ezo CMMS

Maintenance Management, Reimagined
Getting Started Guide – Mobile App

Work Dashboards | Planning & Assignments | Work Logging
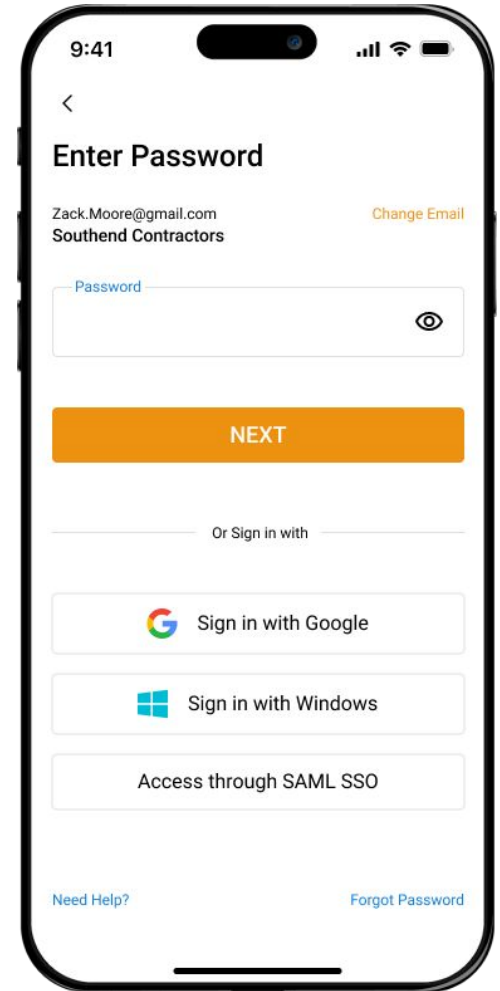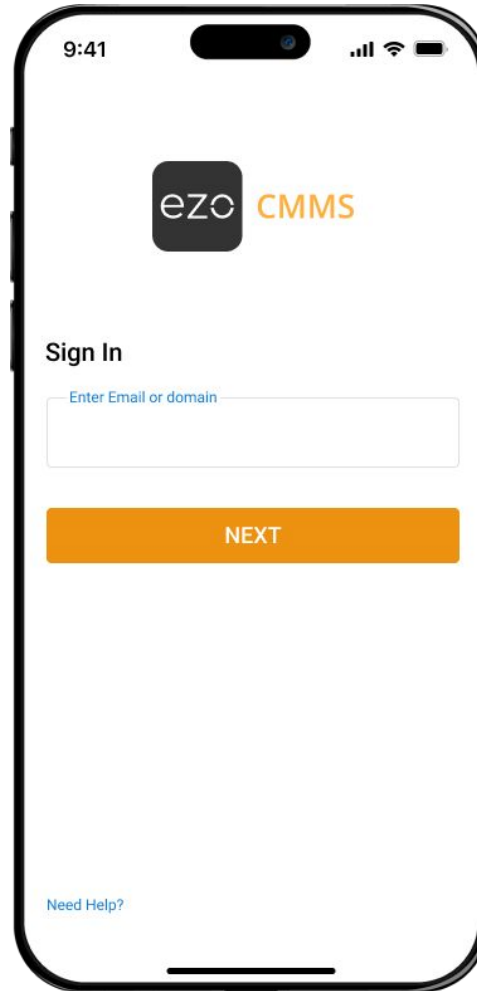
C O N T E N T S

1. Mobile App: Sign in

Get started by signing in to your EZO CMMS mobile app:

1. Enter your email or domain.

2. Next enter your password, or select from the sign in options to enable quick sign ins without entering all the details every time.

2. Centralized Work Management

The Dashboard provides a quick overview of all asset-related activities and instantly summarizes all Item events to get you started!

1. **Top Navigation:** Access important information from Global Search and View Carts.

2. **Quick Actions:** Easily find and start the most common actions such as 'Creating Work Request', 'Creating Work Order', and 'Manage Work Orders'.

3. **Instant Reviews**: Perform instant reviews for item requests as soon as you log in.

4. **Assignments**: Get a snapshot of all activities related to you.

5. **Bottom Navigation:** Switch between the Dashboard, Item Center, Scan Center, and More options.

    Note: Staff Users and Requesters can only view data for items that are assigned to them.
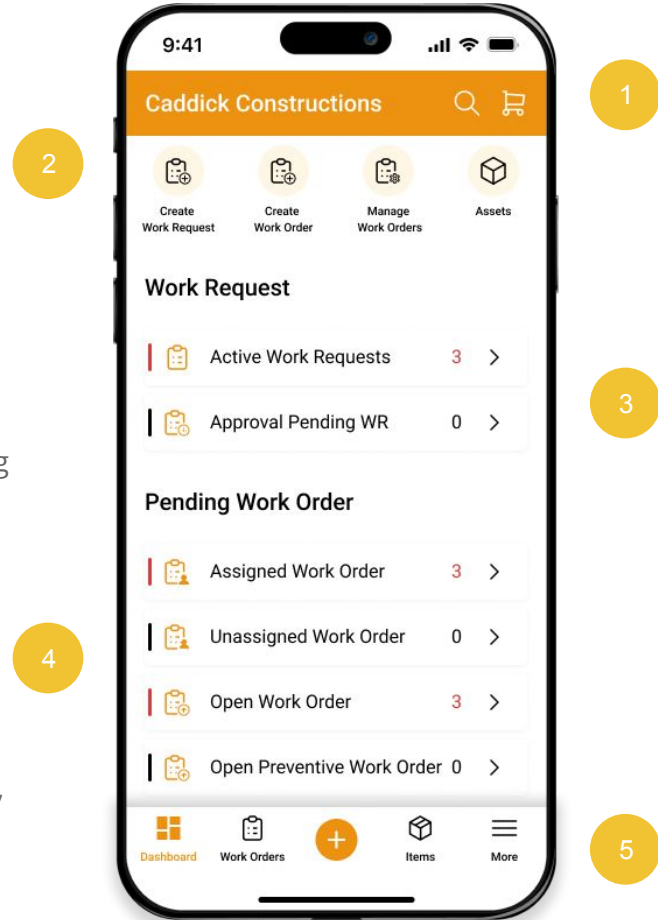
2.1. **Supervisor Dashboard**

Once a Work Request has been created, the Supervisor will be able to view it on their dashboard. On the Dashboard:

1. Tap on "Approval Pending WR" from the 'Work Request' widget.

2. The Supervisor will be redirected to the 'Work Request Listings' page.

3. Here the Supervisor can view review pending requests from all users.

4. Tap on the "Work Request" that needs to be approved/denied.
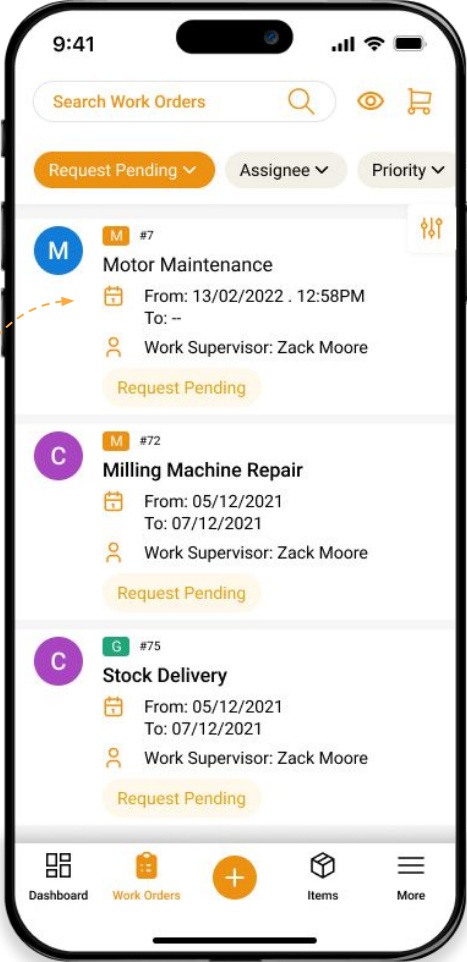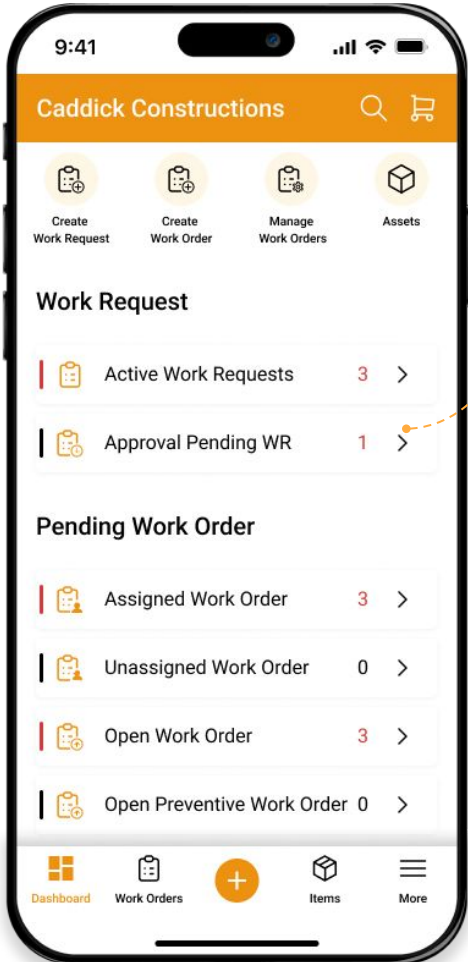
2.2. **Supervisor Workflow**

1. On the "Work Request" details page, the Supervisor will be able to either "Approve" or "Deny/Send" for Revision.

2. After a Work Request has been approved, it will be converted into a Work Order.

3. Tap on "Start Work Order", enter the assignees, start date and time. The Work Order will now be "In Progress".
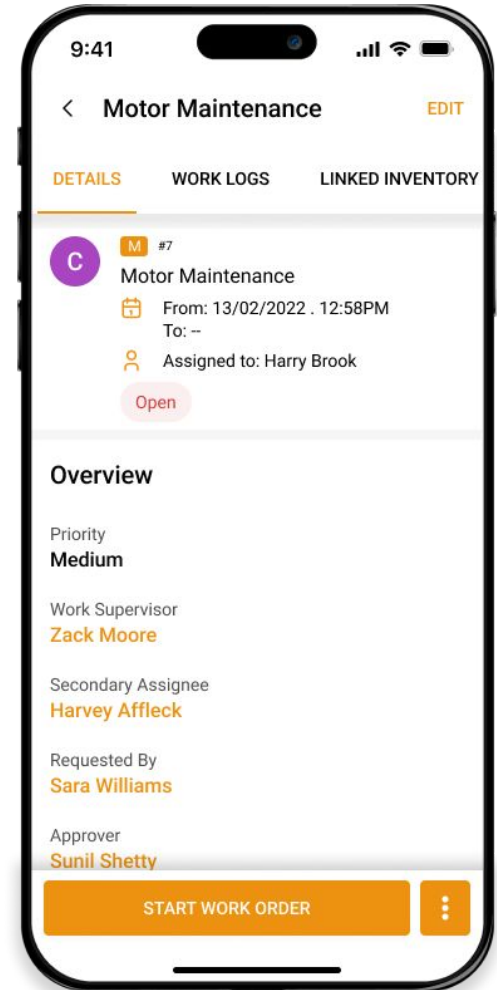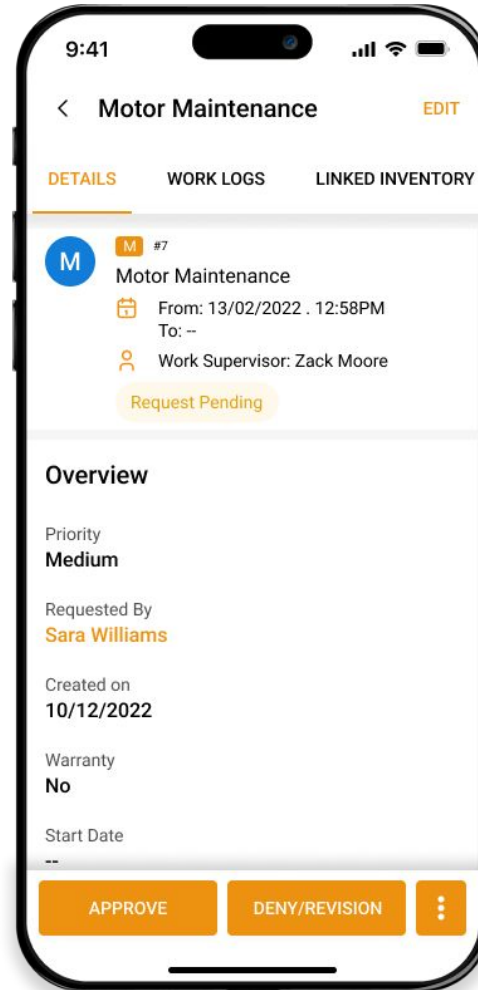
2.3. Technician Dashboard

Once the Work Order is started, the assigned technicians will be notified on their Dashboards:

1. Go to "Assigned Work Orders".

2. Here, the Technicians can view all the Work Orders assigned to them.

3. The Work Orders can be filtered by their state, priority, and the dates they were created.

4. Filter the Work Orders to select the ones that need immediate attention.
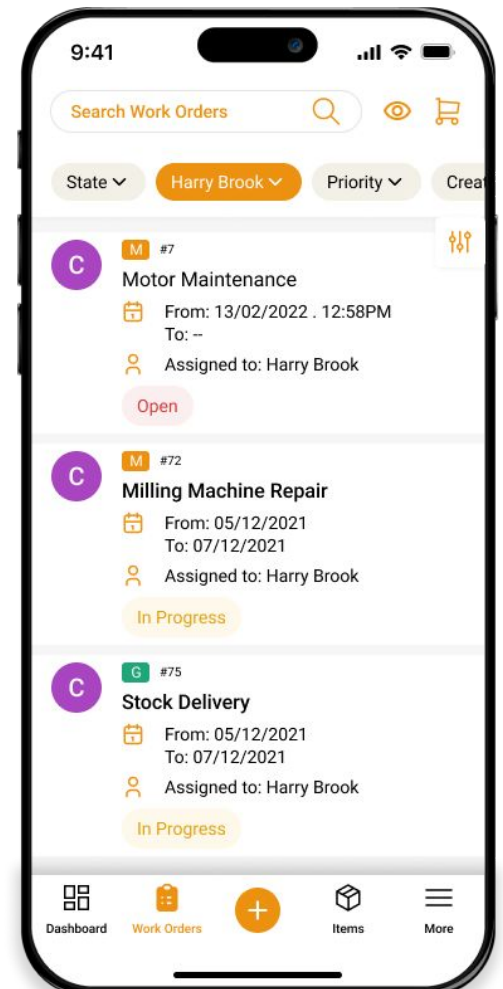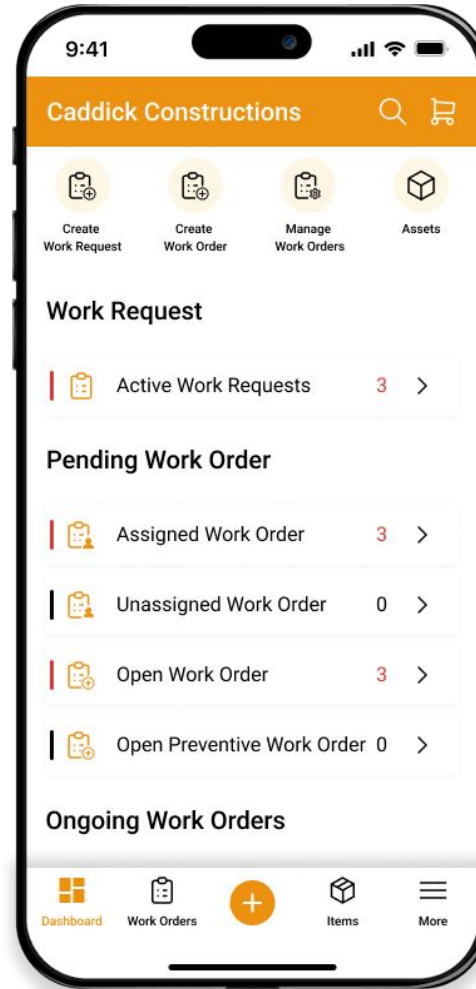
2.4. Technician Workflow

Tap on the selected Work Order to get started:

1.   On the Work Order details page, tap on "Start Work Order".

2.   Here, the Technicians can log their work progress, including updates, notes, and the time spent on each task.

3.   Also, link inventory with the Work Order to keep account of cost of items consumed.
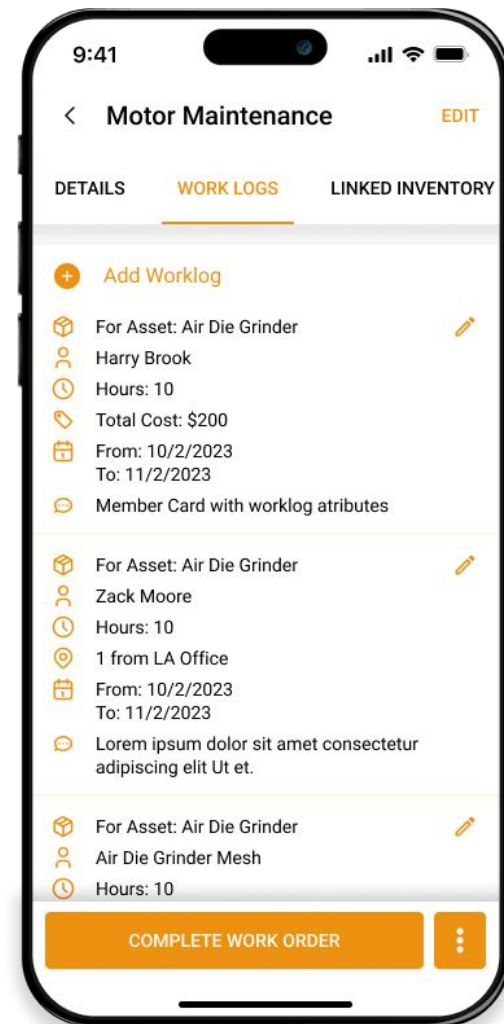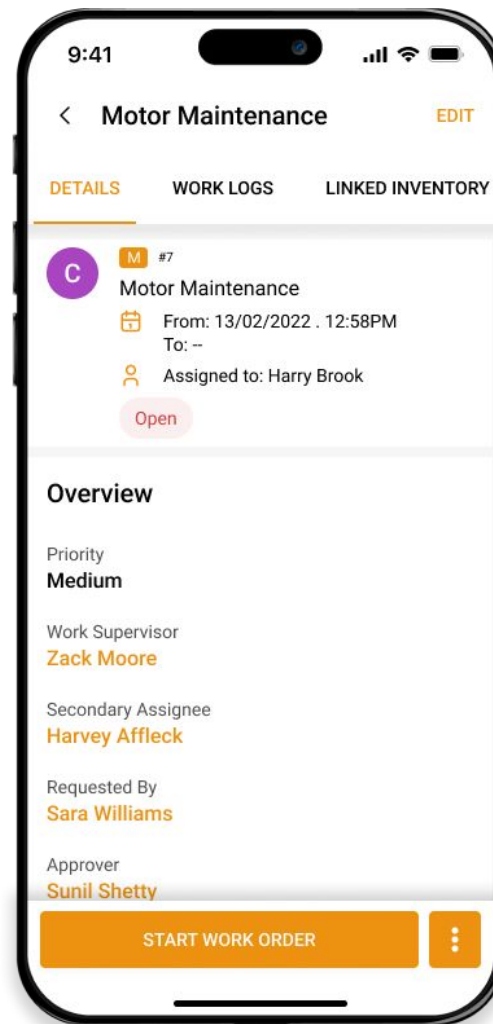
2.5. Technician Workflow

