



FaciliWorks® 8i

Mobile CMMS Quick Start Guide



FaciliWorks® 8i

Mobile CMMS Quick Start Guide



CyberMetrics®

CyberMetrics Corporation
1523 W. Whispering Wind Drive
Suite 100
Phoenix, Arizona 85085
USA

Toll-free: 1-800-776-3090 (USA)
Phone: 480-295-3465
Fax: 480-922-7400

www.CyberMetrics.com

U.S. GOVERNMENT RESTRICTED RIGHTS

This software and documentation are provided with RESTRICTED RIGHTS. Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subdivision (b)(3)(ii) of The Rights in Technical Data and Computer Software clause at 252.227-7013. Contractor/manufacturer is CyberMetrics Corporation.

QUESTIONS

Should you have any questions concerning this agreement, or if you wish to contact CyberMetrics Corporation for any reason, please write or call:

CyberMetrics Corporation
1523 West Whispering Wind Drive, Suite 100
Phoenix, Arizona 85085
Toll-free: 1-800-776-3090 (USA)
Phone: 480-295-3465
Fax: 480-922-7400

TECHNICAL SUPPORT

Technical support is available during normal business hours, Mountain/Central time:
1-800-776-3090
support@cybermetrics.com
<http://faciliworks.com/support>

Note: technical support cannot be provided unless the user has a current maintenance agreement.

TRADEMARK ACKNOWLEDGMENTS

All CyberMetrics Corporation products are trademarks or registered trademarks of CyberMetrics Corporation. All other brand and product names are trademarks or registered trademarks of their respective holders.

SOFTWARE LICENSE AGREEMENT

This is a legal agreement between you, the end user and CyberMetrics Corporation ("CyberMetrics"). BY USING THIS SOFTWARE, YOU ARE AGREEING TO BE BOUND BY THE TERMS OF THIS AGREEMENT. IF YOU DO NOT AGREE TO THE TERMS OF THE AGREEMENT, PROMPTLY RETURN THE DISKS AND THE ACCOMPANYING ITEMS (including written materials and binders or other containers) TO THE PLACE FROM WHICH YOU OBTAINED THEM FOR A FULL REFUND.

SOFTWARE LICENSE

1. **GRANT OF FACILIWORKS 8i LICENSE.** CyberMetrics grants to you the right to install one instance of FaciliWorks 8i (“the SOFTWARE”) on one server. This installation will serve concurrent client sessions up to the number of purchased concurrent user licenses.

2. **COPYRIGHT.** The SOFTWARE is owned by CyberMetrics or its suppliers and is protected by United States copyright laws and international treaty provisions. Therefore, you must treat the SOFTWARE like any other copyrighted material (e.g., a book or musical recording) except that you may (a) make copies of the SOFTWARE solely for backup or archival purposes and (b) transfer the software to hard disks provided that only one copy of the SOFTWARE is used at any time. You **MAY NOT COPY** the written materials accompanying the SOFTWARE.

3. **OTHER RESTRICTIONS.** You may not rent or lease the SOFTWARE, but you may transfer the SOFTWARE and accompanying written materials on a permanent basis provided you retain no copies and the recipient agrees to the terms of this Agreement.

LIMITED WARRANTY. CyberMetrics warrants that you may return the SOFTWARE and all accompanying written materials, for any reason, for a full refund, for a period of 30 days from the date of receipt.

CUSTOMER REMEDIES. CyberMetrics’ entire liability and your exclusive remedy shall be, at CyberMetrics’ option, either (a) return of the price paid or (b) repair or replacement of the SOFTWARE that does not meet CyberMetrics Limited Warranty and which is returned to CyberMetrics with a copy of your invoice or receipt. This Limited Warranty is void if failure of the SOFTWARE has resulted from accident, abuse or misapplication. Any replacement SOFTWARE will be warranted for the remainder of the original warranty period or 30 days, whichever is longer.

