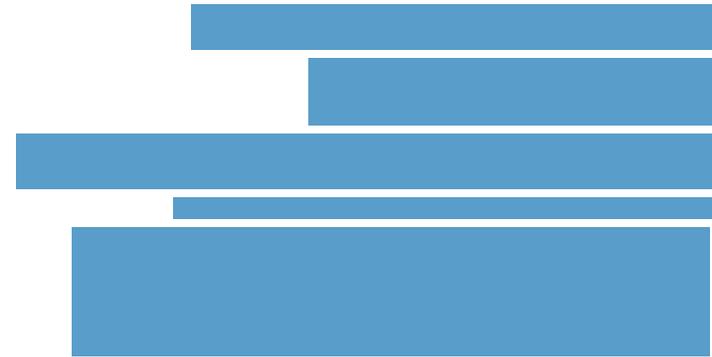


CMMS Guide

A Definitive Guide to CMMS & How
to Use It To Maximize Efficiency

TABLE OF CONTENTS

PART 1: WHAT IS A CMMS-----	3
A Brief History of CMMS -----	3
The Flexibility of CMMS Software-----	5
PART 2: HOW TO USE A CMMS-----	6
Tools a CMMS Offers -----	6
Using a CMMS Across Industries -----	8
PART 3: MAINTENANCE MANAGEMENT SOFTWARE TIPS AND TRICKS-----	10
Work Order Tips and Tricks -----	11
Asset Tips and Tricks -----	11
PART 4: THE MAINTENANCE CARE CMMS-----	12



WHAT IS A CMMS?

At its core, a CMMS is defined as a Computerized Maintenance Management System (or Software). Simply put, it's a system that allows maintenance and facility managers to organize and track everything from work orders to inventory and asset tracking and reporting. The goal of having a CMMS as part of your maintenance management plan is to simplify and streamline your workflow.

Understanding what a CMMS is and how they have evolved throughout history will help you as you implement a maintenance strategy within your business. Knowing that you have access to tools that will help you control your maintenance protocols and track your assets will free you to focus on growing your business.



A Brief History of CMMS

Historically, facility managers would use a variety of calendars and carbon copy documents to create an efficient workflow. While these tools allowed them to manage their maintenance teams, they relied heavily on the supervisors to document and track all aspects of facility management.

It was common for workers to misplace or even damage work orders and updating calendars was a tedious task that was labor intensive. Three-ring binders would be overflowing with manuals, inspection reports, and warranties. It's easy to see how the development of a CMMS software would alleviate countless headaches and simplify the jobs of maintenance managers.

The First Maintenance Management Systems

The first CMMS came online more than thirty years ago. These systems were hosted on monster-sized servers that were cost-prohibitive for most businesses. The focus of these systems was to create work orders, preventative maintenance, inventory control, and equipment history.

As technology advanced, the functionality of CMMS began to improve, even becoming specialized. For example, CMMS programs began to be developed for specific asset classes, plant equipment, and even infrastructure such as roads and piping. While the software was helpful, it had one major flaw: it was only able to track a single facility. If you managed multiple buildings across the state or even country you would have to have a CMMS for each facility.

A Brief History of CMMS

What is CMMS like Today

By the 1990s CMMS software had advanced to allow for added functionality and features. Companies started by adding security and alert systems for better workflow and these upgrades continued as computer technology improved. With the advent of the internet, companies were able to create integrated systems that could communicate across the globe. Now the one roadblock to making CMMS software readily accessible and usable had been removed.

Fast-forward to the twenty-first century and CMMS programs are continuing to improve as technology advances. Today, facility managers and team members can access work order systems, preventive maintenance software, and parts and inventory

management software from their cellphones. Along with better features and easier accessibility, CMMS has morphed into an essential tool for anyone responsible for inventory management, work orders, maintenance schedules, and more.

THE FLEXIBILITY OF CMMS SOFTWARE

As CMMS systems have evolved throughout the decades, their functionality has also increased. For example, one CMMS can work for a company with multiple locations across the globe. The software can also be used across a wide berth of industries, allowing managers to maintain their facilities as they see fit.

Here are some examples of how industries have adapted CMMS system to fit their needs:

Healthcare Facility Management:

Hospitals, clinics, nursing homes, and other healthcare facilities will use CMMS not only to maintain their buildings, but they also use it to support government compliance. Healthcare facilities are highly regulated and dropping the ball on any of a number of maintenance tasks can put the lives of patients at risk.

