailed Winding specifications for any motors. This will save you lots of time compared to searching for handwritten paper copies of the same information.

- The database allows you to store detailed specifications as per the fields available and presented in the 'AEMT Winding Database' that is currently available from the AEMT, so you can be sure that the information stored will hold all the necessary data you need to be able to rewind a motor again in the future.

- As the data is stored electronically, you can easily backup the information onto a portable disk or as part of your EMIR backup, meaning that your data is safe in the event of a fire or other disaster.

- The comprehensive technical data can be searched via any of the 70 fields stored, so you can search to find matching information via any of the details that you have.

- The Winding Details Database not only allows storage and retrieval of information on AC or DC motors but also allows you to store Commutator, Bearing and other associated details for a complete picture of information.

- Whilst we believe that all the fields that you may need are provided for you, we have also given you 5 extra fields that you can re-label and make use of as you wish! So there should never be any reason why you can't store or find the information that you need!

- The Winding Details Database can be used as a stand-alone piece of software, separate from EMIR, but there are greater advantages to be had by using it in conjunction with EMIR, such as easier adding of information and easier retrieval of information directly from your existing EMIR details.

- In short the Winding Details Database is designed to make your life easier and help you to safely store and retrieve the important winding information that you have had to write on paper until now!
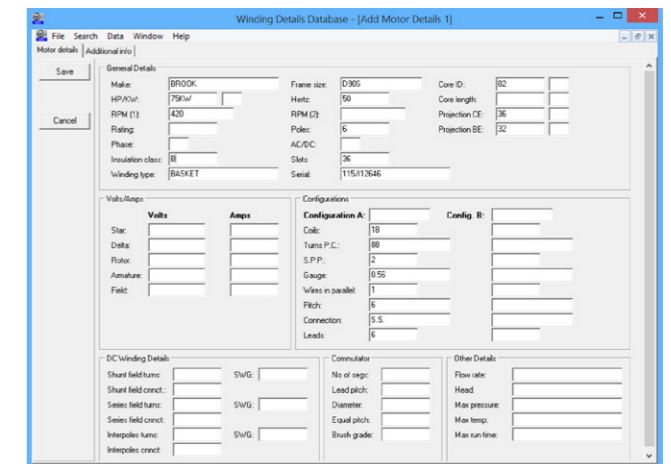
Web-CALS

The Web-CALS extension is designed to allow your customers to enquire on their managed motor/pump details via use of the Internet and Internet Explorer or other browser.

The Web-CALS extension has many useful features to help deliver real benefits to your business:

Easy Asset Management

Your customers can access the system whenever they like and have controlled and secure access to their own asset information. (You must be running the Asset Management module within your EMIR software for this extension to be applicable).

Data Availability

The Web-CALS system allows your customers to view their EMIR Asset Management data. Your customer can enquire by the location, technical details or key motor references to find out any information they need about their own motors/drives/pumps, etc.:

- **The technical details and references about each motor**
- **The current status of an asset as to whether it is active, spare or has been scrapped**
- **The site, location and sub-location of where it is used**
- **The EX status and unlimited notes on EX related issues**
- **Unlimited environmental information notes**
- **Unlimited general notes about the item**
- **Additional comments [transfers to EMIR jobs]**
- **Photos of the asset to help identification that also transfer to the job**
- **Link and access any type of associated file [Word™, Excel™, Text, CAD, etc.]**
- **Analyse fault information. Identify all the faults seen against the asset along with their frequency**

- **Track if a managed motor/pump is surpassed by another or is surpassing another**
- **View all the jobs for the managed motor/pump with status, price, delivery and invoicing details. In short, a comprehensive view of all activity undertaken on the asset.**

Hardware Requirements

As the information is displayed via the use of a website, it is essential that your EMIR system is based on a server that is capable of hosting a website such as a Microsoft Windows Server with its IIS web hosting platform. The server also needs to have its own fixed IP address and be connected to a broadband connection so that data can be transmitted in a timely fashion over the Internet.

> " At Boxall's, we provide a vital Asset Management system for our clients. The Web-CALS system allows us to manage their assets fully and also facilitates client access to the information whenever they need it "
>
> *Mr Ron Ransley, Managing Director, T.A. Boxall Engineering, Surrey*

- Web-CALS allows the customer to get the latest information on their managed assets without the need for a phone call or any direct involvement or other action from your own staff. So this saves you and your staff time in answering phone calls or chasing clients unnecessarily.