NO OTHER WARRANTIES. CyberMetrics **DISCLAIMS ALL OTHER WARRANTIES, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, WITH RESPECT TO THE SOFTWARE, THE ACCOMPANYING WRITTEN MATERIALS and ANY ACCOMPANYING HARDWARE. THIS LIMITED WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS; YOU MAY HAVE OTHERS WHICH VARY FROM STATE TO STATE.**

NO LIABILITY FROM CONSEQUENTIAL DAMAGES. In no event shall CyberMetrics, its distributors, its representatives or its suppliers be liable for any damages whatsoever (including, without limitation, damages for the loss of business profits, business interruption, loss of business information or other pecuniary loss) arising out of the use or inability to use this CyberMetrics product, even if CyberMetrics has been advised of the possibility of such damages. Because some states do not allow the exclusion or limitation of liability for consequential or incidental damages, the above limitation may not apply to you.

Table of Contents

Chapter One: Overview	6
-----------------------	---

Chapter Two: Using 8i Mobile	7
------------------------------	---

Main Menu	7
Filtering Records	9
Completing a PM	12
Creating a Work Order	17
Updating Meter Readings	19

Chapter One: Overview

FaciliWorks 8i Mobile CMMS provides an extra layer of flexibility by allowing technicians to enter information about preventative maintenance, work orders and meter readings on a mobile device as the work is being performed, eliminating redundancy, minimizing errors and saving time and effort.

With smart filters, simplified menus and data summaries, the technician can filter for records by pertinent criteria and access the necessary associated task, labor, part, tool, contractor, procedure and checklist details and even create work orders on the fly.

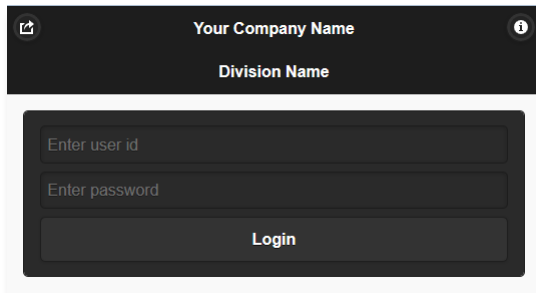
Upon launch of your FaciliWorks 8i Enterprise URL, you will see a **Mobile** link in the upper right corner of the FaciliWorks 8i program window. The visibility of this link means that FaciliWorks 8i Mobile is active and ready for use.



Chapter Two: Using 8i Mobile


Main Menu

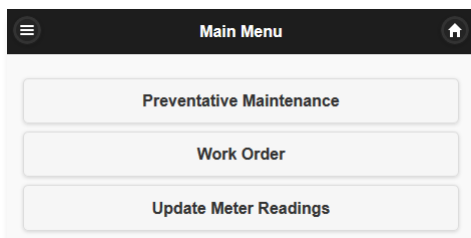
To start using 8i Mobile, tap the aforementioned **Mobile** link on your smart phone or tablet. The application senses that you are viewing from a mobile device and automatically launches FaciliWorks 8i Mobile. You will be prompted for your login credentials:




Note: From this screen, if you require the full FaciliWorks 8i Web application, tap the **Full Site** icon in the upper left corner of the mobile screen: . For information about FaciliWorks 8i Mobile such as version number and technical support contacts, tap the **About** icon in the upper right corner: .

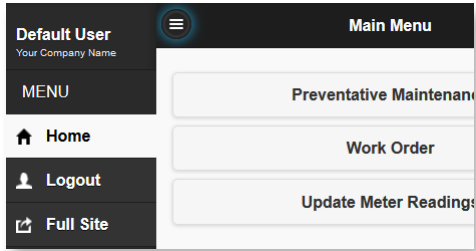
Log in using your FaciliWorks User ID and Password.