1. The Technician then proceeds to the "Checklists" tab to ensure all associated maintenance requirements are complete.

2. In case any unexpected roadblocks or approvals are needed, the Technician can add comments in the Work Order.

3. The next tab "Files" can be used to upload any documentation or images related to the Work Order.

4. After all the work has been completed, tap on "Complete Work Order".

5. The system will generate a completion timestamp and notify the Admin/Supervisor immediately.
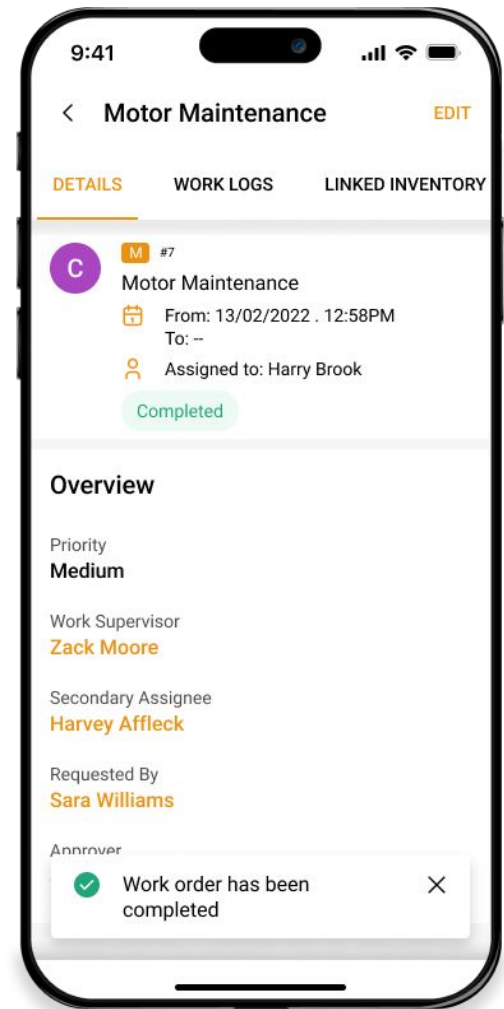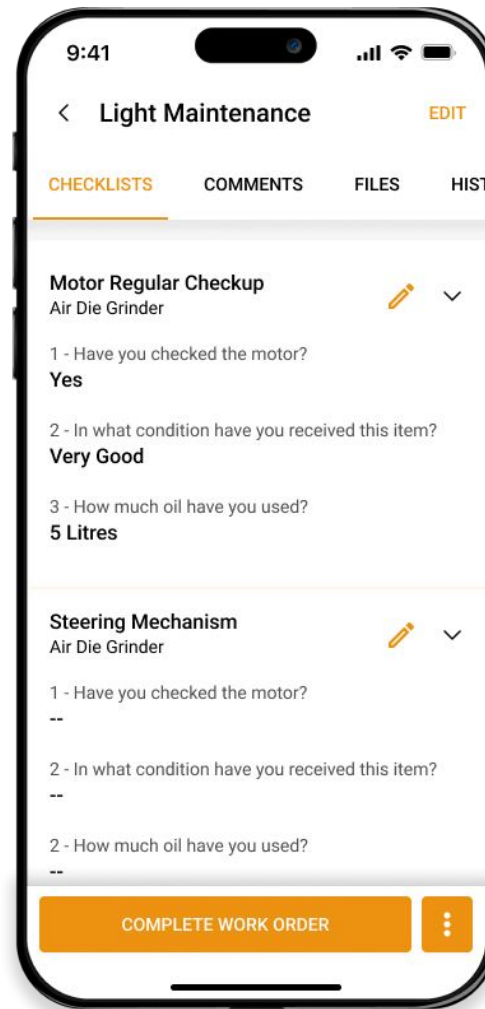
2.6. Requester Dashboard

A Requester can create a Work Request reporting a breakdown and submit it to a work supervisor for approval and review:

1. On the Dashboard, go to "Create Work Request"

2. Enter the "Title" and "Description" to explain what requires maintenance or repair.

3. Associate Items with the Work Request. You can either scan with a barcode scanner or use your camera.

4. After all the details have been entered, tap on "Create Work Request".

5. Once a Work Request has been submitted, it will be sent to the work supervisor for approval.
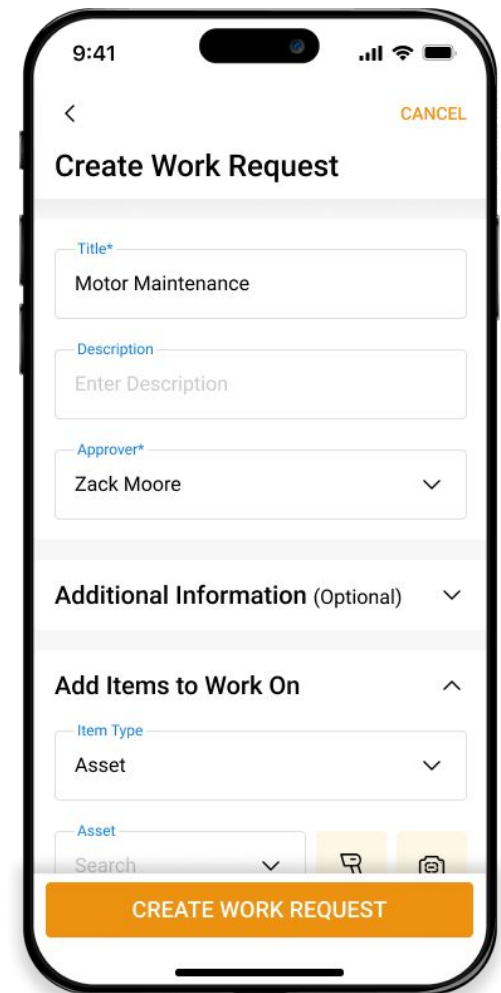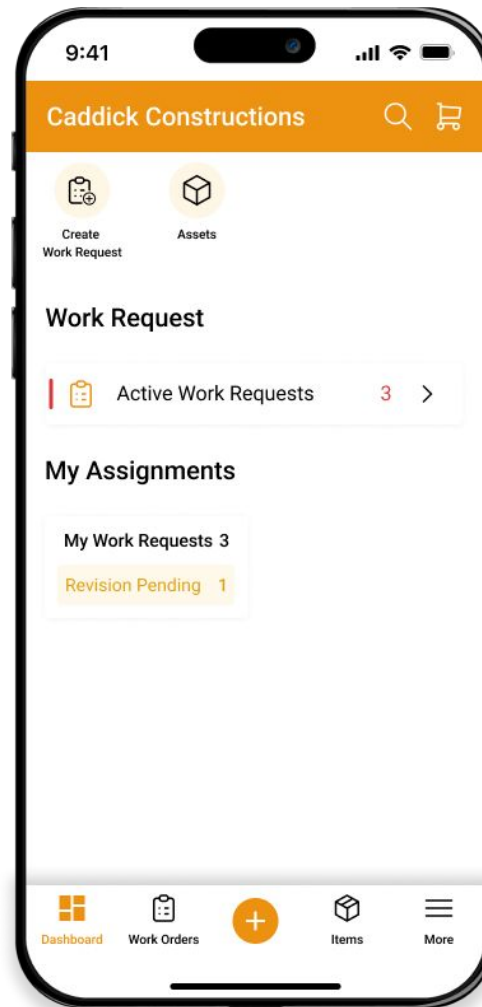
3. Navigation Menu

Enhanced menu and features: From the bottom navigation bar, tap on "More" to view Items, Bundles, Packages, Carts, Locations, and Work Orders.
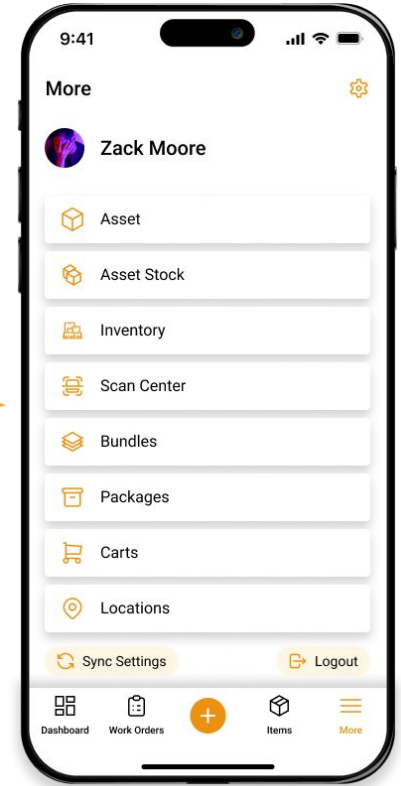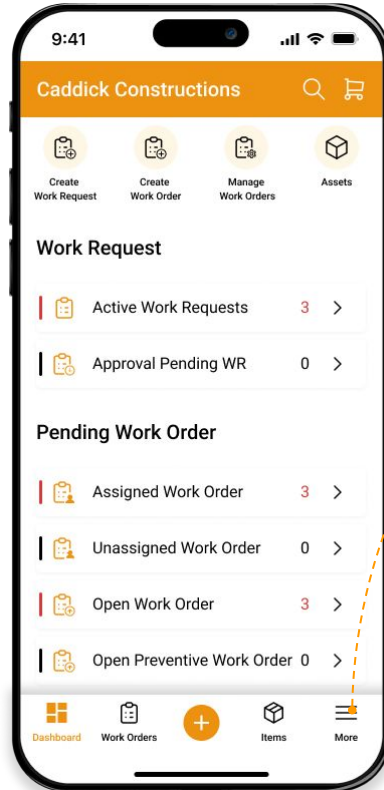
3. Navigation Menu

