FaciliWorks® 8i
Web-based CMMS Installation Guide
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Chapter One: Overview and System Requirements

Overview

Standardizing application setup will ensure consistency of results over time and across multiple systems. To achieve this consistency, each installation must be properly and efficiently characterized and its performance levels maintained.

This document will describe how system administrators can successfully install FaciliWorks 8i Server and create its database and provide basic information on how to optimize settings for the application to run smoothly.

System Requirements

Application Server

- Microsoft Windows Server OS: Standard, Enterprise or Datacenter Editions for versions 2008/2008R2 or 2012/2012R2 or 2016/2016R2; 32 or 64-bit
- Microsoft IIS 6, 7, 7.5 or 8, 8.5
- 300 MB free disk space for installation
- Pentium 4 - 2.4 GHz minimum processor
- 4 GB RAM minimum (4-8 GB recommended)
- Installed by FaciliWorks 8i setup if not pre-existing:
  » Microsoft .NET Framework 2.0.50727
  » Microsoft ASP.NET 2.0 AJAX Extension 1.0
- Updated to the latest Security and Windows Updates

Database Server

- Microsoft Windows Server OS: Standard, Enterprise or Datacenter Editions for versions 2008/2008R2 or 2012/2012R2 or 2016/2016R2; 32 or 64-bit
- Microsoft SQL Server 2012, 2014 or 2016; 32 or 64-bit. Please Note: Microsoft SQL Express versions are not supported.
  » Network Protocols: Named Pipes, TCP/IP
  » Microsoft SQL Server Native Client
  » Mixed mode authentication
  » Microsoft SQL Server Management Studio
- Pentium 4 - 2.4 GHz minimum processor
• 2 GB RAM minimum (4 GB recommended)
• Storage space: initial database starts at 50 MB; prepare for growth and backups (>10 GB recommended)

Note: The Application and Database Servers can reside on the same or separate machines.

Workstation

• Microsoft OS: Windows 7 (32 and 64 bit), Windows 8/8.1, Windows 10
• One of the following Web browsers: Microsoft Internet Explorer 10 or better, Mozilla Firefox 24 or better or Google Chrome 27 or better
• Pentium 4 - 1.4 GHz or higher recommended

Integration

• Capable of integrating with Windows Active Directory

Type of Installation

For a full installation of FaciliWorks, please see Chapter Four. If you have an older build of the current version of FaciliWorks already installed and you need to install a patch update, please see Chapter Six.
Chapter Two: Microsoft Windows Server

Installation of Web Server (IIS) Roles

In the left-hand pane of Server Manager, expand the server name if necessary and click Roles. In the right-hand pane, click Add Roles.

The Add Roles Wizard will open:

This wizard helps you install roles on this server. You determine which roles to install based on the tasks you want this server to perform, such as sharing documents or hosting a Web site.

Before you continue, verify that:

- The Administrator account has a strong password
- Network settings, such as static IP addresses, are configured
- The latest security updates from Windows Update are installed

If you have to complete any of the preceding steps, cancel the wizard, complete the steps, and then run the wizard again.

To continue, click Next.

Select Skip this page by default
Click **Next**.

In the next window, check the **Web Server (IIS)** checkbox:

Continue to click **Next** until you arrive at the **Select the role services to install for Web Server (IIS)** screen:
The following criteria are required for FaciliWorks 8i Server installation:

**Web Server**

- Common HTTP Features
  - Static Content
  - Default Document
  - Directory Browsing
  - HTTP Errors
  - HTTP Redirection (optional) - use this if you need to redirect to a different URL/IP Address to broadcast outside the network and/or to other site locations under different domains

- Application Development
  - ASP.NET
  - .NET Extensibility
  - ASP
  - ISAPI Extensions
  - ISAPI Filters

- Health and Diagnostics
  - HTTP Logging
  - Request Monitor
  - Security
  - Basic Authentication
  - Windows Authentication
  - Request Filtering

- Management Tools
  - IIS Management Console
After making the above selections, click **Next** to continue through the **IIS Wizard** until you reach the following screen:

Review the selections and then click **Install**, the Web Server (IIS) roles will be installed:
After installation, the following window will open:

Click **Close**. The server may require a restart to complete installation process; restart if prompted.
Chapter Three: SQL Server Manager

SQL Server Properties

Log into SQL Server Manager using SQL Server Authentication or Windows Authentication.

