



CMMS Basics & Beyond

How to get the most out
of your maintenance
management system

A Guide by Hippo CMMS, Maintenance Solutions Experts



Part 2

CMMS Purchase and Set Up

Understanding the Next Steps

After you've chosen a CMMS with the right mix of features, functionality and one that coincides nicely with your budget, you're ready to start building your database. The data integration process starts with importing the most important data first, which is typically your asset information. Once you have your equipment data added in, you then add users and requesters as necessary. Having both equipment and user data in first, will allow you to start using your system to submit and respond to work orders. Depending on your CMMS goals, the next step is to build up your database with preventive maintenance or scheduled work orders. At this point, the foundation of your database has been built and the next data additions are simply icing on the cake, adding more details such as images, documents, and asset info to make your database more and more robust and comprehensive as you go.



Pro Tip #5

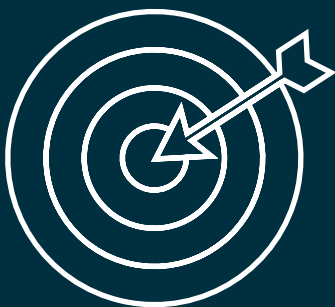
Start simple and build up. In order to get your account up and running quickly, we encourage our clients to start small by inputting some data such as asset names and user info first, then slowly add details to these assets over time. Give yourself data input goals such as plugging in 5 new PM's a week so you can stay on track. By not overwhelming your workload at the beginning and adding data in order of importance, you can start tracking info and submitting work orders much more quickly.

Deciding the right direction to take to properly integrate your system into your business process may seem simple at first. However, with varying degrees of support services that you can purchase and a variety of factors that may affect the successful outcome of your setup, this process may be more difficult than formerly thought. Without giving enough thought to setup, organizations may find themselves unable to get their system off the ground, a key factor in CMMS failure. Many clients don't understand the work involved in first setting up a system properly and then integrating it into their daily business processes. potential pitfalls await organizations who haven't supplied a generous budget to integration, who haven't dedicated an internal staff resource to oversee the setup process, and who haven't solidified a reasonable implementation timeline.