Quick Add: The "Add" button enables you to create a Work Order, Work Request, and other listings for various items with just one tap.
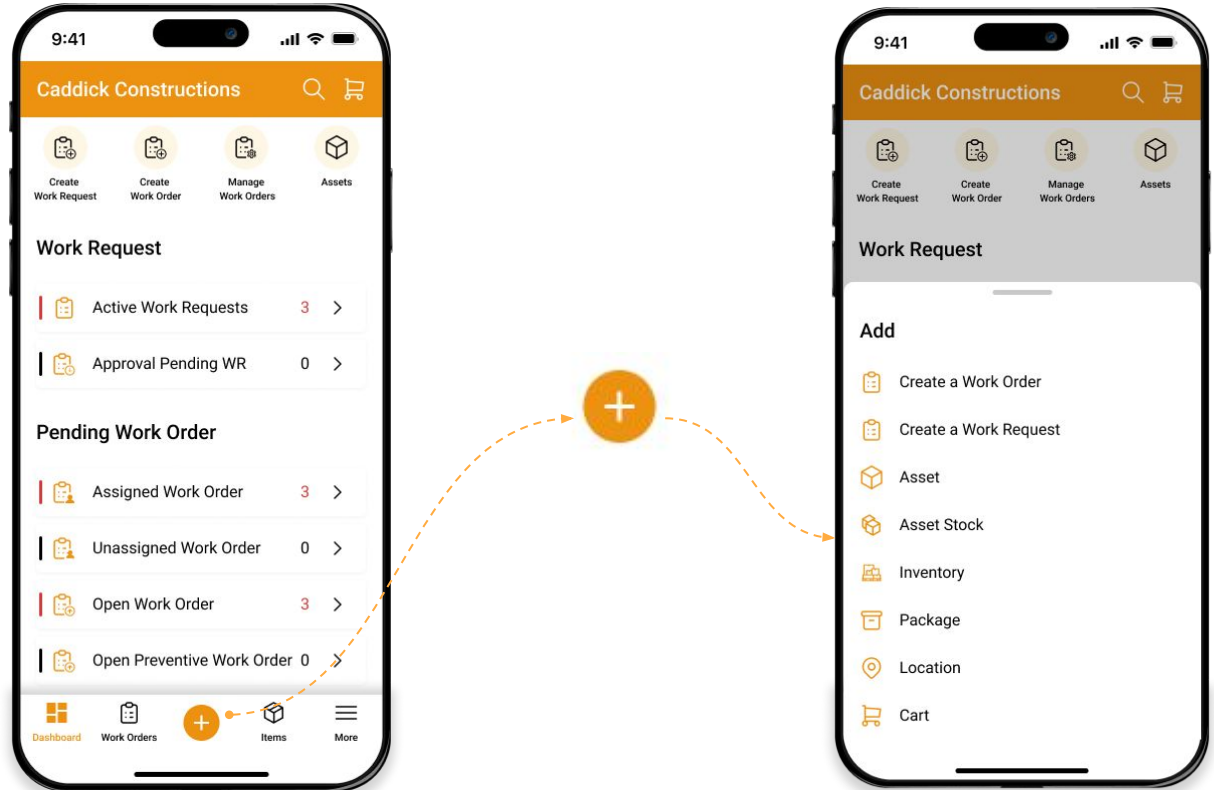
4. Global Search

Quickly find anything you need - anytime, anywhere
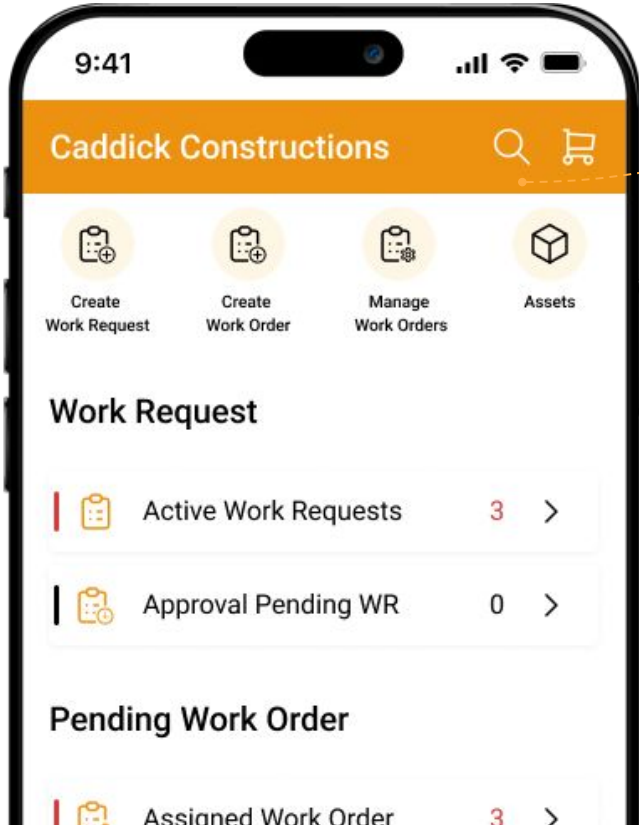
Use the Search Bar on the Dashboard to find anything across modules instantly.
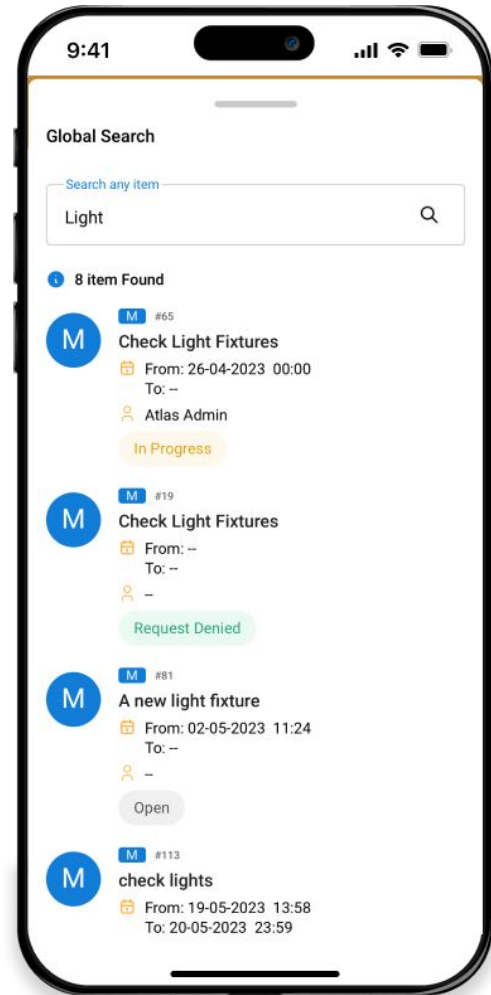
5. Item Center

Find and take actions across any item types

1. Use the Quick Search to find the required Items.
2. The search results will display Items across all modules: Assets, Asset Stock, and Inventory on the "Mix Listings" page.
3. Sort Items based on Name, Location, and Time to get a comprehensive view of workflows.

