



# FACILIWORKS ESSENTIALS

**INTRO GUIDE**

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Local or outside US: +1 (480) 212-1257

Toll-free: 1-800-777-7020

M-F 8:00 a.m. to 5:00 p.m., MST

<https://faciliworks.com/support/>

Technical support cannot be provided unless the user has a current maintenance agreement.

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## TRAINING

Learn how to save time, avoid common mistakes and get the most out of your software with FaciliWorks Essentials training classes. We offer online, regional and on-site training. Please visit <https://faciliworks.com/training-schedule/> for detailed training information or contact us today at 1-800-776-3090 or [training@cybermetrics.com](mailto:training@cybermetrics.com) for more information.

# CHAPTER 1: OVERVIEW

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FaciliWorks Essentials gives you all the tools you need to effectively track all of your maintenance tasks, personnel, assets and supplies. It is designed to be used by maintenance managers, associated staff and contractors, as well as service requesters.

In FaciliWorks Essentials, asset records store identification, warranty and accounting information and associated maintenance tasks. Each maintenance task record contains information regarding its schedule, estimated and actual time, costs, labor, personnel and parts required as well as the check points required to inspect, measure, repair and replace asset components.

You can create detailed preventative or corrective work orders based on this information, coordinating the required items for each category with your available resources. You can print ad-hoc listings of all of your records and resources, filtered and sorted according to your preference. It's also easy to generate and keep track of the service requests that are part of each corrective maintenance task. Part consumption and reorder tools available in Essentials facilitate straightforward and simple inventory control.

Managers have access to useful Dashboard and KPI graphs which are available for quick comparisons of asset downtime, maintenance costs or inventory valuation, while other graphs allow staff to focus only on the tasks or service requests assigned to them.

FaciliWorks Essentials provides powerful forecasting tools such as the interactive calendar that shows the number of jobs and hours for each day of the month, along with a projected schedule of tasks and hours.

The program's popular table design allows each part of the maintenance management process to become an independent component. These components are then combined, forming building blocks for the solid construction of your maintenance management system. Once you have mastered the basics, you will find that FaciliWorks Essentials is a vital software tool for analyzing, budgeting and managing your maintenance program.

This guide will give you a look at how your company might use FaciliWorks Essentials on a typical day and will help you focus on entering basic data to get the software up and running quickly.

# CHAPTER 2: WHAT DOES FACILIWORKS DO?

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To answer this question, let's explore how your maintenance department might use the software on an average day. This story is meant to illustrate the features of FaciliWorks Essentials, not to dictate how you plan your work.

## A TYPICAL DAY IN THE MAINTENANCE DEPARTMENT

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It's Monday morning - time to plan the day. You pour your coffee, turn on your computer and launch FaciliWorks Essentials. The **Dashboard** is displayed, showing all of the preventative and corrective maintenance that's due.

Now it's time to organize the work for your maintenance crew. As the maintenance manager, you plan the week's schedule for your technicians. Thanks to FaciliWorks Essentials, it's easy to view the week's schedule of work orders and reassign the work as needed.

To avoid duplication of effort, you give your maintenance staff access to the software so that they can complete CMs and PMs and even create work orders on the fly while in the field. They will be able to view the entire program so they have access to the CM and PM records which include asset information, estimated labor hours, parts and test points that should be checked for each task. Now you're ready to send your technicians off to work.

Next, you want to view the PM events that have been assigned specifically to you, so you navigate to Edit PMs and apply a filter that shows only those open PM events that are assigned to your personnel ID.

Later in the morning, you check to see how the work is progressing. You look at the PM/CM calendar to see how many jobs are left for the day and how many hours have been scheduled for each one. You click on today's and tomorrow's dates on the calendar to view CMs, open service requests and PMs due on each day.

Now, the Receiving Department notifies you that they've received the new parts that you ordered. You enter the parts into the software so that they'll be available for work orders.

Next, you need to update the FaciliWorks Essentials database. Your company has acquired an additional piece of production equipment that is the same type as another piece of equipment that you already have. You use the Clone feature to copy the common information about this asset into a new asset record. When you clone the asset, all of its associated tasks and information, including test point checklists, labor, contract and part information are copied to the clone. All you have to do next is enter the asset's unique information, including the asset ID, serial number, purchase date and next date due for maintenance.

Throughout the day, employees in other departments have used the software to submit service requests. Because of the preferences you've set in FaciliWorks Essentials, you automatically receive an email notification alerting you that service requests have been created. You can immediately go into Edit Service Requests to approve, edit or delete them.

