

FACILIWORKS

NEWSLETTER

January 2022

NEW FREE WEBINARS

Please join us for these free webinars to get to know the new FaciliWorks Essentials software and at the same time, share your ideas and opinions so we can make FaciliWorks work best for you.

FDA COMPLIANCE

Thursday, January 6, 2022, 3:00 PM - 4:00 PM EST

[MORE INFO AND REGISTER](#)

GET HELP WITH JUST A HOVER

Thursday, January 13, 2022, 3:00 PM - 3:45 PM EST

[MORE INFO AND REGISTER](#)



Week of Jan. 10

Session 1: January 10
Session 2: January 11
Session 3: January 12
Session 4: January 13
Session 5: January 14

Week of Jan. 17

Session 1: January 17
Session 2: January 18
Session 3: January 19
Session 4: January 20
Session 5: January 21

Week of Jan. 24

Session 1: January 24
Session 2: January 25
Session 3: January 26
Session 4: January 27
Session 5: January 28

To register for any of these sessions or for info about custom training options, please contact our Training Specialist at 1-800-776-3090 ext. 134 or training@cybermetrics.com.

SESSION DETAILS AND FULL TRAINING SCHEDULE

TECH TIP



Quickly Locate Data with Custom Filters in Data Entry Screens

In FaciliWorks 8i, every data entry form has a Quick Filter that allows you to quickly locate the records you need. The default fields in the Quick Filter might not be exactly what you want right off the bat, but it's quick and easy to define your own filter fields.

In the **Data Administration** -> **Assets** form, click the **Quick Filter** icon:



The default fields in the Quick Filter are **Asset Description**, **Asset ID**, **Asset No**, **Asset Warranty**, **Priority** and **Status**, though these may differ depending on your software version. To customize

which fields are presented here, complete the following steps. You must have administrator rights.

Navigate to the **Configuration -> Admin Settings -> Advanced** tab and locate the **Entry Form** area.

In this example, we want to change the Quick Filter for Assets, so click the **Define Pre-filter** link that corresponds to the Assets form:

Entry Form	
Approve Service Requests	Define Pre-filter
Asset Grouping Entry	Define Pre-filter
Asset Parent Child History	Define Pre-filter
Asset Status	Define Pre-filter
Assets	Define Pre-filter
Audit Log	Define Pre-filter
Batch Complete PM	Define Pre-filter
Budget Entry	Define Pre-filter
Budget Entry with Components	Define Pre-filter

The ensuing window displays the list of all fields available for the Quick Filter (cropped here for size). Check the checkbox that corresponds to each field you want; uncheck fields you do not want. Please note that if you are using FaciliWorks 8i with Calibration, this list will include fields for gage records as well as asset records.

Pre-Filter criteria for Assets	
Select Criteria	Fields
<input checked="" type="checkbox"/>	Asset Description
<input checked="" type="checkbox"/>	Asset Grouping
<input type="checkbox"/>	Asset History
<input checked="" type="checkbox"/>	Asset ID
<input checked="" type="checkbox"/>	Asset No
<input type="checkbox"/>	Asset S/N
<input checked="" type="checkbox"/>	Asset Type
<input type="checkbox"/>	Asset User 1
<input type="checkbox"/>	Asset User 2

Scroll to the bottom of the screen and click **Save**; close the **Pre-filter Criteria for Assets** window and you are returned to the **Advanced** tab.

Navigate back to the **Assets -> Information** tab and click the **Quick Filter** icon. The filter window opens and now displays your selected fields.

Find Records that match these criteria	
Asset Description	<input type="text"/>
Asset Grouping	<input type="text"/>
Asset ID	<input type="text"/>
Asset No	<input type="text"/>
Asset Type	<input type="text"/>

If so desired, you can have FaciliWorks 8i automatically display the Quick Filter (as opposed to displaying the records) when opening a data entry point, like **Assets**. To do this, navigate to **Configuration -> Global Settings** and in the **Form Options** section, select **Use Pre-filter** for the appropriate form:

Form Options

Do not use Pre-Filter ▼	Approve Service Requests	Form View ▼
Do not use Pre-Filter ▼	Asset Grouping Entry	Form View ▼
Do not use Pre-Filter ▼	Asset Status	Form View ▼
Do not use Pre-Filter ▼	Assets	Form View ▼
Use Pre-Filter	Batch Complete PM	Form View ▼
Do not use Pre-Filter		

Save your changes.

We encourage you to explore the additional capabilities of your FaciliWorks software and as always, keep an eye out for future Tech Tips.

[OUR COMPANY](#) | [CONTACT US](#)