**Note:** SQL Server Authentication will be required during FaciliWorks setup.

![SQL Server Manager Interface](image)

Click **Connect**.

In the **Object Explorer** window, right-click the server name and select **Properties**.

![Object Explorer](image)
In the **Server Properties** window, select **Security** in the left-hand pane and then select **SQL Server and Windows Authentication mode** in the right-hand pane:

Click **OK** and you’ll be back to the **Object Explorer** window.
Adding a User Account

In the **Object Explorer** window, select the server name and expand **Security**. If there is a red X on the icon for the **sa** login, that means that the **sa** account is disabled per security restrictions, policies, etc. If that is the case, you will need to create a new account strictly for the FaciliWorks application. To do so, right-click **Logins** and select **New Login**.
The **Login - New** window will open. In the **Select a page** pane, select **General**.

1. **Login name** is required.

2. Select **SQL Server authentication**.

3. **Enforce password policy** (optional): checking this checkbox will require a password change before installing FaciliWorks. It’s recommended to uncheck **Enforce password policy** because the application will disconnect from the database and will require authentication at the login screen every time the password expires in SQL.

4. Enter a **Password** and then **Confirm password**.
5. In the **Select a page** pane, select **Server Roles**.

6. Check the **sysadmin** checkbox.

7. Click **OK** to finish; the **Login - New** window closes.

8. Back on the **Object Explorer** window, the new **FaciliWorks** user now displays under **Logins**.
9. Close out SQL Server Manager, reopen it and log in using the new account with SQL Authentication to verify that the account is active. (If **Enforce password policy** is enabled, you will be required to change your password before proceeding.)

If an error message similar to the following is produced after login attempt, restart SQL Server Service to make the changes take effect.
Configuring SQL Services Over Network

This portion of the document is to configure SQL Server to be viewed over the network using DNS instead of IP Address.

Click the Windows Start button and navigate to All Programs -> SQL Server “your version” -> Configuration Tools -> SQL Server Configuration Manager.

In the SQL Server Configuration Manager window, select SQL Server Services in the left-hand pane. In the right-hand pane, make sure that SQL Server, SQL Server Agent and SQL Server Browser display Running in the State column and Automatic in the Start Mode column:

![SQL Server Configuration Manager](image)

Note: CyberMetrics does not support or provide Technical Support for SQL Server Express due to data limitations and restrictions.

Next, in the left-hand pane, expand SQL Native Client and select Client Protocols. Set Shared Memory, TCP/IP and Named Pipes to Enabled:

![SQL Native Client Configuration](image)
The same method is applied to Protocols under SQL Server Network Configuration and Client Protocols under SQL Native Client:

<table>
<thead>
<tr>
<th>Protocol Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Memory</td>
<td>Enabled</td>
</tr>
<tr>
<td>Named Pipes</td>
<td>Enabled</td>
</tr>
<tr>
<td>TCP/IP</td>
<td>Enabled</td>
</tr>
<tr>
<td>VIA</td>
<td>Disabled</td>
</tr>
</tbody>
</table>

In the left-hand pane, select SQL Server Services; in the right-hand pane, right-click SQL Server (your version) and select Restart. Restarting will make the changes take effect.
Chapter Four: Full Installation of FaciliWorks

1. Insert your FaciliWorks installation media and double click the .exe file to open the menu. On the Installation screen, click FaciliWorks 8i to begin installation. If you have downloaded FaciliWorks from CyberMetrics’ site, locate and double click the Setup.exe file.

2. When the Installation Wizard starts, the Welcome screen will be displayed. To continue with installation, click Next.
3. You will be prompted to enter a **Product Key**, but you may skip this step and input the product key after the installation is complete. A 21 CFR Part 11 installation will require that this step be skipped; the product key will need to be entered after installation. The product key can be found within the FaciliWorks disk packaging. Click **Next**.