Property Management: Property managers can use the work order system across multiple buildings and locations. They can track assets and maintain maintenance records that can be used when buying and selling additional properties. Property managers are also able to schedule out inspections helping them save time for their maintenance teams.

The Flexibility of CMMS Software

Government Facility Maintenance:

Government buildings are highly regulated and require strict adherence to procedures and protocols. They also require secured systems that are protected against hackers and other threats. CMMS systems allow for managers to maintain strict security protocols while meeting mandatory inspections and procedures timelines.

Hotel and Hospitality Maintenance:

Hotels gain some of the most benefits from installing a CMMS program. They can schedule recurring maintenance, place work orders for faulty equipment, and manage their assets to ease annual budgeting. HVAC, plumbing, and ventilation are systems that require constant upkeep to keep guest happy; CMMS simplifies these functions.

School Maintenance:

With hundreds of students and faculty moving through the halls of schools having a maintenance plan is critical. In fact, the Department of Education has issued guidelines for maintaining school properties. Using a CMMS allows maintenance managers the ability to adhere to strict policies. Plus, because safety and avoiding maintenance emergencies is so critical to schools, having preventative maintenance software is practically a requirement.



HOW TO USE A CMMS

CMMS are amongst the best tools for facility and maintenance managers when it comes to getting work done, maintaining the buildings, and planning for future needs. The most significant benefit of maintenance software is the flexibility it provides regardless of your industry. A CMMS can be used for any business from educational, to healthcare, property management, seniors housing, golf courses, and even small businesses. The key is to figure out what your maintenance needs are and then to create a plan to address those needs.

Tools a CMMS Offers

While every CMMS company may offer different tools for its users, for the most part, there are five features that you can find in almost any CMMS software, these are work orders, asset tracking, preventative maintenance, reporting, and a mobile app. Maintenance Care also offers document storage in our Space Center, vendor store, and sensors. These features allow maintenance managers to stay on top of all of the facilities needs and plan for future budgets.

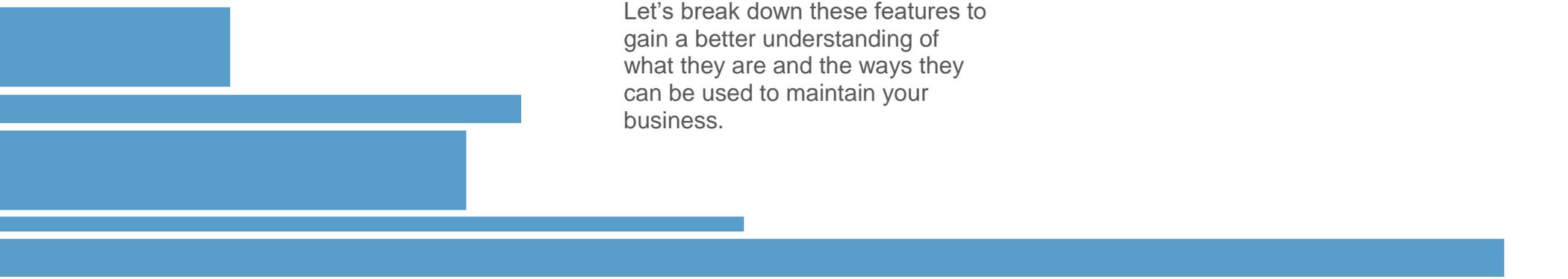
Features of a Maintenance Management Software

Let's break down these features to gain a better understanding of what they are and the ways they can be used to maintain your business.

Work Order System:

Work order software is one of the greatest technologies ever created for maintenance crews. In the past work orders were distributed in carbon copied paper form that could be easily lost or accidentally destroyed (or maintenance team members were simply stopped in the halls and verbally told about the request). Thankfully, those days are long gone.

Now work orders can be placed digitally making tracking and assigning efficient and straightforward. Managers can review and assign tasks from any location and know what their team is working on, which frees them to focus on other important tasks.



Tools a CMMS Offers

Asset Tracking Software:

Asset management is a powerful tool for your maintenance team. Using an asset tracking system your team can track everything from what equipment was purchased from what provider. You can record make, model, serial numbers, and more. This information will be crucial when it comes time to create an annual budget.

