

GETTING STARTED WITH EZO CMMS

computerized maintenance management system

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WORK COMMAND CENTER – YOUR MAINTENANCE CONTROL PANEL

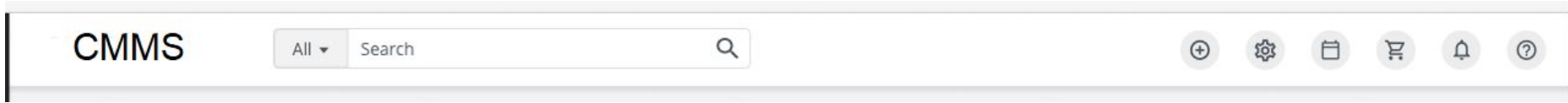
Here's what you're going to see as you log in. Work Command Center is a single view of your incoming, in-process, and outgoing work. A consolidated console to help you manage all the moving parts in maintenance:

- See all work requests coming in
- Track work orders, from start to finish
- Stay on top of escalations to plan, schedule and complete all work effectively

The screenshot displays the CMMS (Computerized Maintenance Management System) Work Command Center dashboard. The interface is organized into several key sections:

- Header:** Includes the CMMS logo, a search bar, and navigation icons for home, settings, calendar, shopping cart, notifications, and help.
- Dashboard:** Features a 'Last 7 Days' filter and a location selector, with an 'EDIT' button.
- Work Requests:** A grid of four cards showing: Active WR (18), Approvals Pending WR (18), Revision Pending (12), and Hi Priority (12).
- Work Queue:** A grid of four cards showing: Unassigned WO (23), Open WO (56), Open Preventive WO (0), and Assigned WO (18), with sub-categories for Hi Priority.
- Work in Process:** A grid of four cards showing: In Progress WO (09), WO in Review (18), WO Start Date due (18), and WO Overdue (18), with sub-categories for Hi Priority and Starting/Due Today.
- Work Orders:** A list of four '122, Brakes change' work orders, all in 'In Progress' status, created by Micheal, with a 'View' button for each.
- Weekly Planner:** A calendar view from Monday to Sunday. It shows tasks assigned to individuals: Evans Thomson (001 - Wall Pal...), Amy Walsh (001 - Wall Paint Required of the workshop), Jery Dane (001 - Wall Paint needed), and Daisy Moore (22 - Pump machinery repair, 15- Temperature sensors n..., Air Conditioners service re...).

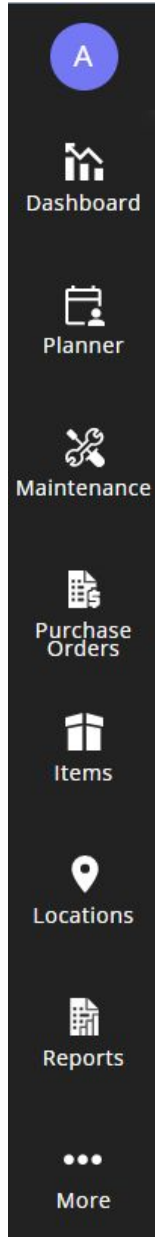
TOP NAVIGATION BAR



The Top Navigation Bar gives you access to quick action features to help you get started on your workflows right away. Here are the buttons from left to right:

1. **Company Name and Logo**
2. **Global Search:** Look for Items, Groups, Locations and more.
3. **Add new Items:** Create new Assets, Add Asset Stock and Inventory with a single click.
4. **Access settings:** Choose Company Settings and enable your preferred modules from Add Ons.
5. **Availability Calendar:** View the status of all Items at a single calendar
6. **Carts:** Take actions on a new Cart or view existing Carts from here.
7. **Notifications Bell:** View all of your pending notifications.
8. **Help:** Click here to view relevant help text for details about workflows.