Upon successful login, you will see the Main Menu which lists the three main areas that can be manipulated from a mobile device: Preventative Maintenance, Work Orders and Meter Readings. This page can be accessed from other locations within 8i Mobile by tapping the **Home** icon in the upper right corner: .



Tap the **Navigation** icon  to reveal the left navigation menu. From the Main Menu (Home), the following options are available:

- Logout
- Full Site (this toggles the view back to the full version of FaciliWorks 8i)

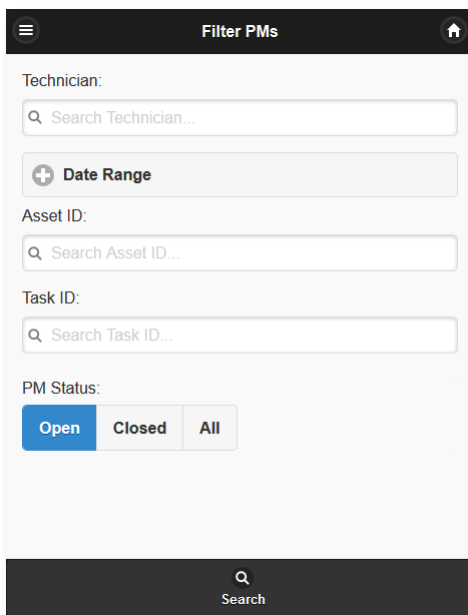


Filtering Records

Because the **Preventative Maintenance** and **Work Order** sections are so similar, the following instructions can be applied to both sections.

From the Main Menu, tapping **Preventative Maintenance** directs you to the **Filter PMs** screen. Smart filters allow you to search PMs by:

- Technician
- Date Range
- Asset ID (typed in or scanned)
- Task ID
- Status (Open, Closed or All)

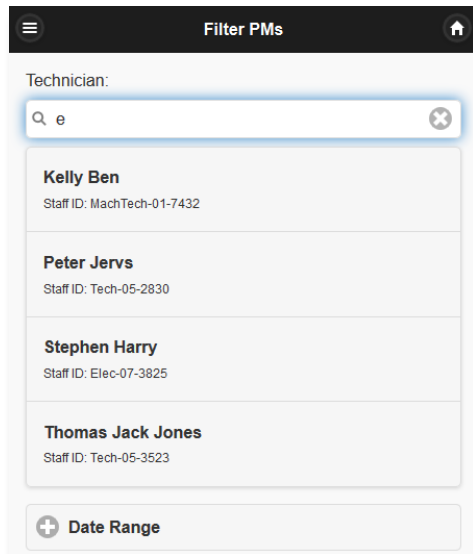


The screenshot shows the 'Filter PMs' screen with the following elements:

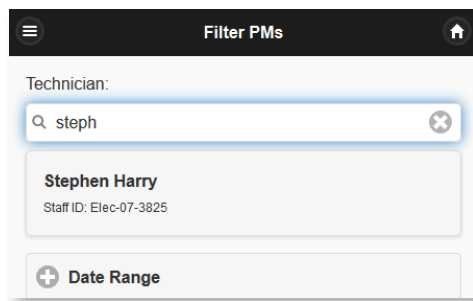
- Header:** A dark bar with a hamburger menu icon on the left, the text 'Filter PMs' in the center, and a home icon on the right.
- Technician:** A label 'Technician:' followed by a search input field containing the placeholder text 'Search Technician...'. Below this is a button with a plus sign and the text 'Date Range'.
- Asset ID:** A label 'Asset ID:' followed by a search input field containing the placeholder text 'Search Asset ID...'.
- Task ID:** A label 'Task ID:' followed by a search input field containing the placeholder text 'Search Task ID...'.
- PM Status:** A label 'PM Status:' followed by three buttons: 'Open' (highlighted in blue), 'Closed', and 'All'.
- Footer:** A dark bar with a magnifying glass icon and the text 'Search'.