- As Web-CALS is an online tool, it can also be accessed by your own engineers, to help identify the correct items to work on whilst they are on site.

- Web-CALS provides the customer with a detailed picture of their assets – including photos and location information, which will help them in identifying where their assets are located and what they look like. This is essential for identifying the correct items for repair work or maintenance tasks.

- Web-CALS provides totally secure access. The client can only view information relating to their own assets without being able to see any information that they shouldn't!

- Web-CALs provides comprehensive information on each asset, including detailed fault analysis, the number of times

it has been repaired or maintained and all the relevant information they could require. Not only does it give instant access to the information, but you can rest assured that no sensitive costing information will be displayed, so they won't be accessing any price/profit sensitive information. It is also only read-only, so it cannot be changed or modified by the client directly.

- Whilst Web-CALS is an extremely powerful asset management tool, it does not require huge expense to implement, with the hardware requirements limited to a Windows Server with a broadband connection. This is pretty standard for our customers with multi-user EMIR systems!

- There are very few companies who can offer the client an online enquiry system of such complexity and availability for their key electro-mechanical assets, so it will simply put you way ahead of the competition! Not bad for a system that just requires you to run your EMIR system as normal and will automatically provide the information the client needs via Web-CALS at their convenience, 24 hours a day, 365 days a year!

EMIR
Electro-Mechanical Information Resource
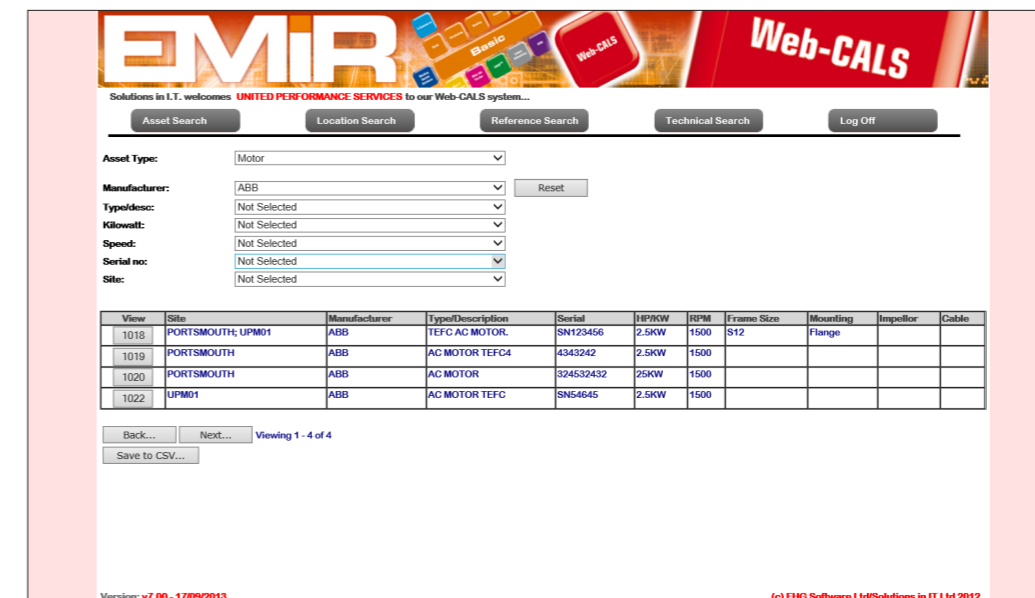
E-Commerce

EMIR E-Commerce is a complete solution for trading online. It combines the stock system and order processing capabilities of EMIR with a fully transactional website to get you trading online and also provides your customers with the same discounts, accounts and other details they have in EMIR.

The EMIR E-Commerce extension has many useful features to help deliver real benefits to your business:

Enhanced stock database within EMIR

Featuring photos against stock items, and other fields to enable online selling.

Fully transactional E-Commerce website

Customised to show your own company branding, details and content that you can either host on your own windows server or on a shared server [for a separate fee] – either way the 'shop' can link off your existing website if you have one.

Space for your own Marketing Information

The E-Commerce website also features 'content' pages for your marketing and product information, so this could be the only website you ever need!