Click here to watch a quick video of the Item Center in our mobile app video.
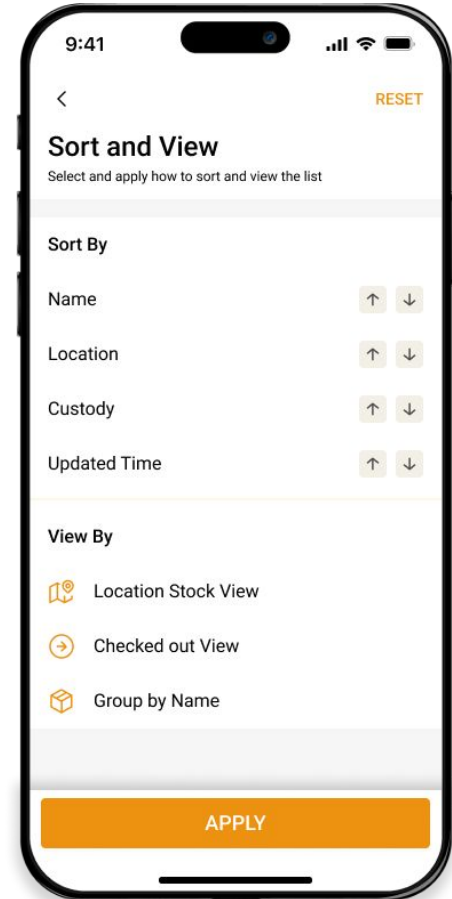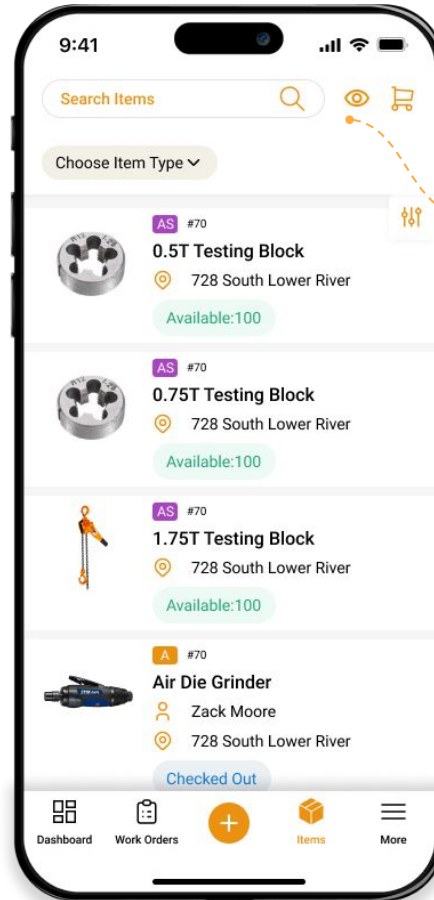
5.1. Item Center Mix Listing Page

On the Item Listing page, you can take the following actions:

1. **Filtering items:** Tap on the "Filter" button to apply Primary and Availability Filters to customize your view.

2. **Navigating to the Item Details Page:** To head to an Item Details Page, tap on the Item card.

3. **Actions on Mix Listing page:** Simply tap and hold the Item and then select the required action.
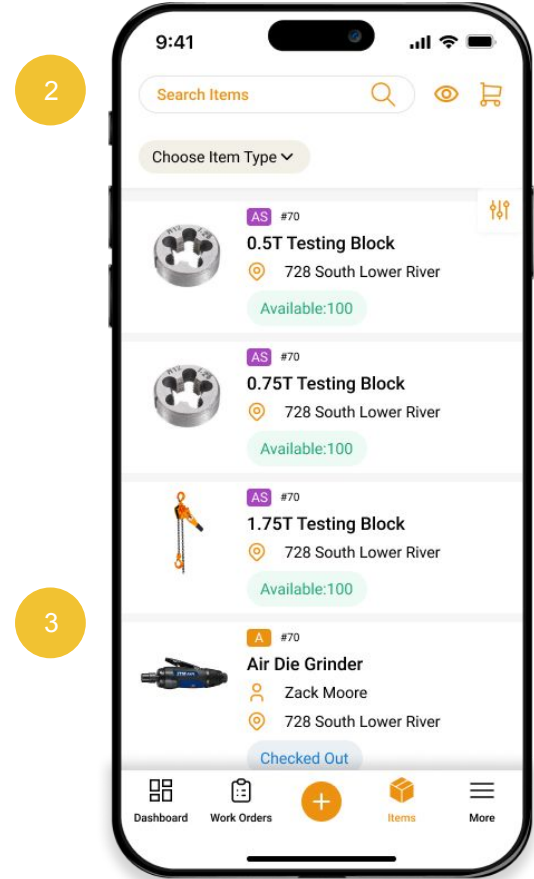
5.2. Asset Detail Page: Actions and Tabs

The Item Details Page serves as the source of all data available for an Item. Scroll down the page to see a host of different data points such as the item's Location, Group, and Custom Fields.

1. **Editing items:** Tap on the "Edit" button at the top-right to edit item details for the concerned item.

2. **Check out/in and Reserve:** Tap on the relevant button to log data regarding checkouts, reservations, purchase orders and more from anywhere.

3. **Tabs**: Access associated Carts, Work Orders, Reservations, Comments, and History directly from the details page.

4. **Navigating back to the listing**: Tap on the back arrow "<" to go back to the listing.
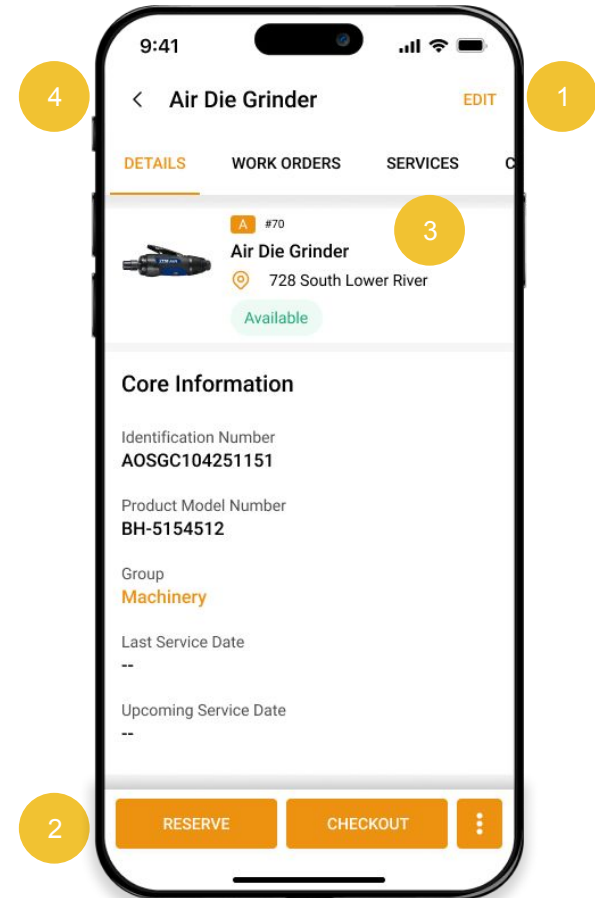
6. Scan Center