You can then enter more information about each request and create a corrective maintenance event directly from the service request record. Upon creating that event, FaciliWorks Essentials can automatically email the requester that a vendor has been requested to resolve the corrective maintenance event. Once that vendor has completed the work, the software automatically sends email notification to the requester that the work order has been completed.

As maintenance manager, you're responsible for budget and resource planning. You use the Projected PM Budget KPI on the Dashboard to help you plan ahead for parts and labor costs. You also run the KPI that shows on-time versus late PM completion and export the raw data from that KPI for analysis.

You're now on your way to a managers' meeting. You feel confident that everything in your department is under control and this data proves it. After the meeting, it's time to go home. As you leave, you try to remember what your workday was like before you had FaciliWorks Essentials. How did you ever manage?

## THE RESULT

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As you can see, using FaciliWorks and its accessories saved you a lot of time, effort and stress.

As soon as you started FaciliWorks, the Dashboard showed today's maintenance.

You gave your technicians access to the software in order to record work information in the field and each technician had thorough information for each task, including procedures.

The PM/CM Calendar made it easy for you to check on the status of each maintenance task without even leaving your desk. It also helped you see where labor bottlenecks occur and allows you to easily reschedule work.

Thanks to the Projected PM Budget KPI, you were able to allocate the necessary budget to perform the preventative maintenance that is coming due next quarter. Without FaciliWorks Essentials, this task would require much more time, effort and paperwork. You don't dread budget meetings anymore because you know you can easily retrieve any necessary information from the software, whether for a complex analysis or a quick overview.

The Clone feature also saved time. Without it, entering the new asset's information would have been redundant and time consuming. Also, because you didn't have to enter as much information, you were assured of more accurate and uniform data entry.

Thanks to email notification, you instantly knew when a maintenance request was made. And, because your company has a multi-user license of Web Service Requests, other employees could easily enter maintenance requests without leaving their desks or picking up the phone. After that, it was easy to create a work order directly from the request, without phone calls or excessive paperwork.

FaciliWorks Essentials' features helped you comply with your company's demands for high-quality, on-time maintenance.



# CHAPTER 3: USING FACILIWORKS

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## LAUNCHING FACILIWORKS

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1. In your Web browser, enter the URL in the address field and press Enter. The URL is provided by your IT personnel, Administrator or for hosted accounts, your FaciliWorks representative. The FaciliWorks Essentials **Log In** screen will appear.
2. Enter your **Organization Name**, **User ID** and **Password** and click **OK**.

## NAVIGATION

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Upon successful login, you are automatically directed to the Dashboard, a convenient summary of current corrective and preventative maintenance, service requests and inventory.

The Main Menu is the list of links along the left-hand side of the screen. Return to the Dashboard from any location within the software by clicking the **Dashboard** link at the top of the Main Menu.

At the bottom of the screen is the version and build of your software. If you need to call technical support, you will be asked for your version and build numbers.

## NAMING CONVENTIONS

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A primary key field is a field that contains unique values which are used to identify each record. This key identifier is used to establish appropriate relationships between the data tables. There are certain restrictions when entering data into the record ID fields:

- ID fields must not be blank.
- Enter a unique value for each record; ID values cannot be duplicated in another record.
- ID fields can contain letters, numbers and dashes (-). Avoid using / # \* ? ! ' [ ] or any other special characters in ID fields or other fields, as FaciliWorks considers them to be wildcard characters (wildcard characters help you search and filter records and set numbering formats). If you must use these characters, for example, Boiler #1, then you must put brackets around the wildcard character whenever you use it to filter records, i.e., Boiler [#] 1.

# CHAPTER 4: PERSONNEL AND SECURITY

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## PERSONNEL

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Navigate to **Personnel and Security -> Personnel**. Personnel in FaciliWorks Essentials can be anyone who will have a role in maintenance events or service requests or even contractors you may utilize. Personnel can be elevated to security users to gain access to your FaciliWorks Essentials application.

To add a new personnel record, click the + button, create a unique alphanumeric ID and then enter all necessary associated information. If not marked as **Active**, the employee/contractor will not appear for selection in relevant pop-up or drop-down lists in other forms where personnel can be assigned.

Use the **Category** field to classify your personnel; this required field differentiates between internal staff and external contractors. Personnel records that are designated as **Contractor** can also be linked to **Suppliers** in your database.