When typing in values for **Technician**, **Asset ID** or **Task ID**, a list starts to build based on the first character entered. You may choose the desired item from this list or continue typing to further reduce this list. This type of smart filtering makes data retrieval very quick, minimizing the actual typing from the mobile device.

In this example, the letter **e** is typed into the **Technician** field. Immediately, every technician with the letter **e** in his name or **Staff ID** is listed:



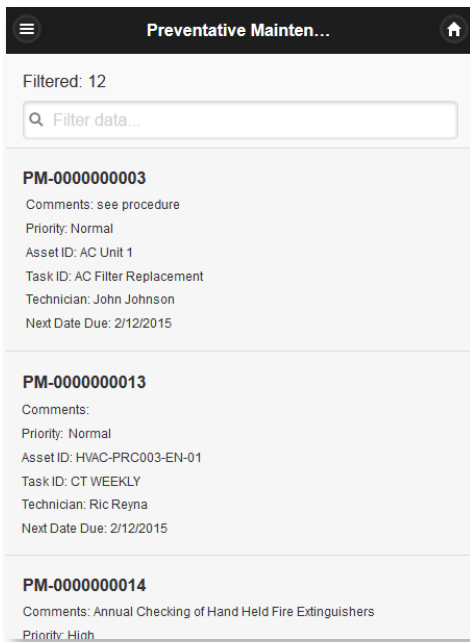
If you wanted to find Stephen Harry, for instance, you'd see his name as an option immediately after typing just an **s**. As you continue to type his name, the list is reduced, making data retrieval very efficient on a mobile device:



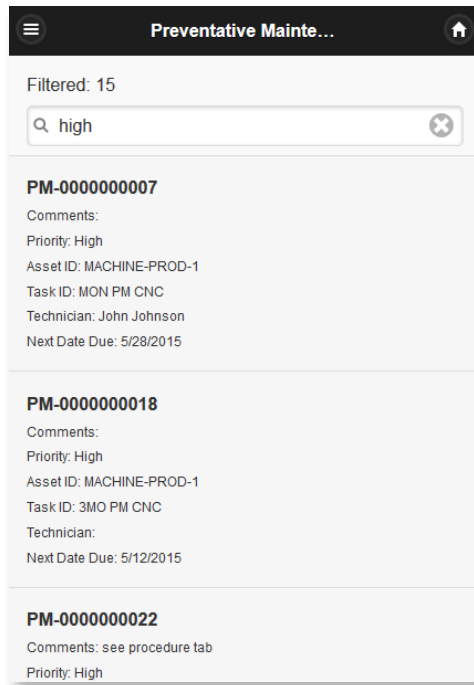
To view PMs assigned to Stephen Harry, for instance, you'd tap his name, tap **Open** (for open PMs), **Closed** (for closed PMs) or **All** (for all PMs) and then tap **Search**.

In this example, we won't specify a technician. Instead, we'll leave all filter fields blank, tap **Open** (to view open PMs) and then tap **Search**. The filtered list contains a summary of each PM:

- PM Number
- Comments
- Priority
- Asset ID
- Task ID
- Technician
- Next Date Due



To further reduce this filtered list for PMs of high priority, for instance, simply type **high** in the **Filter Data** field:



Completing a PM

Selecting a PM from the filtered list reveals the main **Information** screen of the PM record. This screen contains:

- PM Number
- PM Description
- Asset ID
- Asset Description
- Task ID
- Task Description
- Location
- Task Type

- Maint Done Meter
- Maint Done Date
- Downtime
- Cost Center
- Completion Status
- Required Shutdowns
- Shutdowns Performed
- Task User 1
- Task User 2
- Comments