Linked directly to your EMIR data

Either an offline [import a file] or a direct and active link from the E-Commerce website to EMIR [own server required]. This means that your E-Commerce website is easily updated to hold all the same items as your EMIR system [a marker in EMIR lets the website know which products are available for sale on-line – you don't have to sell every stock item!]

Order Processing in EMIR

Duplication is eliminated all orders received on the web site are automatically imported into Order Processing within EMIR.

Take Payment On-line

Integrated links to a payment provider are available [as required].
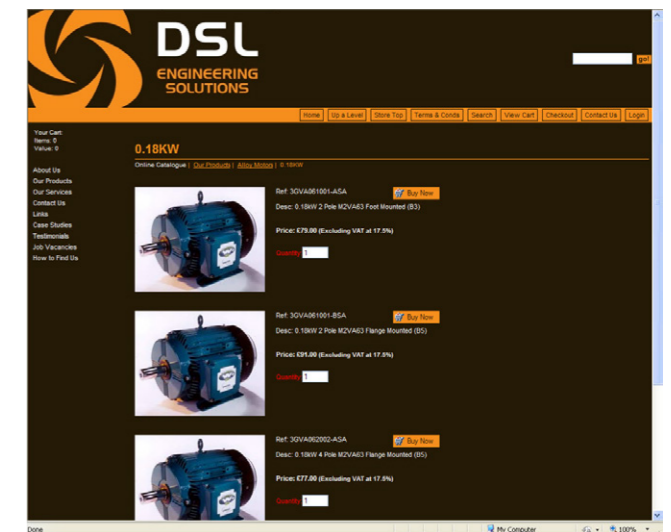
Track Delivery On-line

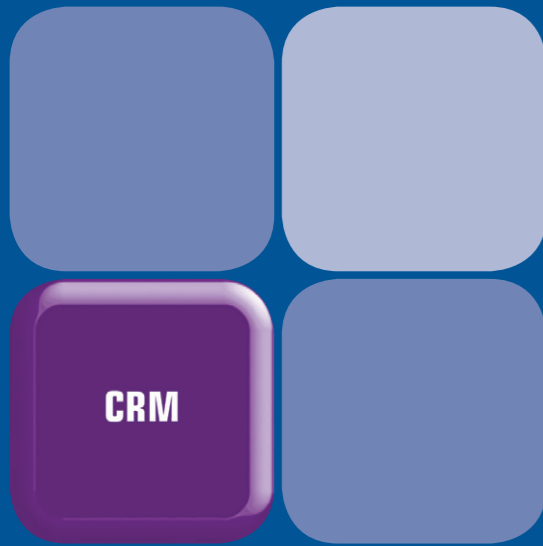Integrated links to a carriage provider are available [as required].

System Requirements

As the information is displayed via use of the e-commerce website, it is essential that you either have a server that is capable of hosting e-commerce such as a Microsoft Windows Server with its IIS web hosting platform or hosting equivalent, such as EMIR-Cloud. If you do host via your own server it is recommended that it has a fixed IP address and is connected via a high-speed broadband connection, so that data can be transmitted in a timely fashion over the Internet. However, because of the nature of 24-hour trading, and the need for the website to be available 24/7/365, it is recommended that a professional hosting and support is provided and this can be arranged for you by Solutions in I.T. Ltd.

- This extension allows you to sell your stock directly via your own EMIR E-Commerce branded website. We'll design the store for you and you can load your products directly into the store via EMIR. The website also allows you to create and display marketing information, so in short, it is the only website you may ever need!

- The EMIR E-Commerce website provides detailed product pages with basket functionality allowing you to receive orders directly over the Internet to either known accounts or new customers paying by Credit or Debit Card [as required].

- Payments and order details are taken securely and on-line clearance for credit/debit card payments can be provided via many available online payment clearance services.

- Once you have received an order, you can download it into EMIR for immediate processing and stock allocation. There is no need to re-type any information and stock levels are kept current.

- You can start by creating accounts with usernames and passwords for all your existing customers and ensure that their discount structure from EMIR is available to them for their online purchases.

- If you wish to, you can also connect to on-line parcel tracking services provided by your courier so your customer can track delivery for themselves.

- There are very few companies who can offer the client an integrated E-commerce website of such complexity and availability, so it will help to put you ahead of the competition!