The **Hourly Rate** for personnel is used to calculate the cost of labor for maintenance based on actual hours worked (this calculated value will be visible on PM and CM records).

**Shift** is not required, but can be helpful later if you wish to filter and assign PM/CM records by shift.

## USER SECURITY

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Click the **User Security** tab of a personnel record to assign personnel to a security group and enable login. As it implies, this will grant access to this FaciliWorks Essentials application instance. An invitation email will be sent to the email address specified in the personnel record being elevated.

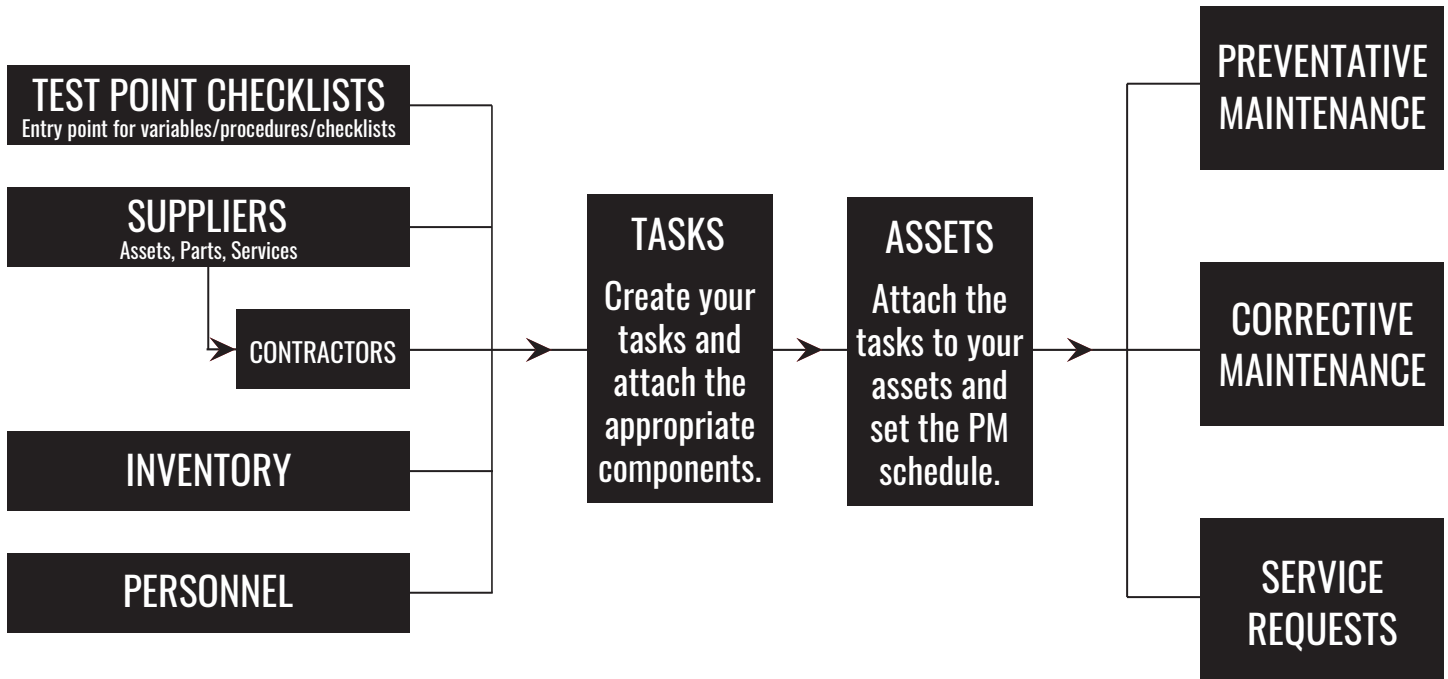
## RETIRED PERSONNEL

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As you create preventative and corrective maintenance and other historical records, personnel assigned to these records become part of that history. Therefore, personnel records cannot be deleted, but if you have personnel that have left the company or are no longer active, you can retire them. This way, they remain in the database history, but can no longer be associated with any other historical records and they are removed from the **Personnel** section. Retired personnel can be viewed and unretired by navigating to **Personnel and Security -> Retired Personnel**.

# CHAPTER 5: DATA ENTRY

The diagram below shows how records are arranged within FaciliWorks Essentials. Each asset may have one or more tasks that are performed on it for preventative maintenance; the task is comprised of a number of components needed to complete the task.