Asset tracking can also record repairs and even life expectancy. Wouldn't it be nice to know that your boiler is about to exceed the life expectancy in five years allowing you to budget the money you need to potentially replace it? All of these details are used to help your capital planning. Using a CMMS to track your assets simplifies your job and gives you the data you need to prove your budget request are necessary to maintain your facility.

Preventative Maintenance Software:

You've heard the saying "an ounce of prevention is worth a pound of cure," well, a CMMS is the best way to ensure you're doing all of the prevention you need. A preventative maintenance strategy is crucial in avoiding maintenance emergencies and keeping productivity levels high.

It's very common for weekly or monthly maintenance to be completed to make sure equipment you are using is operating at peak performance and to maintain longevity. A preventative maintenance feature allows you to schedule those routine updates. It allows you to remain compliant to regulations you may be held accountable for. Some preventative maintenance software even allows you to attach important documents like MSDS and training instructions to the task.

Staying on top of your equipment means you can keep it running longer. Plus, having preventative maintenance software means you'll be spending less on repairs, and therefore, maximizing your maintenance ROI.

Reporting Tools:

Having the software and tools you need to make the process of managing your team and facilities easier is just one of the advantages of a user-friendly CMMS. One of the best values is in the reporting functionality because of what it means for your team's productivity.

Using CMMS Across Industries

Being able to report to your supervisors the work your team has completed, export databases, and create detailed lists simplifies your job. You no longer have to bounce between excel sheets, calendars, and stacks of paper to get the answers you need about your maintenance efforts. That's what we call the definition of efficient.

Mobile App:

It is rare that a facility manager is going to be spending their day at a desk. More likely they will be bouncing from meetings to visiting teams working on projects. Working in a transient position like this requires a tool that can meet your active position.

Using a CMMS with a mobile app is the best way for you to be aware of your team's tasks and what awaits them as they complete projects. Being mobile as a facility manager is part of the job, and you can be more efficient at it with a CMMS program that offers a mobile app.

Using CMMS Across Industries

CMMS is not restricted to any one industry. In fact, as you probably read earlier, there are many different industries that can benefit from having maintenance software. With the various tools and features available, different industries will appreciate different aspects of their CMMS.

Here are just some of the specific ways some industries are able to use CMMS tools to fit their unique needs:

Healthcare Facility Management:

Hospitals will be able to capitalize on all of the functionality of a CMMS. In particular, preventative maintenance and work order software will be very useful to healthcare facilities. The work order tools will allow the maintenance team to stay on top of repairs and preventative maintenance software will make sure that generators, emergency systems, and HVAC equipment is not only working efficiently but is also meeting compliance regulations.



Using a CMMS Across Industries

Property Management:

For property managers, the ability to manage maintenance at multiple properties is a huge benefit of using CMMS. The asset-tracking will aid in capital planning, making it easier to plan and budget for repairs and replacements when they're actually needed. The knowledge about what replacement equipment each property needs and when will allow for buying things like fire detectors in bulk to save money.

Manufacturing Plant Maintenance:

Manufacturing businesses have a strong need for the work order management tools of a CMMS. Instead of having manager's email inboxes overflowing with maintenance requests that need to be assigned, the work order software will streamline the process of assigning and completing tasks. The preventative maintenance tool ensures that routine maintenance tasks are completed when they should be so a maintenance issue won't stop the plant from running properly.

Hotel and Hospitality Maintenance:

In an industry where keeping guests happy is the most important thing, unplanned repairs or broken equipment can cause serious problems. That's why having a CMMS with preventative maintenance tools is crucial for the hospitality industry. Plus, keeping guests happy by maintaining the cleanliness and functionality of rooms is easy with the work order software.

Small Business:

Small businesses are one industry that doesn't use CMMS nearly as much as they should. For some, it may be that they are unaware of how useful it is, or they think it isn't necessary. But, being able to schedule routine upkeep and task it to your team will simplify your day-to-day activities. Knowing your equipment and assets may be due for replacement allows you to create an action plan that won't break your bank.



MAINTENANCE MANAGEMENT SOFTWARE TIPS AND TRICKS

Now that you know all about what a CMMS is, where and how it can be used, and what the available tools are, it's time to learn best practices for using it. Below you'll find some of our best tips and tricks for using work order software and for asset tracking.