![FaciliWorks 8i v8.7 Enter Product Key](image)

Enter the 25-character Product Key. You will find this code on the sticker at the back of the CD case.

**Product Key**

![FaciliWorks 8i v8.7 Select Program Options](image)

Select the version of FaciliWorks 8i v8.7 database that will be installed.

- Standard Database
- 21 CFR Part 11 Compliant Database

If your company requires software to be 21 CFR Part 11 compliant, select that version of the database. If your company does not require this compliance or you are not sure, select the standard database.

![FaciliWorks 8i v8.7 Select Program Options](image)
5. In the following window, select **Default Web Site** and then click **Next**.

![FaciliWorks 8i v8.7](image)

Choose the web site where FaciliWorks 8i v8.7 will be installed

Setup will install FaciliWorks 8i v8.7 in the following web site.

To install into a new web site, select <New Web Site>.

To install in an existing web site, just type the web site name.

You can choose not to install FaciliWorks 8i v8.7 by clicking Cancel to exit Setup.

Select web site:
Default Web Site

Next  Cancel

6. Specify the **Virtual Directory Name**, for example: http://servername/sitename. The name entered here will be the one displayed in the IIS default website. After entering the desired name, click **Next**.

![FaciliWorks 8i v8.7](image)

Select Virtual Directory Name

Setup will install FaciliWorks 8i v8.7 in the following Virtual directory.

You can choose not to install FaciliWorks 8i v8.7 by clicking Cancel to exit Setup.

Virtual Directory Name:
sitename

Next  Cancel
7. In the **Choose Program Location** window, specify the folder in which the application will be installed. This determines the Inetpub folder of your IIS from which the application will be deployed. It is highly recommended that you install the application under the predetermined `\inetpub\wwwroot` destination to avoid page security access restrictions. To select a different destination, use the **Browse** button. After specifying a destination folder, click **Next**.

8. Select an SQL database option and then click **Next**.
9. In the Database Options window, select Application for a blank database (recommended) or select Sample for a sample database and then, click Next.

10. The Installation Wizard is now ready to begin installation. To proceed with installation, click Next.

11. When this screen appears, installation is almost finished. Click Next to start creating the database.
12. The **Database Creator** opens. Enter the applicable information and name the database.

You can rename the database if you choose, but be sure to apply the prefix of **PM_** as shown here:
13. Click **Test**. A successful connection will display the following window; click **OK**.

![Connection successful](image)

14. Back on the **Database Creator** window, click **Create**.

15. Upon successful creation of the database, a window similar to the following will be displayed; click **OK**.

![Database created successfully](image)

16. FaciliWorks has been successfully installed. Click **Finish** to exit the **Installation Wizard**.

17. Open Microsoft SQL Server Management Studio.

18. Log in with proper credentials to modify the database you just created with the installation setup of FaciliWorks.
19. In the Object Explorer window, expand Databases and locate the FaciliWorks database recently created. Right-click the FaciliWorks database and select Properties.

![Object Explorer](image)

20. The Database Properties window will open. Select Options in the left-hand pane and then in the Recovery Model field, select Simple.

![Database Properties](image)

Recovery Model:

**Simple:** No log backups. The database automatically reclaims the log space to keep space requirements small, essentially eliminating the need to manage the transaction log space.

**Full:** Requires log backups. No work is lost due to lost or damaged data files and can recover to an arbitrary point in time.

**Bulk Logged:** Requires log backups. Reduces log space usage by using minimal logging for most bulk operations.

NOTE: In FaciliWorks, we don’t need the transaction logs, they will take up a lot of space and just slow down the program as time goes by. A job needs to be created to back up the database based on the company’s policy or by following best practices. CyberMetrics Corporation doesn’t require recovery of databases by using the LOG file - only the most recent backup created.

21. In the Database Properties window, click OK to save the changes.
Chapter Five: Internet Information Services

The following steps are to maximize performance in the application.

1. Open IIS by clicking the Windows Start button and navigating to Administrative Tools -> Internet Information Services (IIS) Manager.

2. In IIS Manager, click Application Pools in the Connections pane.
3. In the **Application Pools** window, make sure the **Application Pool** is set to .NET Framework 2.0x for both the Web Site name and the application name (FaciliWorks).