To help you quickly get started with FaciliWorks Essentials and to evaluate and use its major functions, this guide provides instructions for entering preventative maintenance information which includes asset and task information. To have the data available to create preventative and corrective maintenance easily and efficiently, it is best to follow a process. Start by entering all task component data. You can then associate the components to the task and the task can then be associated to the asset. When all information is entered for the asset, you can create preventative and corrective maintenance for the asset.

# TEST POINT CHECKLISTS

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Navigate to **Data Administration -> Test Point Checklists**. These records document specific steps that need to be performed or inspected during the course of a task. In addition to standard work instructions or procedures, these records can also include variable data. To add a new procedure record, click the **+** button. Once you enter a unique **ID** and a **Description**, click the **Save** icon. Now, click **Prefill** to add or prefill new test points.

Depending on your company's requirements, you can create a full procedure in a single step or you can create multiple separate steps within the checklist. In the case of frequently changing instructions (either from the manufacturer or your own SOPs), you could choose not enter instructions here and instead hyperlink to an outside document.

Depending on the **Type of Step**, you can require performer, reviewer or visual inspection acknowledgment and dictate whether or not a step should be performed after visual inspection. Personnel records include the specification as to whether or not a person is permitted to be a test point reviewer.

After creating the test point checklists and assigning them to tasks (within **Data Administration -> Tasks**), the associated tasks will populate the **Task List** tab here in the checklist area.

# SUPPLIERS

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Before you add data to assets or inventory, any vendor/supplier/contractor data needs to be entered in **Data Administration -> Suppliers**. To add a new supplier record, click the **+** button.

The supplier **ID** must be unique; the record will not be saved if this field is missing data.

Suppliers can be grouped into types for reporting purposes. Use the **Type** field to select an appropriate category for the supplier. If this is an active supplier, be sure to click the **Active** box to display **Yes**. Only active suppliers are usable in other forms.

**IMPORTANT:** If you are no longer doing business with a particular supplier, mark the supplier as inactive instead of deleting the supplier from your database. Deleting the supplier will cause a cascade deletion of all associated records that are attached to the supplier and will result in loss of information from your database.

# INVENTORY

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From the Main Menu, click **Inventory** and then select **Parts Entry**. To add a new part record, click the **+** button, create a unique **ID** for the part and then enter all necessary associated information. The options shown in the **Location** field are any assets that are categorized as facilities within the asset records. The software will automatically update quantities in stock based on quantities used for work events.

# TASKS

A task defines the preventative maintenance work performed on an asset. Any task that you enter in this form will be available for any asset when scheduling preventative maintenance.

From the Main Menu, click **Data Administration** and then select **Tasks**. To add a new task, click the **+** button. On the **PM Task Personnel** tab, you can assign a staff member by clicking the checkbox to the left of the name and then clicking the **Assign** icon in the center of the page.

ID	Name	Category	Craft Code	Shift
Adelie	Adelie G. Aspira	Staff		No Shift
User-0002	Ashely Horton	Staff		No Shift
<input checked="" type="checkbox"/>	User-0001	Staff		No Shift
<input type="checkbox"/>	MachTech-01-7432	Staff	Maint	No Shift
<input type="checkbox"/>	Elec-0000010000	Staff	Elect	No Shift

The **PM Task Parts** tab works the same way. Click the checkbox to select the desired part and then click the **Assign** icon to assign the part to the task.

In the **Test Point Checklists** tab, click the lower of the two **+** icons to select existing checklists (previously entered in **Data Administration -> Test Point Checklists**) to assign to the task:

Task

Information PM Task Frequency PM Task Personnel PM Task Parts **Test Point Checklists** Attachments

ID: Cleaning Maintenance Description: Monthly Cleaning

Test Point Checklists **+** 1 of 1

Test Point Checklist ID: General Cleaning Description: General Cleaning

Test Point Steps **Prefill** Step 1 of 1

Instructions: Require Performer Acknowledgment:  No

# ASSETS

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Now that task information has been entered, you are ready to associate the task to one or more assets.

The **Assets -> Information** tab provides for the input and storage of all information regarding your assets including maintenance scheduling and tracking. Assets include everything in your business that you need to test, replace or service at regular intervals based on either elapsed time or actual usage. This may include vehicles, machinery, buildings, individual components, fixtures, facilities and measurement instruments.