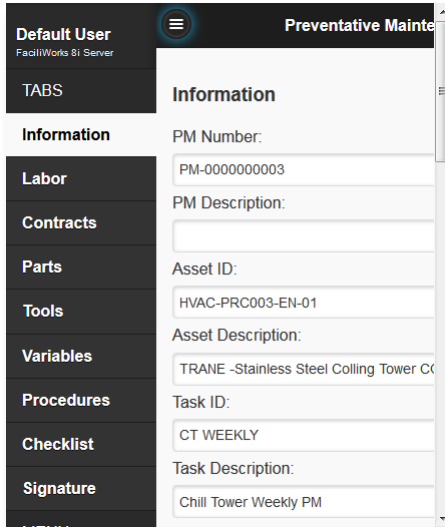
The screenshot shows a mobile application interface for 'Preventative Maintenance'. The form includes the following fields:

- PM Number:** PM-0000000003
- PM Description:** (empty field)
- Asset ID:** HVAC-PRC003-EN-01
- Asset Description:** TRANE -Stainless Steel Colling Tower COOL-PRC003-E
- Task ID:** CT WEEKLY
- Task Description:** Chill Tower Weekly PM

Tap the **Navigation** icon  to view the following tabs:

- Labor
- Contracts
- Parts
- Tools
- Variables

- Procedures
- Checklist
- Signature



Default User
FaciliWorks 8i Server

Preventative Maintenance

TABS

Information

Information

Labor

Contracts

Parts

Tools

Variables

Procedures

Checklist

Signature

PM Number:
PM-0000000003

PM Description:
[Empty]

Asset ID:
HVAC-PRC003-EN-01

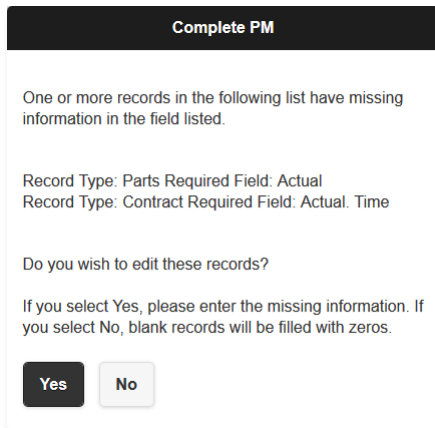
Asset Description:
TRANE -Stainless Steel Colling Tower CC

Task ID:
CT WEEKLY

Task Description:
Chill Tower Weekly PM

Each one of these tabs allows for data input and/or adjustment, to be used depending on your CMMS tracking requirements. **Labor** and **Contracts** information is checked for completeness upon completing a PM to ensure that the associated costs are either tracked or actively dismissed.

Upon attempting to complete a PM that is missing values in required fields, a message similar to this will appear:



Complete PM

One or more records in the following list have missing information in the field listed.

Record Type: Parts Required Field: Actual
Record Type: Contract Required Field: Actual. Time

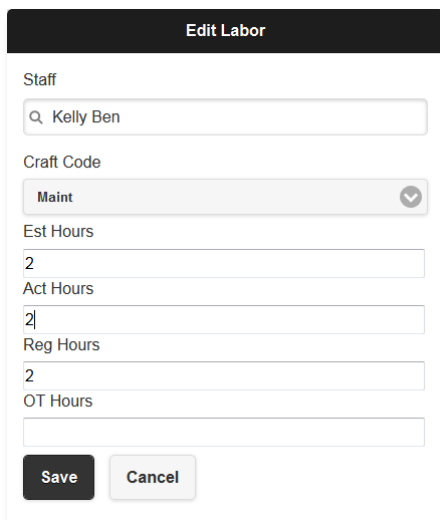
Do you wish to edit these records?

If you select Yes, please enter the missing information. If you select No, blank records will be filled with zeros.

Yes **No**

From this screen, do one of the following:

- Tap **No** to fill the empty **Labor** field(s) with zero(s) for now and then adjust the PM later.
- For the sake of this example, tap **Yes** to go back to the **Information** screen for the PM, access the **Labor** tab, enter the **Actual Hours** and save the record.