![Application Pools](image1)

4. In the **Connections** pane, expand your server name, expand **Sites** and select **Default Web Site**. In the **IIS** section on the right, double click the **Default Document** icon.

![Internet Information Services (IIS) Manager](image2)
5. In the **Default Document** window, select `default.aspx` and then click **Move Up** in the **Actions** pane. The following message will display; click **Yes**.

6. Proceed to move `default.aspx` to the top:

7. Click on **Default Web Site** to return back to the **Internet Information Services (IIS) Manager** window.

8. In the **IIS** section on the right, double click the **Compression** icon.
9. In the Compression window, verify that the Enable static content compression checkbox is checked:

![Compression Window]

10. Return to the IIS Manager window and with Default Web Site selected on the left, double click the Logging icon:

![IIS Manager Window]
11. In the **Actions** pane of the **Logging** window, click **Disable**.

12. Return to **IIS Manager** and double click **Bindings**, the follow pop-up window will open:
13. Click the Add... button; the Add Site Binding window will open. Enter your server name in the Host name field and then click OK to close the window.

14. Back on the IIS Manager window, in the Actions pane, click Limits.
15. In the **Edit Web Site Limits** window, adjust the **Connection time-out** to your liking (this is the time-out frequency from the FaciliWorks application to the SQL Server - we recommended 36000 seconds). Click **OK**.

![Edit Web Site Limits](image1)

16. Return to **IIS Manager**. In the **Connections** pane, expand **Default Web Site** and select the FaciliWorks site name:

![Connections](image2)

17. In the **Actions** pane, select **Browse <your server name> on *:80**.
18. First-time browsing will take time due to application settings caching into server memory. Once the FaciliWorks site pulls up, you will see the URL link that you will be giving to your end users to access the application; the URL link will be based on your server name and application name. A dialog box will appear noting the expiration of the program in 30 days; click OK to close the message.

19. Enter Default in the User ID field, press the Tab key on your keyboard and enter 1234 in the Password field and click OK.

20. You are now logged into the program, navigate to the Utilities menu and select Modify License.

21. If you entered your Product Key during installation, it will be displayed here in the License Code field. If you skipped the that step during installation, enter the Product Key now in the License Code field. Click Save to register your software; this will require a re-login.
Your Product Key/License Code must be entered within 30 days; otherwise, the program will tell you that it has expired. To verify that there isn’t an expiration date on the program, log into FaciliWorks and click the About link in the top right-hand corner. Once you have successfully entered your Product Key/License Code, the Expiration Date field will be blank, as shown here:

![FaciliWorks Maintenance Manager 8.7](image)

**Standard Installation - Enterprise with Calibration**

MAINTENANCE MANAGEMENT SOFTWARE

For technical support call: (860) 295-3465  
E-mail: support@cybermetrics.com  
Web Site: www.cybermetrics.com

### License Information

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<thead>
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<tr>
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<td>5</td>
</tr>
<tr>
<td>Service Requests</td>
<td>5</td>
</tr>
<tr>
<td>Calibration</td>
<td>5</td>
</tr>
<tr>
<td>Expiration Date</td>
<td></td>
</tr>
</tbody>
</table>
Chapter Six: Installing a Patch Update

This portion of the document provides instruction on doing an in-version update to your FaciliWorks site.

Database Backup

Before updating your existing FaciliWorks site, first make sure to create a backup of your current database from SQL Server Manager. If you have already created a backup, skip to page 45.

1. Open SQL Server Manager and log in using your Windows or SQL authentication.

![SQL Server Manager Login](image)

2. Expand Databases and locate your FaciliWorks database:

![Database Location](image)
3. Right click on the database name, select **Tasks** and then select **Back Up**.
4. You can either keep the default location or change where you would like to store the backup:

![Backup Database - PM_siteupdate](image)

To keep the default location, click **OK**. To change the location, click **Remove**, click **Add** and then browse to the new destination location:

![Select Backup Destination](image)
5. Name your backup file with the extension of .bak. Click **OK** to continue.

6. The **Select Backup Destination** window now displays the new destination path; click **OK**.
7. In the **Back Up Database** window, click **OK** to start the backup.