To add a new asset, click the **+** button. You must create a unique alphanumeric **ID** for each asset in order to store the record in your database. An asset's status must be **Active** in order for it to be included in scheduled preventative maintenance.

## ASSETS - ASSIGN PM TASKS

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Because tasks and their components are already in the database, you simply need to select tasks for this asset on the **Assign PM Tasks** tab. Select an **Unassigned Task** and then click the **Assign** button. Modifications specific to this asset can be made to these components now that the task is attached to the asset.

## ASSETS - PARTS LIST

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In this tab, part information associated with this task has been auto-filled. You can delete parts that are unnecessary for this particular asset and you can add other parts from the database when needed.

# CHAPTER 6: PREVENTATIVE MAINTENANCE

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Once you have developed an asset-task record and set a schedule for it, FaciliWorks will generate a notification that a PM can be created. Depending on your configuration settings, you can retain control of PM creation or you can set up the system to automatically create them based on a defined frequency.

## MANUAL CREATE PM

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If an asset is due for maintenance within the specified number of days into the future (selected in **PM -> Manual Create PM**), the asset will be listed here. Only assets marked as Active in the **Status** field will be included in this list. If the PM is overdue, the **Due Date** field is flagged in red.

To manually create a PM, click the checkbox to the left of the **Asset ID** and then click **Create PM**. To manually create PMs for all assets in the list, click the **Select All** checkbox at the top of the checkbox column. This will check all checkboxes. Then, click the **Create PM** button.

## EDIT PM

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Once a PM has been created, navigate to **Preventative Maintenance -> Edit PMs** to modify, delete or add information to the record.

## COMPLETING PM

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When the work for a PM order has been completed, go to **Edit PMs** and select the appropriate record. Enter any necessary information on the various tabs and then go to the **Summary** tab and enter the **Completion Date**. The **Status** below the date will auto-fill with Completed, but this value can be changed (see Skipping PM). FaciliWorks will prompt you to enter any required information that is missing.

## SKIPPING PM

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If the work for a PM order has not been completed, but the PM record must be bypassed to keep maintenance on schedule, then the PM must be skipped. To do so, enter the current date in the **Completion Date** field and then select Skipped from the **Status** field.

# CHAPTER 7: CORRECTIVE MAINTENANCE

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## CM MANAGER

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If a CM was created from a service request or created on the fly by a member of the maintenance staff, it will be available within **CM -> CM Manager** and will include all previously entered information that applies. Access each component tab to complete the record.

## CREATING CM

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To create a work order from scratch, navigate to the **CM -> CM Manager** and click **+**. It is beneficial to use the **Problem Code, Cause** and **Action Taken** fields to better categorize the corrective work that's been performed.

## COMPLETING CM

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When the work for a CM order has been completed, go to the **Summary** tab and enter the **Completion Date**. The **Status** below the date will auto-fill with Completed.