Edit Labor

Staff
Q Kelly Ben

Craft Code
Maint

Est Hours
2

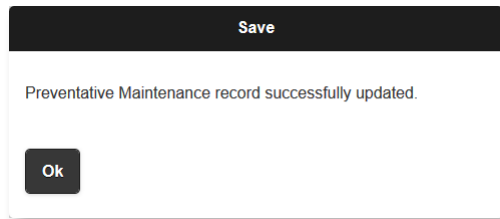
Act Hours
2

Reg Hours
2

OT Hours

Save **Cancel**

The following confirmation will appear; tap **Ok**.



Navigate back to the **Information** tab and check the **Completed** checkbox:

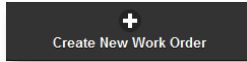
A light gray form with several sections. The first section is "Maint Done Date:" with a text input field containing "09/18/2015" and a clear button (X). The second section is "Downtime:" with a text input field containing "1" and a clear button (X). The third section is "Cost Center:" with a dropdown menu showing "-- select one --" and a downward arrow. The fourth section is "Completion:" with a checkbox labeled "Completed" that is checked. The fifth section is "Required Shutdowns:" with three checkboxes: "Facility" (unchecked), "Asset" (checked), and "Lockout/Tagout" (unchecked).

At the bottom of the screen, tap **Save**. The confirmation message will appear again; tap **Ok**. PM-000000023 has now been successfully closed and actual labor hours have been accurately captured.

Creating a Work Order

As previously noted, the PM and WO sections are almost identical within 8i Mobile, with the emphasis being on updating and completing the records, but you can also create an unscheduled work order on the fly.

From the Main Menu, tap **Work Order**; the **Filter Work Orders** screen appears. Tap the **Create New Work Order** button in the lower right corner:



8i Mobile opens a new work order record and assigns a **WO Number**. Automatic numbering settings in the main FaciliWorks 8i application will be honored in 8i Mobile. In the case of an emergency work order, enter the **WO Description**, use the smart filters to locate the **Asset ID** and **Task ID**, choose **Priority** (High) and check the **Emergency** checkbox. Use the smart filter to locate the name of the **Assigned Tech** and then enter the **Problem Code** and **Comments**:

A screenshot of the "Create Work Order" form in the 8i Mobile application. The form is displayed on a dark background with a white header "Create Work Order" and a home icon. The form fields are as follows:

- WO Number:** A text input field containing "WO-092015-003".
- WO Description:** A text input field containing "Emergency HVAC repair" with a clear (X) button on the right.
- Asset ID:** A search input field containing "HVAC-PRC003-EN-01" with a magnifying glass icon and a clear (X) button.
- Task ID:** A search input field containing "Repair" with a magnifying glass icon and a clear (X) button.
- Priority:** A dropdown menu showing "EMERGENCY" with a downward arrow. Below it is a checkbox labeled "Emergency" which is checked.
- Assigned Tech:** A search input field containing "John Johnson" with a magnifying glass icon and a clear (X) button.
- Problem Code:** A dropdown menu showing "Mechanical Failure" with a downward arrow.
- Comments:** A large empty text area for entering comments.

At the bottom of the form are three buttons: "Save" (with a checkmark icon), "Reset" (with a circular arrow icon), and "Cancel" (with a left-pointing arrow icon).

Swipe to the bottom of the window and tap **Save**. The WO has now been created and assigned. All email notification and work flow is processed per the main application's configuration. You will receive a confirmation message that the work order has been created; tap **OK** to continue.

Now you are free to process this work order. Note that while in the **Work Order** screen, the left navigation pane contains the same selection of tabs as the PM section:

The screenshot displays the 'Work Order' screen. On the left is a dark navigation pane with the following tabs: Information, Labor, Contracts, Parts, Tools, Variables, Procedures, Checklist, and Signature. The 'Information' tab is selected. The main content area is titled 'Information' and contains the following fields:

- WO Number: WO-092015-003
- WO Description: Emergency HVAC repair
- Asset ID: HVAC-PRC003-EN-01
- Asset Description: TRANE -Stainless Steel Colling Tower COO
- Task ID: Repair
- Task Description: Unscheduled Maintenance

After filling in any necessary information on the work order **Information** screen and other tabs, (just as in PMs), check the **Completed** checkbox (on the **Information** screen) and then tap **Save**.