Scan items in quick succession with EZO CMMS's Scan Center to create a list or take various actions. Here's how you can do it:

1. Tap on the "Scan" button in the bottom panel on the Dashboard.

2. A pop up will appear asking you to select a suitable scanner.

3. Next, position the barcode or QR code within the designated area. Upon detection, the screen will display the Item #.

4. The scanned Items will be displayed in the "Items Tab".
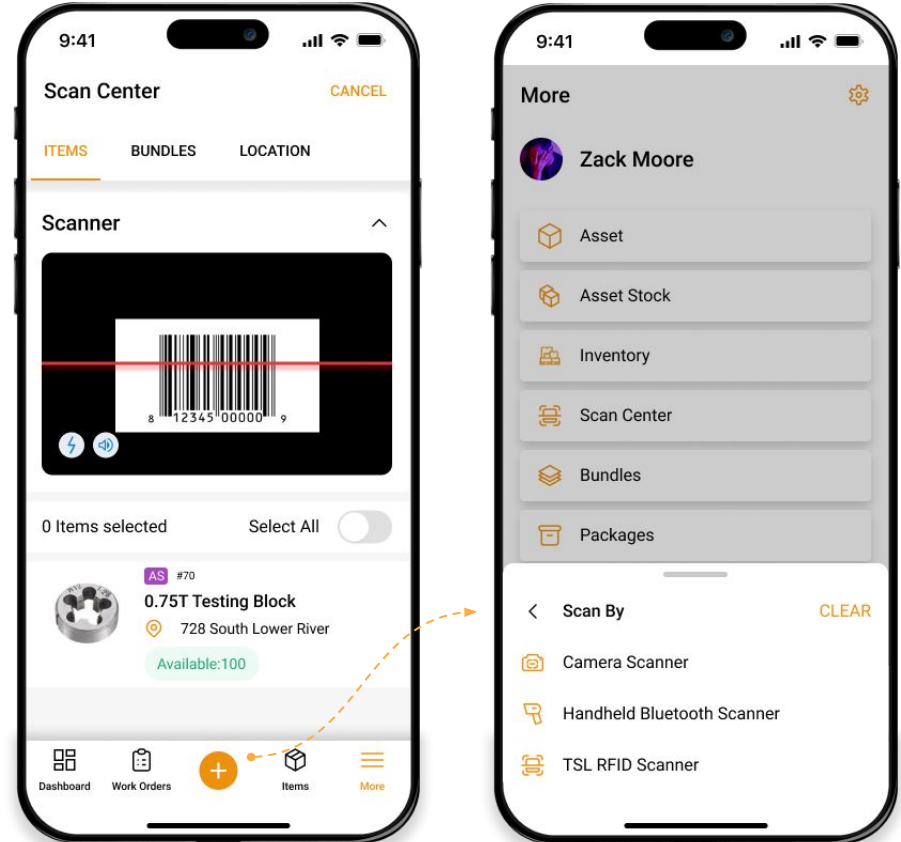
6.1. Actions on Scanned Items

Once scanned, you can take multiple actions on the Items:

1. From the top bar, select any action, such as "Check in", "Checkout", or "Reserve".

2. Fill in the details and complete the action to return to the scanned Items list.

3. Once you complete an action, the scanned Items list will be cleared.
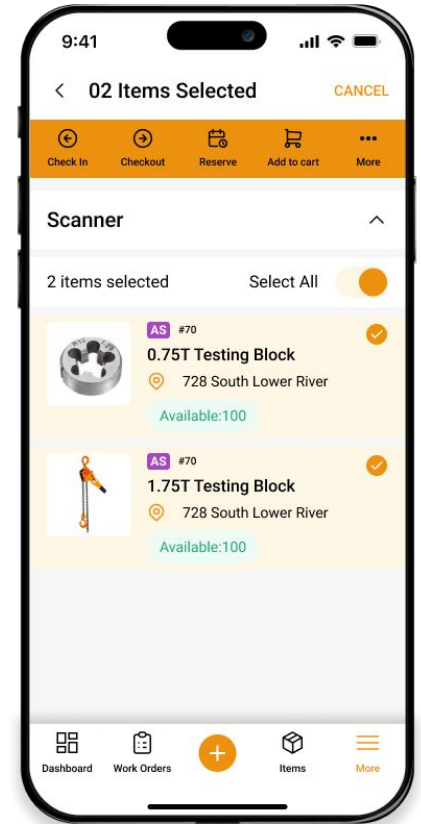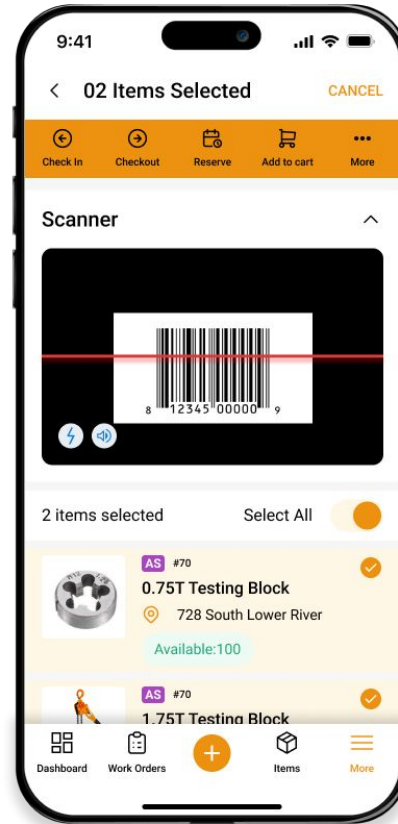
6.2. Adding New Items Via Scanning