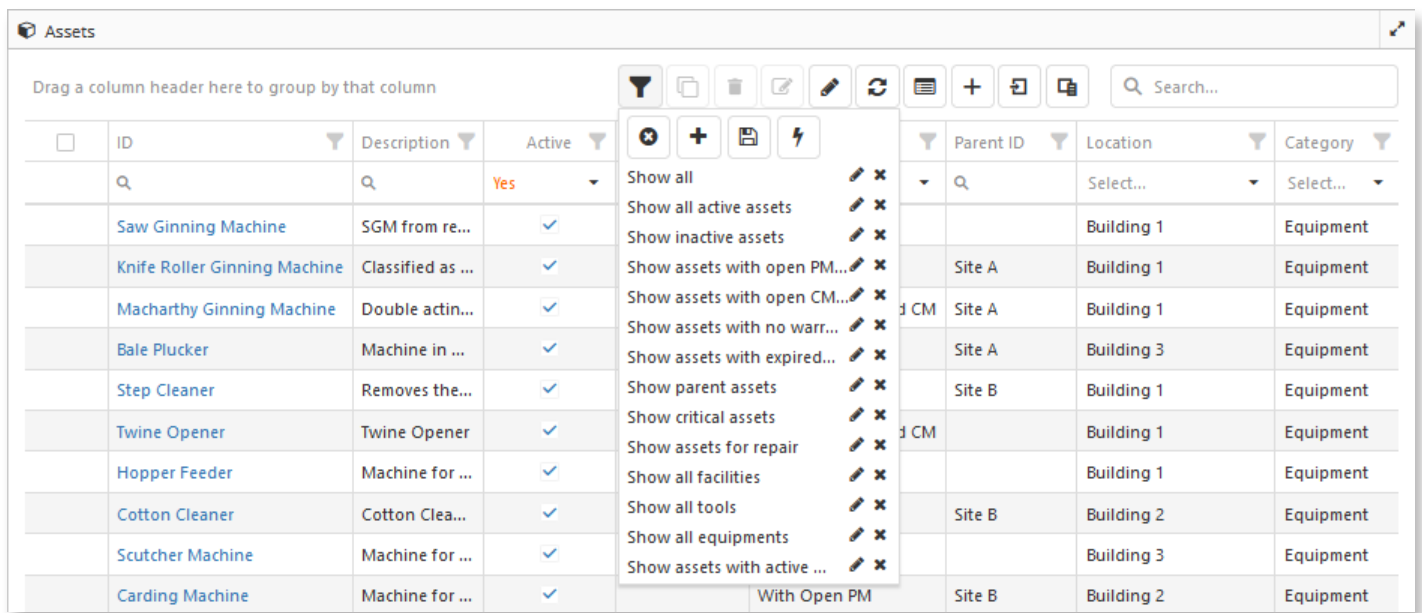
# CHAPTER 8: AD-HOC REPORTING & KPIS

## AD-HOC REPORTING

FaciliWorks Essentials provides convenient and efficient ad-hoc reporting from any data entry point.

Use the larger filter icon at the top of the window to select from several common data filters or use the smaller filter icons in each column to set your own filters. In the second row of the data view, you can search for specific records or make selections as to which type of data you would like to view, for instance, showing only active assets (see the **Active** column in the image below).

After applying your desired criteria, click the **Export** icon and choose to either export the data into Excel or as a **Report Listing**, which is a formatted report.



The screenshot shows the 'Assets' table in FaciliWorks Essentials. The table has columns for ID, Description, Active, Parent ID, Location, and Category. A filter menu is open over the 'Active' column, showing options like 'Show all', 'Show all active assets', 'Show inactive assets', etc. The 'Active' column is currently set to 'Yes'.

ID	Description	Active	Parent ID	Location	Category
?	?	Yes	?	Select...	Select...
Saw Ginning Machine	SGM from re...	✓		Building 1	Equipment
Knife Roller Ginning Machine	Classified as ...	✓	Site A	Building 1	Equipment
Macharthy Ginning Machine	Double actin...	✓	3 CM Site A	Building 1	Equipment
Bale Plucker	Machine in ...	✓	Site A	Building 3	Equipment
Step Cleaner	Removes the...	✓	Site B	Building 1	Equipment
Twine Opener	Twine Opener	✓	3 CM	Building 1	Equipment
Hopper Feeder	Machine for ...	✓		Building 1	Equipment
Cotton Cleaner	Cotton Clea...	✓	Site B	Building 2	Equipment
Scutcher Machine	Machine for ...	✓		Building 3	Equipment
Carding Machine	Machine for ...	✓	With Open PM Site B	Building 2	Equipment

## KPIs

FaciliWorks Essentials provides seven KPI (Key Performance Indicator) charts in **Dashboard -> KPI Center** that will help you monitor your team's effectiveness and achieve your goals. The style of each chart can be changed to suit your preference.

Each chart can be filtered and the raw data can be exported to Excel for manipulation outside of FaciliWorks Essentials. You can also collapse a chart or view it in full screen. All of these functions are accessible via the icons in the upper right corner of each chart.

# CHAPTER 9: TRAINING & TECH SUPPORT

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One of the most important aspects of a CMMS implementation is proper, comprehensive training. All too often, CMMS training budgets are minimal or non-existent, which results in the accrual of more costs due to errors made by untrained personnel. Formal training ensures consistent data entry by all users and proper use of the software in daily operation, as it pertains to the users' specific roles in your maintenance department. Software is simply a tool to be utilized in maintenance management; the real investment lies with the software users and training them on the proper use of that tool. Without it, the software could become a misused or unused tool, resulting in a reduction of ROI.

A variety of convenient and effective training options are available to fit your needs: online, regional and on-site training. Please visit <https://faciliworks.com/training-schedule/> for detailed training information or contact us today at 1-800-776-3090 or [training@cybermetrics.com](mailto:training@cybermetrics.com) for more information.

If you have any technical issues with the software, please contact Tech Support at 1-800-776-3090 or through our website at <https://faciliworks.com/support/>.