- The beauty of selling directly on the Internet is that it works for you 24 hours a day, 7 days a week and 365 days a year. It's a fantastic feeling to take orders while you are actually asleep!

- This is an ideal way to improve your export sales and find new customers, and to ensure your existing customers can find the products they need whenever they need them.

- Quite simply, this is an easy and integrated way to get into trading online, and because it integrates with EMIR, it minimises the amount of effort you have to make to start selling online. Why not provide a 24-hour sales business to go with your 24-hour service!

> DSL can now drive the expansion of the business forward, confident that the EMIR software can support the growth whilst at the same time offering user-friendly and functional software.

*Ms Cheryl Lockley, Managing Director,
Detailed Services Ltd, Manchester*

E-Commerce

EMIR
Electro-Mechanical Information Resource

CRM

The Customer Relationship Management extension, or CRM for short, is designed to give you a total picture of all activity related to improving your customer service and sales and marketing efforts.

The CRM extension has many useful features to help deliver real benefits to your business:

Ultimate Sales Management Tool – Anywhere!

The CRM extension is the ultimate sales management tool and is great for both salespeople and business owners alike, allowing you to manage and measure all aspects of sales activity within your company. Also, as it is web-based, it is available from any device with an Internet connection, so can be used on the run, from home, in the office or just about anywhere! What's more CRM has unrestricted licences and receives and updates EMIR totally live, so there is no duplication of data or effort.

Budgets

You can set annual budgets for Salesman by Customer and even have several sales people with budgets for the same client [if they are selling different products/services to the same client]. Sales revenue and forecast sales can then be seen against budget to measure sales performance via customer, site, department and salesperson. Not only that, you can set budgets for the following year simply by applying a percentage increase on this year's budget – so no need to type it all in again!

Sales Pipeline

Not only are orders and revenue tracked, but all aspects of outstanding quotes and opportunities are too. Such future sales are measured by time-scale and a percentage of probability that they will turn into orders, so the sales person can forecast likely sales and track all opportunities from within the CRM system – giving you a view of the pipeline for your entire organisation.

State of Play

Each salesperson is able to see an instant picture of how they are doing and all the tasks they need to do whether it is producing quotes, following-up existing quotes, arranging meetings, developing opportunities, etc. They can instantly see which order numbers need chasing, which customers are on stop, or how a customer is performing against budget or their credit limit.
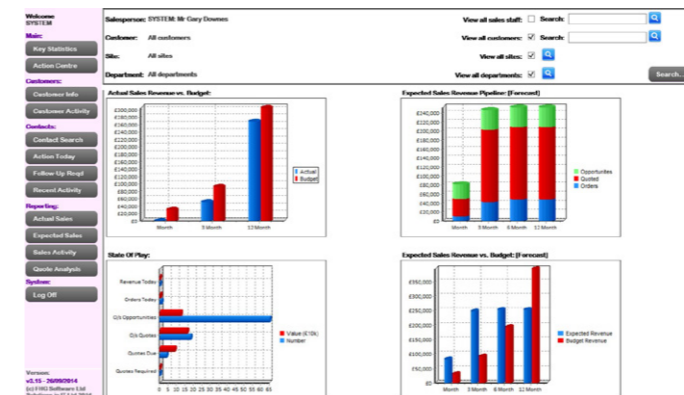
Total Management Control

As a manager you will not only be able to see an individual salesperson's progress, but you can also see an overview of how the business is performing by Site, Department and Customer – giving you a 360-degree view of the sales activity of your company. In addition to measuring sales performance in both revenue and order terms, you can also see what activities each salesperson has undertaken – who they have seen, called and emailed, to give you a total picture of completed and required sales activity within your company.
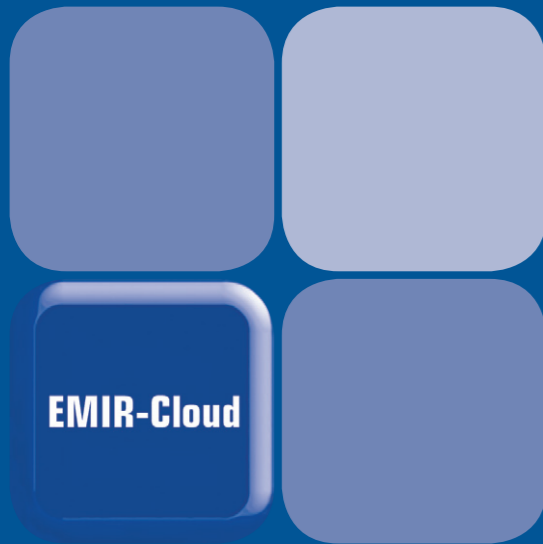
Contact Activity Management