8. Once the backup is complete, click **OK**.
Patch Update Installation

1. Note the current version and build number in the lower right corner of your FaciliWorks login page (this information may vary from the screenshot below):

![FaciliWorks Login Page]

2. On the web server, locate the FaciliWorks patch executable file and run it.

![FaciliWorks Patch File]
3. The **Welcome** screen will appear; click **Next**.

4. In the **Choose Program Location** window, click **Browse** to locate the web application if the default naming is not the same as the default web directory folder.
Navigate to the web application folder and click **OK**.

5. Click **Yes** to verify the path directory where you will install the update:
6. **Web Destination Folder** will now display the correct destination; click **Next**.

![FaciliWorks 8i Installation Guide](image1)

7. In the **Choose Website Backup Location** window, leave the **Do Not Backup** checkbox unchecked in order to create a website backup. You can change the default destination folder by clicking **Browse** and selecting a different location. Click **Next** and wait for the backup to complete.

![FaciliWorks 8i Installation Guide](image2)
8. Once the backup of application is complete, the installation will continue:

9. Click **Finish** to complete the installation:
10. Launch your FaciliWorks site. At the login page, you will be prompted to update the FaciliWorks database; click **OK**.

![Database Update Prompt](Image1)

11. Once the database update is complete, the FaciliWorks login page will display. In the lower right corner of the window, the new build number will be displayed (will vary from the screenshot below).

![New Build Number](Image2)
Updating Reports

Now that the patch update installation is complete and the database has been updated, the next step is to update the reports.

1. Click the Windows Start button and navigate to **All Programs -> FaciliWorks8i -> DTU 8.7 -> DTU8**.

2. In the **Data Transfer Utility Wizard** window, click **Next**:

3. In the next window, select the option to **Update Reports** and then click **Next**:
4. The Transfer Report Data window will open. Select your FaciliWorks SQL Server from the Server Name drop-down list (if your SQL Server is not in the list, you can manually enter the server name). The SQL Login window will now appear; enter proper SQL Server credentials:

5. Click OK on the SQL Login window and then in the Transfer Report Data window, make a selection from the Database Name drop-down list.

6. The list of reports available for update will populate. By default, the Action column will display Overwrite for all reports; however, for customized reports, change the Action to Skip. Click Transfer Data.

7. You will see a confirmation that reports have successfully transferred; click OK to close the confirmation window.

Chapter Seven: Installing Custom Report Designer

The Custom Report Designer (CRD2) executable must run on the client computer, not on a server.

1. Run the CRD2 executable file.
2. The FaciliWorks Custom Report Designer Installation wizard will display:

![FaciliWorks Custom Report Designer Installation screen](image)

3. Click **Next** to begin installation.
4. In the **Choose Program Location** window, if you would like to specify a particular destination, click **Browse**; otherwise, click **Next** to install the files in the default location.

![FaciliWorks Custom Report Designer Installation Choose Program Location](image)
5. You are now ready to install FaciliWorks Custom Report Designer; click Next in this window:

![Custom Report Designer installation window]

6. FaciliWorks Custom Report Designer has been successfully installed:

![Custom Report Designer installation success window]

7. Leave the Run Custom Report Designer checkbox checked and then click Finish. (To open the Custom Report Designer in the future, click the Windows Start button and then navigate to All Programs -> FaciliWorks 8i -> CRD 2.0 folder -> CRD 2.0 application).

8. The FaciliWorks Login window for Custom Report Designer will display:

![FaciliWorks Login window]
9. Replace [ServerName] and [FSW8iNET20] with the correct FaciliWorks URL, for example:

10. Click **Test** to test the connection to your FaciliWorks site; click **OK** to close the success confirmation message:

11. Enter your FaciliWorks User ID and Password and then click **OK**.
12. The **Custom Reports** window will display; you are now ready to begin creating and editing reports.
FaciliWorks 8i Mobile provides an extra layer of flexibility by allowing technicians to access, edit and close out PMs and work orders and enter 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, a 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.

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.

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.

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.

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.

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.

FaciliWorks, Making Maintenance Manageable

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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.