SIDE NAVIGATION BAR



The Side Navigation Bar shows you key features of the maintenance management software. Starting from the top we have:

1. **User profile:** View and edit your profile settings from here. Read about feature updates and enhancements to stay in line with the latest developments on the app.
2. **Dashboard:** Get a snapshot of all critical maintenance KPIs right when you sign in. Set up customized dashboards for different roles for improved productivity.
3. **Planner:** Plan and schedule Work Order to improve collaboration between Work Supervisors and Technicians.
4. **Maintenance:** Start General and Maintenance Work Orders on your Assets. Set up Preventive Maintenance to keep equipment in excellent condition.
5. **Purchase Orders:** Generate new Purchase Orders and review pending requests for procurement.
6. **Items:** View, edit and take actions of Assets, Asset Stock and Inventory.
7. **Locations:** Keep track of all Locations and view associated Items all at one place.
8. **Reports:** Run insightful reports to display total costs, utilization and useful life of all assets.

THE DASHBOARD – QUICK VIEW, QUICK WORK

EZO CMMS' Dashboard is the industry-first, single pane maintenance-work management system. Click for an instant snapshot of any job, prioritize according to urgency and resolve issues, without ever leaving the Work Command Center screen. Speed through all open work in minutes, not hours. Learn more about the EZO CMMS Dashboard [here](#).

The dashboard is titled "Dashboard" and includes a filter for "Last 7 Days" and a "Location" dropdown. It features several key sections:

- Work Requests:** Active WR (18), Approvals Pending WR (18), Revision Pending (12), HI Priority (12).
- Work Queue:** Unassigned WO (23), Open WO (56), Open Preventive WO (0), Assigned WO (18), HI Priority (0), HI Priority (10).
- Work in Process:** In Progress WO (09), WO in Review (18), HI Priority (12), Review On Me (12), WO Start Date due (18), WO Overdue (18), Starting Today (12), Due Today (10).
- Work Orders:** List of "122, Brakes change" in progress, created by Micheal, with "VIEW" buttons.
- Weekly Planner:** Calendar view showing tasks like "001 - Wall Paint Required of the workshop" and "22- Pump machinery repair" assigned to individuals like Evans Thomson, Amy Walsh, Jerry Done, and Daisy Moore.
- Purchases:** List of Purchase Orders (PO # 122, PO Cost \$122, WO linked: #12344).
- Work Requests (Detailed):** List of "122, Brakes change" with "Repair" buttons and "Exp Start Date: 02/21/2022".
- Messages:** Notifications such as "Noor Khalid has acknowledged possession of 10 x 16 Grizzly Feeder Portable HYD 6" and "Zubair Staff has acknowledged possession of 14 Blade, Ripper, 183 hp".

Choose the time period and Location to display KPIs

Customize the Dashboard by adding or removing widgets

Get a snapshot of all the Work Orders in progress at the moment

View, edit and take actions on your Work Orders scheduled in a week or day

Stay on top of Purchase Orders and Work Requests coming in.

Catch up with the latest developments regarding Work Orders, Items and more.

PLANNER – ALL YOUR PLANNING NEEDS IN ONE VIEW

Manage assigned work orders for all your technicians in the Planner. Manage your unassigned work orders, side-by-side. Coordinate work in one place, so no task slips through the cracks. [Learn more](#)

The screenshot displays the 'Planner' interface. On the left is a vertical navigation menu with icons for Dashboard, Planner, Maintenance, Purchase Orders, Items, Locations, Reports, and More. The main area shows a Gantt-style view for '04 July 2022' with columns for 9 AM, 10 AM, 11 AM, 12 PM, 1 PM, 2 PM, and 3 PM. Technicians listed include Evans Thomson, Amy Walsh, Jery Dane, Daisy Moore, Ray John, and Sam Jackson. Work orders are represented by colored bars: green for '001 - Wall Paint Required of the workshop', yellow for '001 - Wall Paint needed', orange for '22- Pump machinery repair', '15- Temperature sensors not in order', and 'Air Conditioners service required', and red for '01- Refrigerator compressor out of order'. A callout bubble points to the top navigation area, stating: 'Choose to display weekly or daily view of Work Orders and filter them for different states.' Another callout bubble points to the main grid, stating: 'View a snapshot of all scheduled Work Orders and their associated details.' On the right, the 'Unplanned Work Orders' panel lists items like '112-Window Air Conditioner', '1223 - Engine Breakdown', and '1223 - Engine Breakdown' with details such as '34 - Fan Cooler', '882 - Honda Air Filter', and 'Honda Air Filter'. A third callout bubble points to this panel, stating: 'Assign and edit unplanned Work Orders that have not been scheduled or assigned yet. Complete Work Orders directly from here.'