CRM will tell you which customers, or potential customers, need to be contacted and you can add follow-up dates, times and reasons for such activity to ensure every lead is followed-up. You have instant access to search contacts that need to be contacted today or in the near future and you are able to book meetings and send emails via the CRM that are posted automatically into your Outlook or Exchange 'Sent Box' and Calendar. In short, everything a salesperson needs to do can be tracked via the CRM system and can be analysed and reported on!

- The "Key Stats" graphical home page informs your sales staff instantly on how they are performing, both in terms of revenue and order pipeline versus budgets, and summarising the activity needed currently.

- Manage your customer contacts closely and keep track of all activity related to them, ensuring you know exactly how each contact is being managed.

- Track all your quoting activity and ensure you know what stage of the process each quote is at. Measure the effectiveness and productivity of each salesperson in turn and analyse the effectiveness of their efforts.

- Track all key activity by customer and measure your performance in all areas of your business activity relating to customer service. Identify jobs that have stalled, quotes that need to be chased, identify further opportunities for quoting, and follow-up on any comments or complaints that have been made.

- Track revenue generation by salesperson, site, customer and department and ensure you know the depth of your pipeline and conversion rates of opportunities.

- Identify those clients who need attention with an automatic reminder for sales staff when a customer has been inactive for longer than a set pre-defined period or set a period of how frequently you want each customer contacted, regardless of their account activity, and the appropriate salesperson will be prompted to contact them accordingly.

- In short, ensure you are on top of all customer service related issues, keep your customers happy and measure the performance of your sales activity – all in one easy application!

> " The CRM installation was straight forward and the training and support we have received was excellent. [...] I have no doubt that this is going to help us improve our account management process and ultimately have a positive impact on the bottom line. It's also assuring to know that Solutions In I.T. are always on hand to provide support where we need it. They could not have been more accommodating in terms of tailoring their service and product to our particular needs. We really appreciate it. "
>
> *Mr Dave Marr, Operations Director, Deebridge Electrical Engineers, Aberdeenshire*

EMIR
Electro-Mechanical Information Resource

EMIR-Cloud

The benefits of the EMIR Business Solution, hosted for you in a secure data centre without the worries of backing up information, virus protection or the fear of running out of space.

EMIR-Cloud

Your entire working computer environment delivered to your desktop, wherever and whenever you need it:

The Technology behind the EMIR-Cloud

First of all, let's define the Cloud. The Cloud is a virtual place where you store information. In essence, it's a computer server that no longer resides in your premises, but in a secure data centre on the backbone of the internet.

…and we mean, secure! Only you have access to this information. It is protected and because you no longer have a need for a computer server in your office, you no longer need to worry about server maintenance, virus protection, backing up your data, email storage, hard disk or memory space, or even the number of processors required – the Cloud is easily configured for you and your changing needs!

- **The Cloud is flexible**
- **The Cloud is reliable**
- **The Cloud is a complete and secure hosted solution**

Specifically, what's the EMIR-Cloud?

The EMIR-Cloud allows you to move all of your company's software to a hosted platform including any configuration of EMIR, Email accounts and Microsoft Office for your entire company and any other application which helps you do business. These may include three dimensional drawing programs, configuration software from trusted suppliers or HR Software, the choice is yours.

The most important thing to remember is your data is safe. Whether it's a series of complex drawings, a lifetime's history of rewind or pump repair information or your financial accounts, the information is also **replicated** to another secure environment. You won't lose it!

How do I use the software?

You can connect to the EMIR-Cloud using any internet enabled computer, simply enter the correct password and you can work in the same way that you always have. Your local printers in the office remain connected and now you have a little bit more room where the old server used to be housed.