This section will be most useful for people who already use one out CMMS versions because it includes some technical tips on how to use to features. If your facility doesn't have a CMMS yet, make sure to save this EBook for future reference when you do get one.

Work Order Tips and Tricks

- Give everyone you can within your facility access to submitting a work order. The more eyes on the look-out in your facility to find potential problems the faster you will know about it.
- Make it easily accessible, preferably with no logging in required. The faster your team can get into the maintenance software, the better.
- Avoid too many fields or items in a selection list. Typically, have 10 options in a dropdown at the most making it simple for a person to submit a work order.
- Create automated workflows and notifications when a work order is created
- Have the request for plumbing issues go to your plumbing expert while electrical issues can go to a different person on your team
- Get a mobile device and manage your task list using the app. You'll find it much easier than having to remember every task you need to enter when you're away from your desk.
- Plan your workload by building area so you do less walking back and forth throughout the day
- Aim for a 65% Planned or Scheduled maintenance task list versus reactive daily work orders for optimum productivity
- Update your tasks right away so you can get the most accurate timelines of completion
- Record detailed notes so that you can search by key word in the future if the problem occurs again
- Utilize the Task Class feature to identify which tasks are related to Life Safety
- Schedule reports on a weekly basis that allow you to look at your task list from a bird's-eye-view, so you can determine if you are effectively managing your days.

MAINTENANCE MANAGEMENT SOFTWARE TIPS AND TRICKS

Asset Tips and Tricks:

- Utilize our Excel Asset Template to initially upload all your assets into the database
- Code your Assets with the same format consistently using 3 characters that describe the asset and 3 numbers to identify how many you have (i.e. Fridge = FRG-001)
- Create no more than 10 to 15 Asset Classifications to group your assets together
- Enter the Life and Value expectancy right away to get you started in building value for the information that is going to be captured
- If you don't have a lot of time, start with your major equipment; only assets over \$10,000, for example.
- Designate a person that will link assets to tasks to create transactions so that you can capture all costs and frequency of repairs.
- If using an outside vendor to fix an asset, have the vendor use the task number as reference or PO number on the invoice. When the invoice comes in from the vendor, quickly find the task using the task Number and update the cost of the transaction.
- Add your assets to Scheduled Tasks for automated transactions
- Print the built-in bar codes and stick them on to the asset for accurate tracking
- Schedule the Asset Forecasting Report twice per year; use it to help you determine which equipment will be in need of replacement as part of a bi-yearly inspection.
- Attach User Manuals to the Asset Profile for quick access.
- Attach How-To Videos that you find online to the Asset Profile
- Use the GL Code field as part of your yearly expense budget tracking to determine where you spend the most money and for what reason.



THE MAINTENANCE CARE CMMS

CMMS are amazing tools designs to make life easier for the user. The key is uncovering the best way to use it for your company. Choosing to use Maintenance Care for your CMMS needs means we will work with you to provide CMMS training for your team to make sure that everyone can be successful in using the software.

We understand that different facilities and different industries have different needs when it comes to a CMMS. That's why we've created three unique editions of our maintenance software; to ensure each one of our customers is getting the features and service they need.

Our three editions include a free CMMS software, a work-order only software, and fully comprehensive maintenance management software. It's up to you to choose the Free Edition, the Work Order Edition, or the Enterprise Edition, based on what your company needs. But, we're always here to help you decide what would work best if you need advice.

More About Our CMMS Editions

Here's a little more information about each of three CMMS editions. If you don't already have one, this can help you decide which one to get. If you already have the free CMMS software or the work-order one, have a look at what features you can get if you upgrade:

Free Edition

Our Free CMMS gives one user instant access to an online work order page, basic task list manager, and basic reporting for a single facility. You can activate the [Free Edition](#) right now!

Work Order Edition

You Get Everything included in the Free Edition plus: unlimited users, multi-facility availability, advanced work order features, task assignment, priority setting, document management, mobile app, reporting, and more. You can sign up for the [Work Order](#) CMMS today!

Enterprise Edition

You get everything included in the Work Order Edition plus: preventative maintenance scheduling and library, asset management, parts and inventory, cost tracking, capital planning, project management, and more. [Get a quote today](#) (it costs less than you think!)