WORK ORDERS – TRACK, ASSIGN AND REVIEW WORK

Stay on top of maintenance activities by tracking all your Work Orders at one place. Create Work Requests, review and resubmit Work Orders for uninterrupted workflows. Record associated service costs, link inventory and purchase orders to Work Orders for efficient management. [Learn more](#)

Switch between tabs to view Work Orders in different states and set up preventive maintenance.

Add a Work Request to expedite maintenance.

Create Work Orders for General and Maintenance categories and choose from different work types.

Work Orders

+ ADD WORK REQUEST

+ ADD WORK ORDER

CREATE PREVENTIVE TEMPLATE

ALL REQUESTS MY WORK ORDERS OPEN IN PROGRESS REVIEW PENDING COMPLETED PREVENTIVE MAINTENANCE CHECKLISTS SERVICES

ACTIONS ▾

Filters ▾

EXPORT TO CSV

<input type="checkbox"/>	ID	TITLE	ASSIGNED TO	CREATED BY	DUE DATE	STATE	WORK TYPE	⋮
<input type="checkbox"/>	3	Change Engine Oil	John Alex (Member)	Henry Brook	11/05/2022 00:00	In Progress	Preventive	
<input type="checkbox"/>	2	Improved Paint on St...	Mark Taylor (Member)	Harry Wilson	11/05/2022 00:00	Open	Upgrade	
<input type="checkbox"/>	1	Repair Truck Headlig...	--	--	--	Request Pending	Repair	

Displaying all 3 work orders

View a snapshot of all existing Work Orders and their associated details.



PREVENTIVE MAINTENANCE – SCHEDULE RECURRING MAINTENANCE

Schedule preventive maintenance for Items to prevent untimely breakdowns.

Work Orders

WORK REQUEST

+ ADD WORK ORDER

CREATE PREVENTIVE TEMPLATE

ALL REQUESTS MY WORK ORDERS OPEN IN PROGRESS REVIEW PENDING COMPLETED **PREVENTIVE MAINTENANCE** CHECKLISTS SERVICES

ACTIONS ▾

Filters ▾

EXPORT TO CSV

Set up a preventive maintenance template to add more than one Items or Groups at once.

<input type="checkbox"/>	TITLE	WORK TYPE	STARTED ON	END DATE	REPETITION INTERVAL	PRIMARY ASSIGNEE	
<input type="checkbox"/>	R Forklift Inspection	Preventive	--	--	1 month	Charli Dean (Member)	
<input type="checkbox"/>	S Conference Room E Re...	Repair	--	02/04/2023 00:00	--	Harry Wilson (Member)	
<input type="checkbox"/>	R Monthly Drill Inspec...	Inspection	--	--	1 month	Anna Thomas (Member)	

INTRODUCTION TO ITEMS

Identify what [type of items](#) you will track. There are three different types in EZO CMMS.

ITEMS TO KEEP

ASSETS



Items that are used over time and tracked individually, e.g. forklift trucks and cars.

Assets are used in production by different staff users and operators.

If you have 10 similar trucks, add them as 10 assets. Use the clone functionality to do things faster.

ASSET STOCK



Items that are used over time and are tracked in bulk rather than individually, e.g. tools, torque wrench, hammers.

Asset Stock quantities are checked out, reserved or moved across different locations for maintenance.