- Fancy working from home?
- Process an order or quote in front of a customer?
- Want to check information about a customer's installation when you are called out in the middle of the night?
- Want your external sales and service people to be better informed?
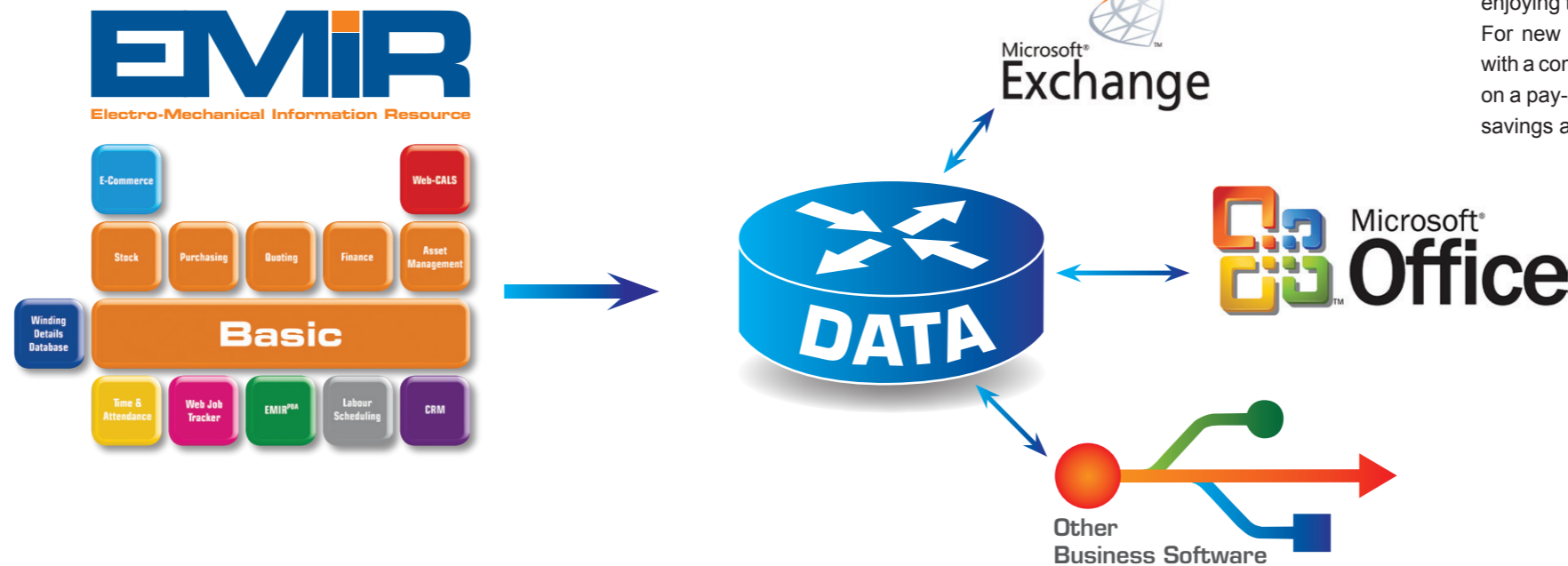
The EMIR-Cloud allows you to connect, when and where you like. You can choose who sees what and instantly reduce the sheer amount of paperwork your business creates.

> " The transition to EMIR-Cloud allowed Hidrostal to move from our own on-site servers supported externally to a fully hosted IT solution in a matter of days. With over 35 employees using EMIR Professional, Microsoft Office and Email, it was important that the business did not suffer during the transfer. I'm pleased to say the move was seamless. "

Mr Neil Langdown, Managing Director,
Hidrostal, Berkshire

Three clear reasons to choose EMIR-Cloud:

1. The Best Software for your Business

A solution that is tailored to your needs in terms of supplying the right software tools to each department. EMIR-Cloud is the same as your on-site installation (or more!). Accounts, job costing, purchasing, time & attendance, CRM, quoting, sales invoicing, whatever you decide.

2. Always Up-to-date and No-hassle

You never have to worry about virus & malware protection, firewalls, having the latest operating systems or keeping the server patched. All of this is taken care of. Every computer user will have the latest version of Microsoft Office and the backup and virus protection is automatically updated.

