FaciliWorks® 8i

Mobile CMMS Quick Start Guide

CyberMetrics®

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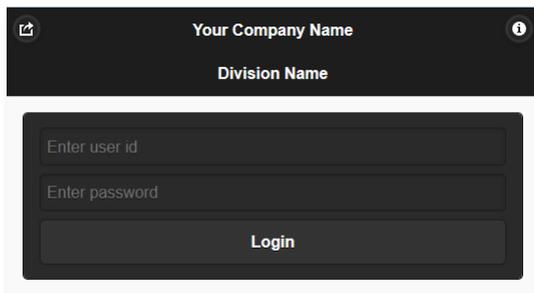
Note: From this screen, if you require the full FaciliWorks 8i Web application, tap the **Full Site** icon in the upper left corner of the mobile screen: 　. For information about FaciliWorks 8i Mobile such as version number and technical support contacts, tap the **About** icon in the upper right corner: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

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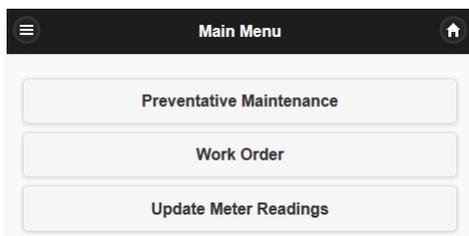
Tap the **Navigation** icon to reveal the left navigation menu. From the Main Menu (Home), the following options are available:

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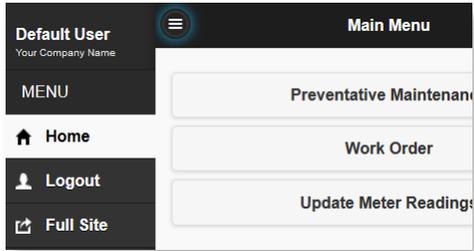
Filtering Records

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)

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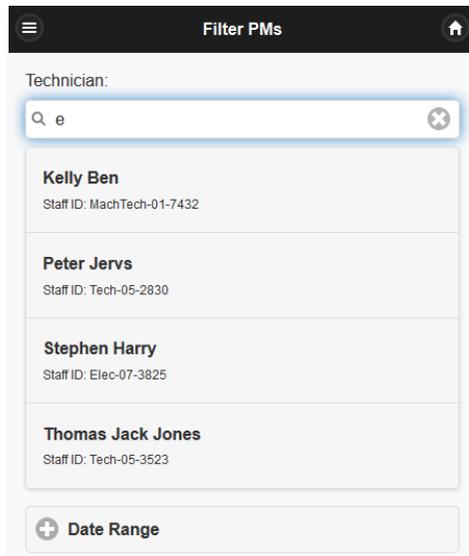
If you wanted to find Stephen Harry, for instance, you'd see his name as an option immediately after typing just an **s**. As you continue to type his name, the list is reduced, making data retrieval very efficient on a mobile device:
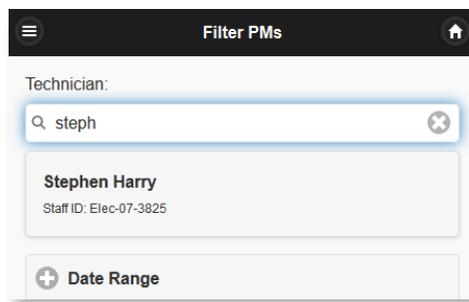

To view PMs assigned to Stephen Harry, for instance, you'd tap his name, tap **Open** (for open PMs), **Closed** (for closed PMs) or **All** (for all PMs) and then tap **Search**.