If you have 100 hammers, add an Asset Stock and add a stock of 100 to the record.

ITEMS TO CONSUME

INVENTORY



Perishable items that are consumed and permanently removed from stock count once utilized, e.g. gaskets, pipe fittings, gloves.

Inventory stock quantities are used in maintenance activities.

If you have 300 gloves, add an Inventory. Then add a stock of 300 to this inventory record.

Asset Stock and Inventory modules can be turned off from the Add Ons if you don't need them.

ADD ITEMS

Let's go ahead and create an Asset. Click on the quick add button from the top navigation bar or go to *Items* → *Asset* from the side navigation bar. You'll see the 'Add Asset' button in the top right corner:



Once you click on the button, you have to fill out each detail about the Asset yourself in the 'Create Asset' form. Let's look at some important fields for you to populate when adding the item details:


Field Name	Description
Group	You can categorize and organize items using groups. Choose a Group or Subgroup for the new Asset from the dropdown menu.
Identification Number	You can assign your own unique sequence numbers to identify items. It can also be printed and scanned as part of a barcode.
Vendor	You can list all your Vendors in EZO CMMS. Then when you're adding a new item, choose which Vendor you bought the item from.
Location	You can specify which Location the item is stored at.

Similarly, to create Asset Stock and Inventory, go to the respective pages under 'Items' from the side navigation bar and you will find the same options available.

ADD ITEMS VIA SCANNING

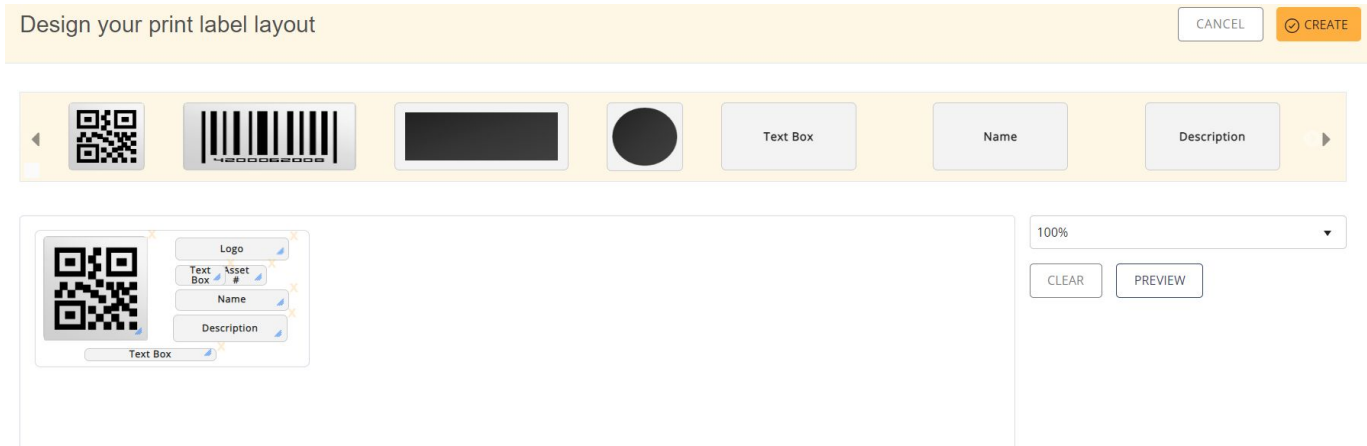
You can add assets by scanning as many asset labels as you want using a barcode scanner. First enable this feature from *Add Ons* → *Handheld Scanner Integration* → *Barcode Reader*.

Now go to *Items* → *Asset* and click on the 'Add Assets via Scanning' button in the top right corner.



+ ADD ASSETS VIA SCANNING

You can scan existing labels or [design and print new labels](#) of different sizes, styles and formats using the **label designer**. Go to *More* → *Print Out Templates* and click 'Add Print Label Template' to start. You can choose to create labels for Items, Bundles, Members, and Locations.