3. No Up-front Hardware or Software Costs

The EMIR-Cloud model is supplied on a monthly rental allowing you to spread the payments across the year, whilst enjoying the benefits of a fully integrated EMIR environment. For new users to EMIR, the EMIR-Cloud is complimented with a comprehensive on-site and on-line training programme on a pay-as-you-go basis, ensuring that efficiencies and cost savings are guaranteed.

EMIR
Electro-Mechanical Information Resource

E-Commerce				Web-CALS
Stock	Purchasing	Quoting	Finance	Asset Management
Winding Details Database	**Basic**			
Time & Attendance	Web Job Tracker	EMIR POA	Labour Scheduling	CRM

Microsoft® Exchange

DATA

Microsoft® Office

Other Business Software

EMIR

Electro-Mechanical Information Resource

EMIR and You

Are you considering a fully integrated business solution designed for your business?

EMIR is the answer!

EMIR & You

EMIR – It will work for you!

The EMIR Team delivers business software solutions to the Electro-Mechanical industry, whether you specialise in Electric Motors, Drives, Gearboxes, Generators, Pumps, Control Panels and their sale, service, repair or manufacture, we have a tailored solution to meet your needs.

20 Years+ of EMIR Experience

No-one can deny that the industry has changed dramatically in the last twenty years. As businesses have changed, EMIR has adapted to compliment the innovation and vision of its users, creating a range of fully featured Modules and Extensions for every aspect of the industry through our customers' direction.

Trade Associations

With our membership of the AEMT, BPMA and EASA trade associations, we keep our finger on the pulse of the Electro-Mechanical Industry. We support our customers through any changes in legislation and produce product that meets the rigors of diversification and business change. No matter how complex or simplistic the requirement, EMIR delivers results by design.

Over 2,000 Users around the World

Don't take our word for it. With over 2,000 Users around the World utilising the functionality of EMIR in their business, we have case studies and testimonials across the industry. Take a look at our website **www.emirsoftware.com**, and you'll discover the background of our product and the names of many of the businesses that rely on EMIR.

Follow us on the World Wide Web and Social Media

www.solutionsinit.com/news

www.solutionsinit.com/clients

www.linkedin.com/company/solutions-in-i-t-ltd

@emirsoftware

The EMIR System – 5 Little Steps

If you have a desire to change and improve, a need to resolve issues or streamline your current procedures or simply want to save valuable time and money, then you won't go far wrong speaking to the EMIR team.

1. It costs nothing to take a look

Be curious. We want to know more about you and your specific situation and needs and in return, if EMIR is right for you, we'll show you just how many benefits you can expect, offer pricing with no hidden extras and give our best estimate of timescales.

2. Installation & Setup – making the change

As a business, you are likely to already be using a selection of software products to keep control. EMIR Modules and Extensions are integrated meaning that everything that is important in the business is held centrally. We'll help you make that transition moving your existing static data to the new system.

3. Training – gaining the skills

Getting to grips with a new business software solution can be daunting. As the industry standard application, EMIR has a familiar, intuitive feel giving your users the confidence to process jobs quickly and easily. With a test system created from your real data and a training programme including hands-on tuition, you'll soon have all the skills you need.

4. Support – keeping on the right track

Whether you need to ask a question, resolve an issue or make a change to the system, EMIR's support team is on hand to take your call. We provide on-site support in conjunction with your go-live date and first financial period end, helping when you need it most.

5. Maintenance – the benefits of innovation

Combined with support, an EMIR Maintenance programme delivers an unparalleled level of innovation and new features. With over a dozen modules and extensions to choose from, EMIR has functionality for every aspect of an Electro-Mechanical business and it constantly evolves to ensure it meets your growing needs.

Notes

EMiR

Electro-Mechanical Information Resource

Market-leading business management software for the Electro-Mechanical industry.

Solutions in I.T. Ltd

Harborough Innovation Centre
Airfield Business Park
Leicester Road
Market Harborough
Leicestershire
LE16 7WB

Tel: 0845 009 4588

Fax: 0845 009 4599

info@solutionsinit.com
www.solutionsinit.com
www.emirsoftware.com

Solutions in I.T. Ltd

@emirsoftware

EMiR CLOUD EASA The Electro-Mechanical Authority EUROPEAN & WORLD CHAPTER Member of The PUMP BPMA industry association AEMT The Association of Electrical and Mechanical Trades EMiR 20 YEARS 1994-2014