Updating Meter Readings

Choosing **Update Meter Readings** from the Main Menu yields the filter view of all meters requiring updating. You may choose from this list or if it is long, reduce this list by typing appropriate characters into the **Filter Assets** field.

Filter Meter Readings

Filter assets...

Knife Roller Ginning Machine
Description: Classified as oscillatory/rotary knife.
Serial No: ASN-1122-002

Saw Ginning Machine
Description: SGM for removing cotton fiber from seed.
Serial No: ASN-1122-001

Back to Top

Select the desired asset, update the **On Current Meter** field and then tap **Save**:

Update Meter Readings

Asset ID:
Saw Ginning Machine

Asset Description:
SGM for removing cotton fiber from seed.

Asset S/N:
ASN-1122-001

Rollover Meter Reading:
0

Total Time:
8032

On Current Meter:
8032

Save

Upon saving you will receive a confirmation message; tap **Ok**.

It gets even better.

Further streamline your workflow, improve productivity and reduce costs with any or all of these additional FaciliWorks products. Contact us today to place your order.



The **FaciliWorks Web Service Request Module** allows an unlimited number of users in various locations to quickly create and submit service requests to a central maintenance department, eliminating time-consuming phone calls and written requests, while providing centralized documentation of every service request and its outcome. Once a request is submitted, it is automatically routed to FaciliWorks to be viewed by the maintenance manager who can then delete it or approve it and convert it into a work order. FaciliWorks can be configured to send automatic emails to need-to-know personnel at each step of the process and the maintenance manager can monitor the status of the requests and work orders from the FaciliWorks Dashboard.



The **FaciliWorks Maintenance Label Kit** lets you create highly durable, laminated, bar-coded labels for all of your equipment directly out of FaciliWorks. This compact Brother® printer (PT-P900W desktop or PT-P950NW network) comes with cables, design software and a starter label cartridge; the harsh-environment labels are available in a variety of sizes and colors. Use this label kit to print highly durable, laminated labels for all of your equipment.



FaciliWorks 8i Calibration: Two Powerful Products. One Ground-breaking System.

FaciliWorks 8i Calibration combines all of the benefits of FaciliWorks 8i with the power of our GAGetrak® software, the world's leading calibration management software, to deliver an all-in-one enterprise asset management server solution. FaciliWorks 8i Calibration includes all of the CMMS functionality plus gage entry, calibration scheduling, tracking of gage locations, retrieval of calibration records, production of calibration certificates and the ability to track the as-found condition of gages. Manage your maintenance and calibrations with FaciliWorks 8i Calibration.



TaskPro and SafetyPro are fully customizable, comprehensive procedure databases that install directly into FaciliWorks to save you the time and trouble of creating the procedures yourself. TaskPro is comprised of maintenance procedures covering 250 different topics related to facility and equipment maintenance. SafetyPro is comprised of step-by-step safety checklists to assist with OSHA compliance, covering 40 different topics including fire protection, stairs and stairways, hand tools and just about anything else you might need.



The **FaciliWorks 8i Validation Kit** helps you establish and document FDA validation of FaciliWorks. It includes a guide which serves as the basis by which the software is validated and a sample validation database. And, because FaciliWorks can incorporate calibration management, the corresponding Validation Kit supports both CMMS and calibration to meet requirements for single-track validation. Our on-site validation services streamline the process even further, guaranteeing documentation accuracy and minimizing downtime.

1-800-776-3090

+1 (480) 295-3465

FaciliWorks.com

 **FaciliWorks®**
Making Maintenance Manageable