Design your print label layout

CANCEL CREATE

QR Code Barcode Solid Black Rectangle Solid Black Circle Text Box Name Description

Logo Text Box Asset Name Description Text Box

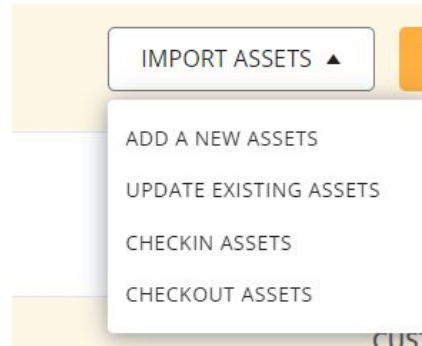
100% CLEAR PREVIEW

Note: When using Barcodes it is necessary to enter the 'Identification Number' or a Barcode number for your items.

Learn More: [More about Label Designing & Printing](#)

IMPORT ITEMS

You can upload all Assets and their details straight from an Excel file. Go to *Items* → *Asset* → *Import Assets dropdown* and select 'Add New Assets'.



When importing items, you need to map the columns to the appropriate fields available in EZO CMMS.

If you need to add new fields that are not available in the system, you can do so with the help of **Custom Fields**. Go to *More* → *Custom Fields* and click 'Add Custom Field'.

Apart from importing new assets or updating existing ones, you can also **mass check in or check out** assets by importing a spreadsheet listing all the assets you want to check in/check out.

Similarly, you can also import data to:

- Create Locations, Groups, Members or Vendors
- Assign Assets to Members
- Add stock to existing Asset Stock or Inventory

Learn More: [How to Import Items into EZO CMMS](#)

TAKE ACTIONS ON ITEMS

Take actions like check items in/out, reserve items, add to cart, send items into maintenance and place custody verification requests. Here's a comprehensive list of possible actions you can take on items:

ASSETS

- Add to Work Order
- Add to Purchase Order
- View Maintenance history
- Associate tools and parts
- Link to Projects
- Checkout/Check in
- Reserve
- Retire
- Print Labels
- Calculate depreciation

ASSET STOCK

- Add to Work Order
- Add to Purchase Order
- View consumption history
- View maintenance history
- Check-in,Checkout stock
- Reserve
- Retire Stock
- Add Stock
- Transfer Stock Location
- Print Labels

INVENTORY

- Remove stock quantity
- Add Stock
- Transfer Stock Location
- Request Stock
- Reserve
- Retire Stock
- Print Labels
- Link to Work Order
- Add to Purchase Order

ADD MEMBERS

[Members](#) are individuals who checkout Assets or Asset Stock items, or consume stock from Inventory. There are four types of default members in EZO CMMS:

1. **Admins:** who have full access and can add and update records. They can also take actions for Staff Users.
2. **Work Supervisor:** who can create, assign and review Work Orders.
3. **Technicians:** They can only take actions for Work Orders assigned to them.
4. **Staff Users:** Can be listed as equipment operators who can request Work.

<input type="checkbox"/>	NAME ^	EMAIL	ROLE	STATUS	SEND R
<input type="checkbox"/>	Anna Thomas	anisha.tanveer@7vals.com	Account Owner	Active	✉
<input type="checkbox"/>	Ben Harold	ben.arold@ezoffice.com	Administrator	Non Login	
<input type="checkbox"/>	Charli Dean	charli.dean@ezoffice.com	Staff User	Non Login	
<input type="checkbox"/>	Harry Wilson	harry.wilson@ezoffice.com	Staff User	Non Login	
<input type="checkbox"/>	Henry Brook	henry.brook@ezoffice.com	Staff User	Non Login	