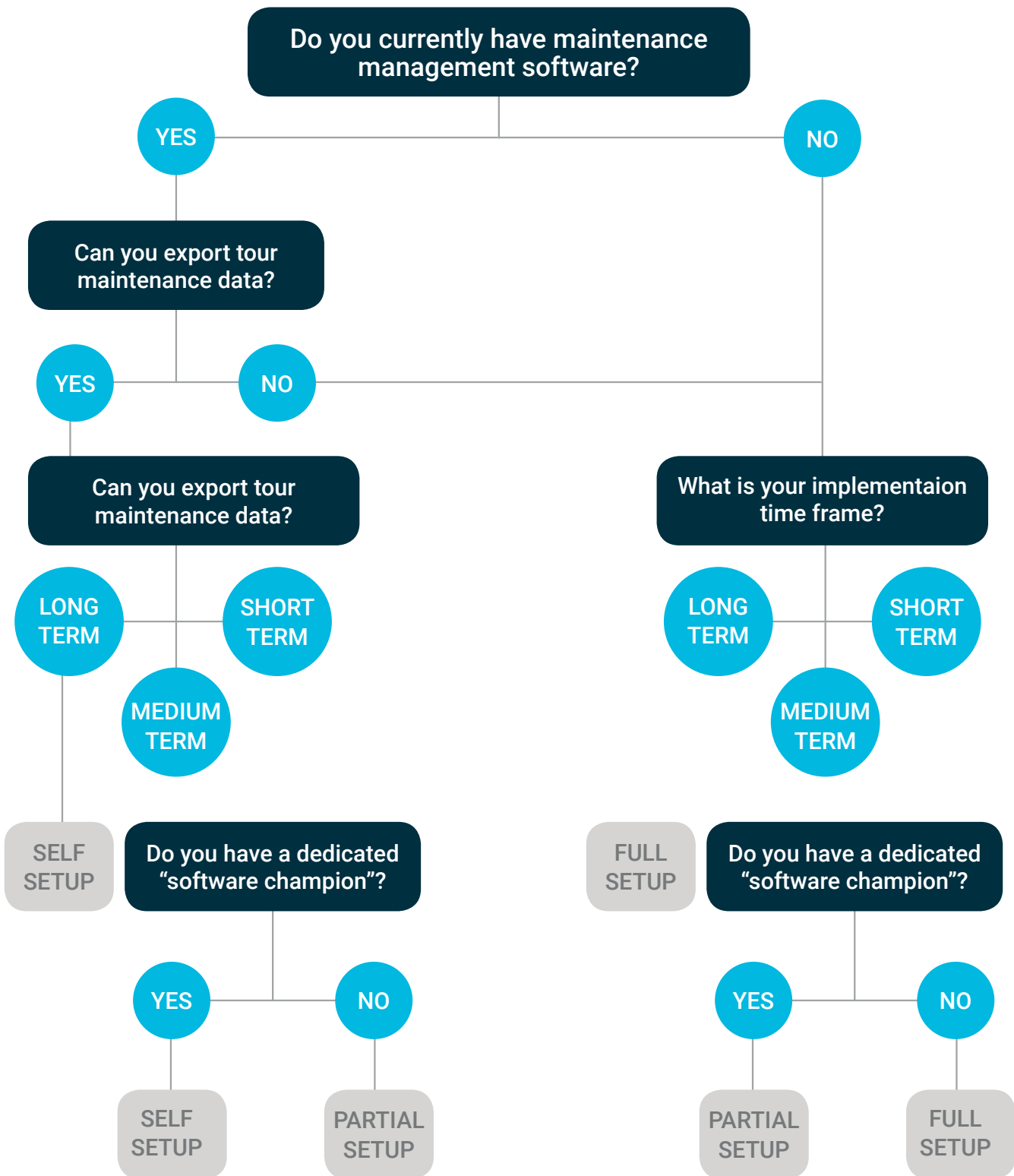


Determining Your Setup Type

We've devised a simple flow chart to determine the best course of action to get your system up and running quickly, whether it be completing your own setup, investing in partial setup or investing in a full on site audit. Once you've completed this exercise, read on to learn more about the chart items.



Learn what to expect during the integration process and identify the type of setup that matches your organization's profile in the next sections.



Setup Types (Applies to dark boxes on flow chart)

There are three different types of setup; self-setup, partial service setup, and full service setup. The differences stem from the amount of work that the organization must do versus the work a vendor must do to setup a software system.

a | Self-Setup: This option puts all onus on the organization to complete its database setup. This includes itemizing lists of equipment, assets, inventory, parts, PM's, and users to then be imported into the system. Any asset info wanted to be tracked including asset IDs, images, and documents must then be added to the system and associated with the asset in question. Users with their respective permissions and contact info, interface customization, and lastly work order templates are then added to the system.

Responsibility: Solely Business

Cost: Free – included in license fee/ account activation fee

Timeframe: 3-6 months (depending on four factors listed in next section)

b | Partial Service Setup: Partial service splits the responsibility of setup between the business and the vendor. In this case, the business is usually asked to fill out standard spreadsheet templates that the vendor provides them with. After lists of equipment, assets, inventory, parts, PM's, and users are collected and noted on these forms, the business then sends them to the vendor. The vendor inputs all data into the system, cleans these lists as necessary, notes missing information, and then associates assets with corresponding asset info. If your business requires account customization or special software navigation, the vendor will create and link up these items for you.

Responsibility: Business and Vendor

Cost: \$150 /hr.- \$250/hr. (depending on vendor rates and amount of data)

Timeframe: 3 business days- 2 weeks (starts from the time business submits spreadsheets and is dependent on extent of customization)

c | Full Service Setup: Full service puts the onus on the vendor to complete all setup tasks. This implementation type usually refers to an on-site audit in which a vendor rep visits your facility(s) and takes complete stock of your assets and equipment, asset info and their locations. They then add all info to your account, create account customization and provide the business with login credentials. The vendor may need to ask the business questions regarding their account setup, but all work is initiated and completed by the vendor.

Responsibility: Solely vendor

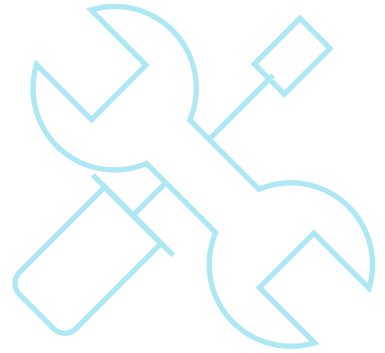
Cost: \$1,500- \$20,000+ (depending on vendor rates and amount of data)

Timeframe: 7 business days- 1 month (is dependent on size of facility to audit and extent of customization)

Factors Affecting Setup Type (Applies to blue questions in flowchart)

Existing maintenance management software

Simply put, if you already have maintenance management software and are looking to switch to a different vendor, a lot of the setup work may already be done for you. Your team will have less of a hurdle during the initial setup of your new database, and integrating software processes into their daily business lives. This will come in handy during Part 3- rollout. For now, the primary question you need to ask yourself is “does this current system allow you to export your data?”. If the answer is yes, then you’re in luck! Your setup just got a whole lot simpler and your maintenance history tracking just became much more extensive. By migrating maintenance history data from an old system into a new one, you will have seamless and consistent tracking from the beginning of time instead of losing your data during the switch. In addition to maintenance history, lists of assets and equipment, users, inventory and spare parts, and work order templates can typically be migrated from the old software into the new one. Your vendor’s support team can help you clean up and import your data, making this process much simpler.



Pro Tip #6

Whatever you put into the system, you get out. Although software helps to automate an otherwise manual process, it still relies on people to input accurate data on a frequent basis. If you don’t setup your account properly you won’t be able to realize all of the benefits that maintenance management software has to offer. It may take time to gather all data needed to be tracked, but it will be well worth it once you begin to use the system.