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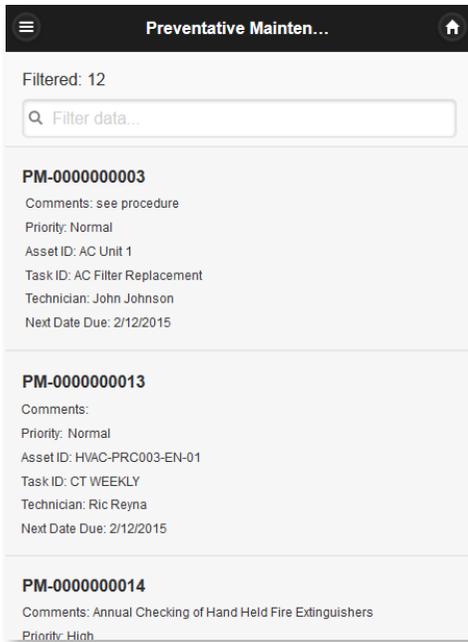
To further reduce this filtered list for PMs of high priority, for instance, simply type **high** in the **Filter Data** field:
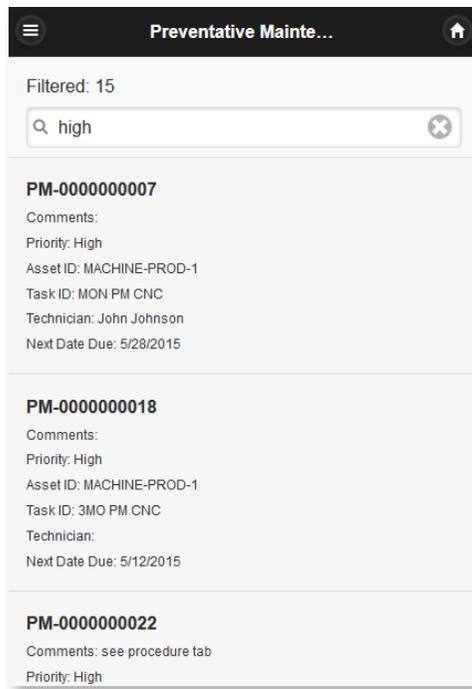
Completing a PM

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

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

- Labor

- Contracts

- Parts

- Tools

- Variables

- Procedures
- Checklist
- Signature

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:
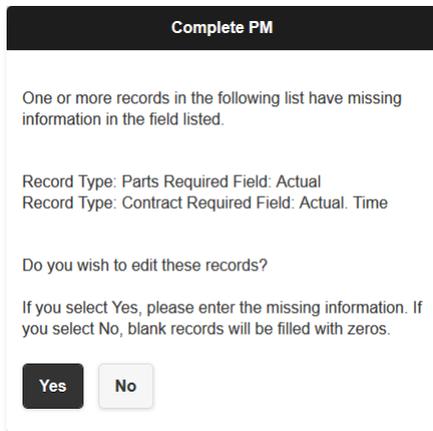
Complete PM

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.
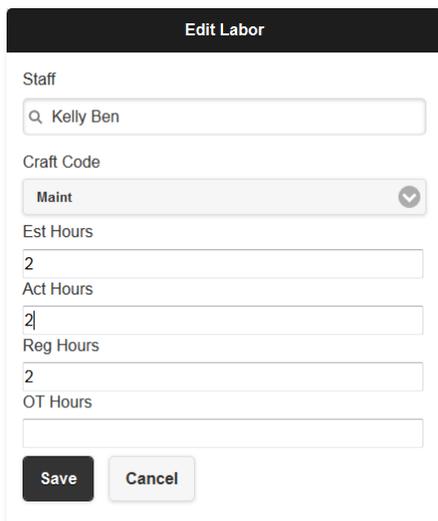
Edit Labor

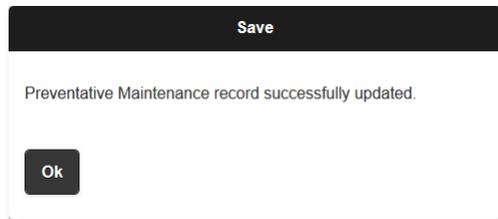Staff

🔍 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:

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**:

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:

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.

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

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

It gets even better.

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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.
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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.

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