ADD GROUPS

Groups

+ ADD GROUPEXPORT TO CSV

GROUP NAME ^	DESCRIPTION	ASSETS	AVAILABLE ASSETS	ASSET STOCK QUANTITY	INVENTORY QUANTITY	SUBGROUPS	CREATED ON
Default	default group	0	0	0	0	0	01/09/2023 02:58
Manufacturing Line	All items available at Warehou...	6	4	78	193	0	01/09/2023 02:59
Warehousing	All items installed at Manufac...	4	4	134	5106	0	01/09/2023 02:59

Displaying all 3 groups

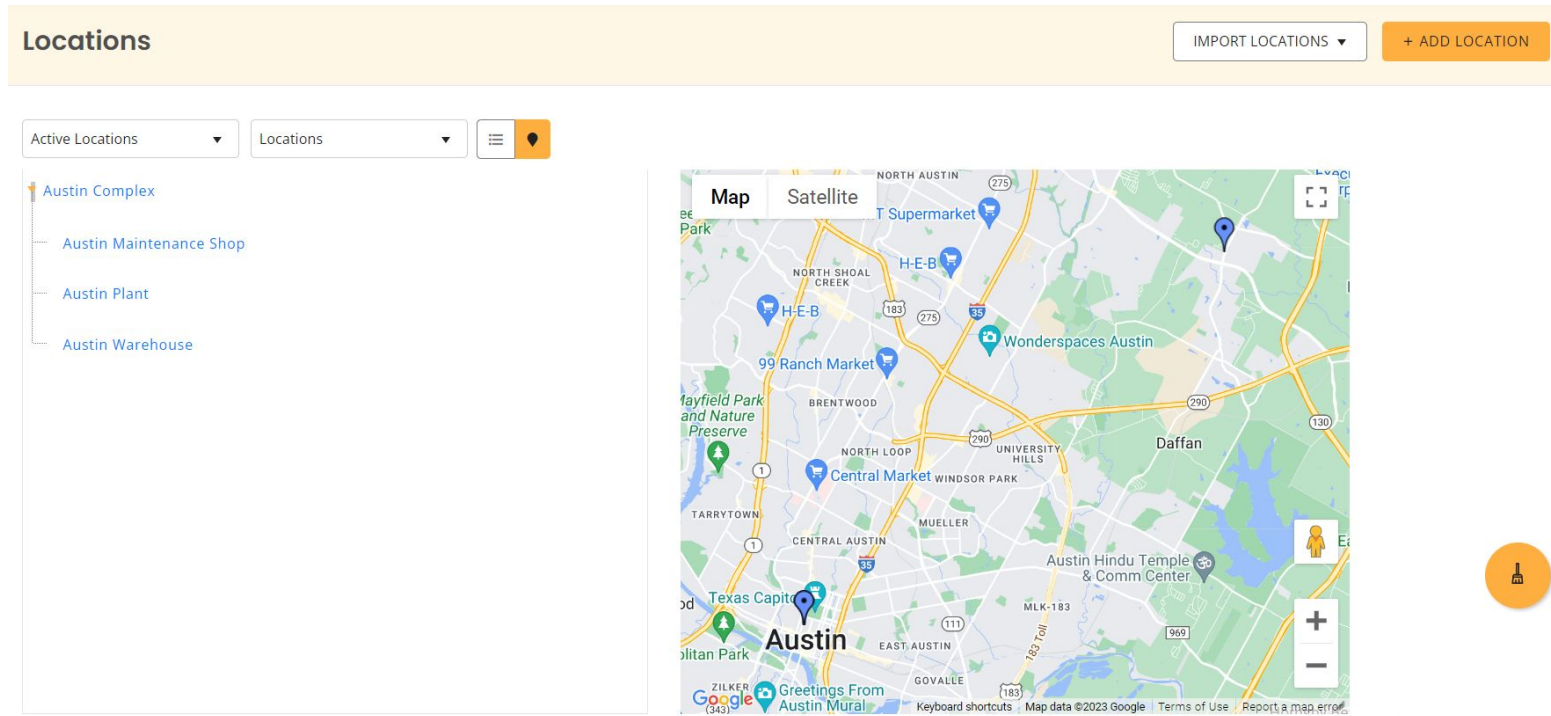
To add a new group, find the Groups icon on the side navigation bar. Use [Groups and Subgroups](#) to categorize your items. For example, all the camera lenses and tripods can go to the Electronics group.