If your current system does not allow you to extract your data then you may have a little more work ahead of you, which is where vendor support staff comes into play. Perhaps you have kept old spreadsheets with asset and equipment info listed or perhaps your current vendor can pull info from your old database. If all else fails you can at least use your old account as a guide to setup your new one, showing you the equipment or assets that you used to track and copying them into your new database. Full or partial setup service is recommended at this point to get you up and running quickly and correctly.



Integration Budget

As stated in Part 1, make sure you leave room in your budget for integration fees. Hourly import fees can run anywhere from \$150/ hr. to \$250/ hr. depending on the vendor, while others may include this fee in the license or eat the cost altogether. On site audits have a wide pricing range as they usually add a per diem for travel and food expenses and they base the price on the number of assets involved in the audit. \$1,000- \$3,000 per day gives you an idea of an audit price point. Regardless of which setup route you take, we strongly recommend that you opt for some help in setting up your system, meaning that you will need to budget at least in part for these services.



Implementation Timeframe

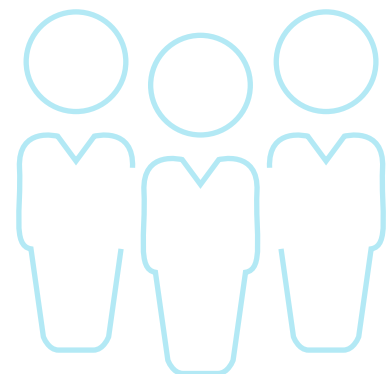
You can view your implementation timeframe in three distinct periods, short term (1-3 months), medium term (3-6 months), and long term (6 months- 1 year). If you're not in a rush to get this new system off the ground, then you may have more time to slowly and steadily set it up yourself. You can take your time grooming your lists to import,

conducting your own audit using internal staff, and getting feedback from fellow team members on the kind of permissions they require or the assets they would like to track. If you need your system up and running more quickly, then it might make more sense to hire a professional to get the job done for you. With their expertise in the industry and ease of use with their own product, vendors can conduct full audits and setup your account within a month or less.



Dedicated Internal Resource

A dedicated internal staff member should be appointed as the go to contact person for setup and ongoing system support. This person should be one who will regularly use the system and who can diffuse new info to their team of software users. This “software champion” can help to setup the new system by gathering asset info, filling out import spreadsheets, and integrating this info with the software. Some organizations utilize the skills of a third party software consultant to help properly research a new system and set it up. Other organizations task summer interns or trainees to setup the system, making this a large ongoing project for the duration of their contract. This temporary hire could make sense as the initial setup contact, but make sure this champion has successfully relayed their knowledge to the rest of the team who will be using the system on an ongoing basis. If you have a designated staff champion on your team with the mandate to set up your system, databases can get up and running much more quickly than those who don’t make this a priority in the maintenance department.



Key takeaways

Needs Assessment

- There are three types of implementation, each with varying responsibilities, costs and timeframes:
 - a. Self-Setup:** Conduct all your own setup including data collection, import, and account customization.
Responsibility: Solely Business
COST: Free- included in license fee/account activation
Timeframe: 3 -6 months (depending on four factors)
 - b. Partial Service:** A group effort performed by both the vendor and the company. A vendor typically sends the company spreadsheets to fill out with asset info and then send back to the vendor who will import the data and setup the account.
Responsibility: Business and Vendor
COST: \$150 /hr.- \$250/hr. (depending on vendor rates and amount of data)
Timeframe: 3 business days- 2 weeks (starts from the time business submits spreadsheets and is dependent on extent of customization)
 - c. Full Service:** All setup tasks are initiated and completed by the vendor with little to no input from the company.
Responsibility: Solely vendor
COST: \$1,500- \$20,000+ (depending on vendor rates and amount of data)
Timeframe: 7 business days- 1 month (is dependent on size of facility to audit and extent of customization)
- Determine your setup type based on the following factors
 - a. Existing maintenance management software:** Existing maintenance management software: If you can extract your existing data, you can simply transfer it to your new system and never lose any of your maintenance tracking. If not, you can use your old system as a guide to build the new one.
 - b. Integration Budget:** How much money have you allocated in your budget towards setup and integration? You can either pay someone to setup or save money and do it yourself.
 - c. Implementation Timeframe:** If setup is a long-term project, then you can complete this in house over a longer timeframe. If you want your system up and running quickly then you may need to hire your vendor to do the work for you.
 - d. Dedicated Internal Resource:** Appoint a software champion to be your go to internal staff member charged with setup tasks. Setup is quicker with a champion around.

Get your free copy of
Parts 2, 3, and 4 of
this series at
www.hippocmms.com

About Hippo CMMS

Hippo CMMS is a powerful, user friendly web-based maintenance management system. Its flexible platform includes all the CMMS features required to streamline maintenance operations of any size in a variety of industries; healthcare, manufacturing, retail, hotels, college campuses and more. Hippo makes the complex simple with its easy to use interface, unlimited users and lifetime customer support.

Contact Hippo CMMS for information about the software or a live demo.

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