ADD LOCATIONS

You can track Assets and stock quantities across different locations. Set up parent-child locations, and nest locations so you can track items from a country to a state, city, street, warehouse, all the way down to a single shelf.

To add a new location, find the Locations icon on the side navigation bar. Learn more about Locations [here](#).

All Stock Locations created can be seen on a map from the Locations tab.



SUBSCRIBE TO EMAIL ALERTS

To subscribe to and manage alerts, go to *More* → *Alerts*. You can select the actions you want to receive alerts for and also customize email templates better suited to your needs.

The screenshot shows the 'Alerts' management interface. It has a header with 'Alerts' and three tabs: 'MY ALERTS', 'STAFF ALERTS', and 'VENDOR ALERTS'. The main content is organized into three sections:

- Daily Digest:** Includes an 'ALERT TYPES' header and a 'Daily Digest Template' option.
- Confirmation Alerts:** Includes an 'ALERT TYPES' header and two options:
 - Send Confirmation Emails To New Non-Login Users ⓘ
 - Send Confirmation Emails To Login Users ⓘ
- Checkin / Checkout:** Includes an 'ALERT TYPES' header and two options:
 - Checkin
 - Checkin - Cart

All confirmed members receive emails based on their selected actions of interest, for example, work order created, requested, etc.

Staff members receive emails they've subscribed to only when they're involved in the action, while administrators receive emails for all actions across the company.

An important element to note here is the **Daily Digest**. You can either choose to receive emails for each event as it happens, meaning several alerts a day. Or you can opt for the 'Daily Digest of Alerts' which sends out a single email at day-end which includes all events from that day.

Learn More: [Types of Alerts in EZO CMMS](#) |

RUN REPORTS

You can access the Reports module from *More* → *Reports*. Gain valuable insights with reports on:

- Items
- Members
- Groups
- Work Orders
- Preventive Maintenance
- Purchase Orders linked to Work Orders
- Locations
- Vendors
- Inventory & Stock levels

The screenshot displays the 'Reports' module interface. On the left is a dark sidebar with navigation icons and labels: Planner, Maintenance, Purchase Orders, Items, Locations, Reports, and More. The 'Reports' section is expanded, showing a search bar and a list of report categories: Asset Graphs, Asset Reports, Member Reports, Group Reports, Location Reports, Vendor Reports, Work Orders Reports, and Inventory Reports. The main content area features a yellow header with 'RECENTLY PRINTED REPORTS' and 'CREATE CUSTOM REPORT' buttons. Below this, there are two main sections: 'Asset Graphs' and 'Asset Reports'. The 'Asset Graphs' section contains three report cards: 'Asset Growth' (Shows the change in total number of Assets over time), 'Total Asset Value' (Shows the change in total value of Assets over time), and 'Asset Checkout Frequency' (Shows the change in number of Asset checkouts over time). The 'Asset Reports' section contains three report cards: 'Available Assets' (Shows Assets available during a specified time period. Can be filtered by group, vendor, date of creation, and Asset location), 'Checked Out Assets' (Shows Assets checked out currently or in a specified time period. Can be filtered by location, custodian, group, subgroup, and vendor), and 'Check-in/out Events' (Shows all major Asset check-ins, checkouts and transfers over a specified time period. Can be filtered by action, location, group, subgroup). At the bottom of the main content area, there are three more report cards: 'Available Assets by Location', 'All Tools And Parts', and 'Overdue Assets'. A 'Support' button is located in the bottom right corner of the main content area.

To get more specific information catering to your use case, you can also create, save and [schedule Custom Reports](#).

Learn more about [Item Reports in EZO CMMS](#)

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FOR FURTHER ASSISTANCE:

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