1. Scan the barcode/QR code of the Item you want to add to your database.

2. Tap on the "Invalid Code" overlay. Here you will be able to see all the codes of the Items you have scanned.

3. Next, tap on "Create Item(s)" and select the Item Type you want to add.

4. Complete the action by hitting Continue.
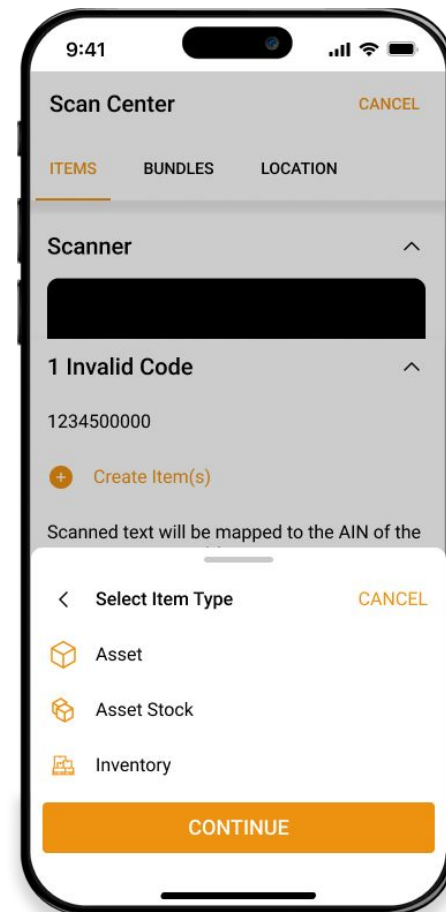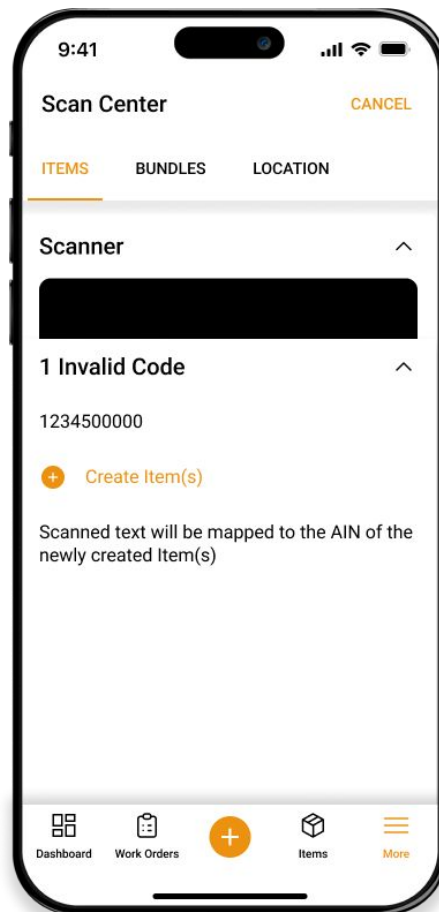
7. Carts

Carts enable you to check out or reserve multiple items together. The Carts "Add On" must be enabled from the desktop app in order to show up on the Mobile App. To do this, head to *Settings → Add Ons → Carts* from the desktop app and enable the Add On.

Once enabled, open the Carts tab from the Mobile App and toggle between Cart states for "Active", "Reserved", "Current", "Checked Out" and others.

1. Search through Carts and filter according to Cart Items and dates.
2. Tap in to view the Cart details. Everything is organized and categorized in tabs for further details.
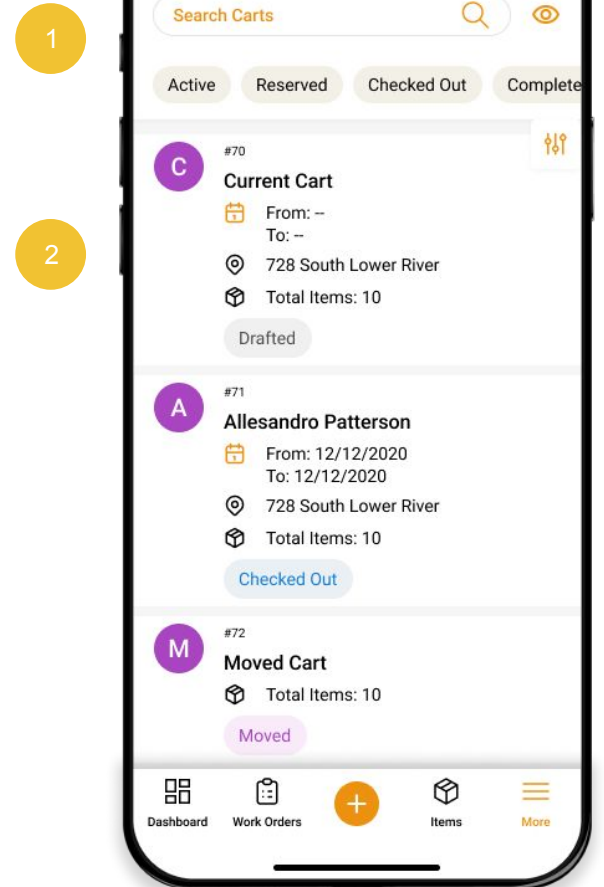
7.1. Adding a New Cart

1. To add a new Cart, tap on the "+" button in the bottom navigation bar and select "Carts" from the "Add" overlay.
2. Create a new Cart by adding Items through simple search or even scan them through scanner or your camera.
3. Next, Scan or search for a Location for your Cart.
4. Complete your Cart by hitting "Create".
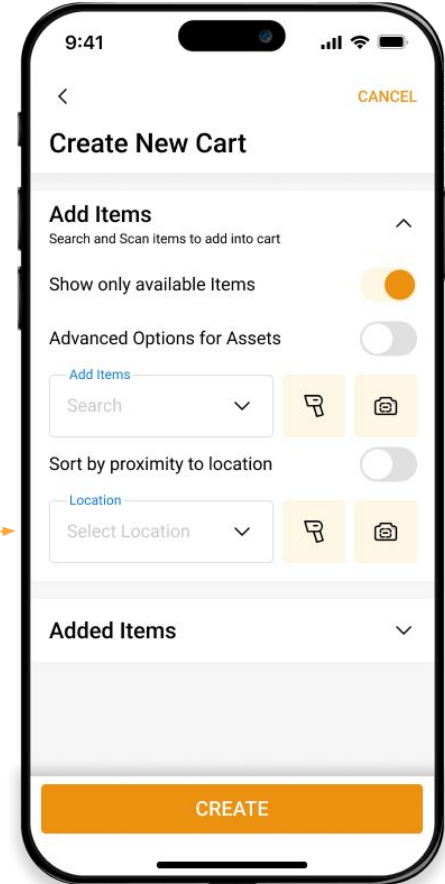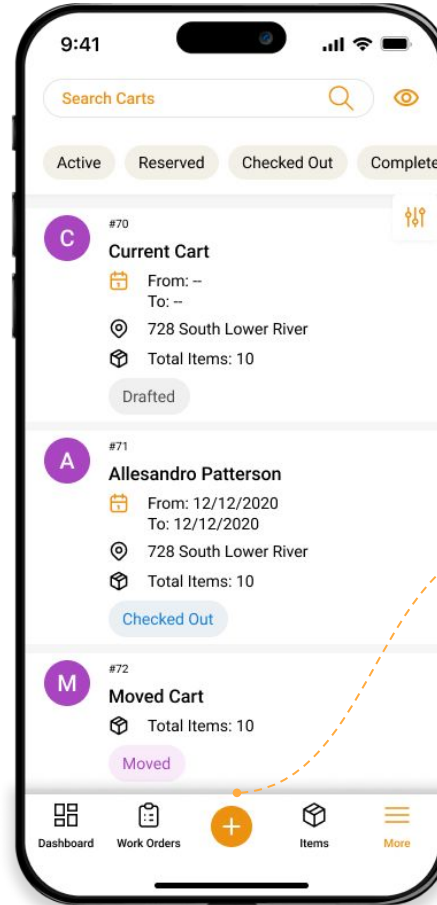
7.2. Cart Actions: Checkout

From the Carts listing page, tap on the Cart you want to take actions for. Top actions for Current Cart are "Reserve" and "Checkout". The rest can be viewed under More.

1. Easy forms with icons to help facilitate quick Checkouts.
2. Item review to verify all Cart Items and edit quantity to accommodate last minute changes before Checkout.
3. Enter any additional comments for users and complete the Checkout action.
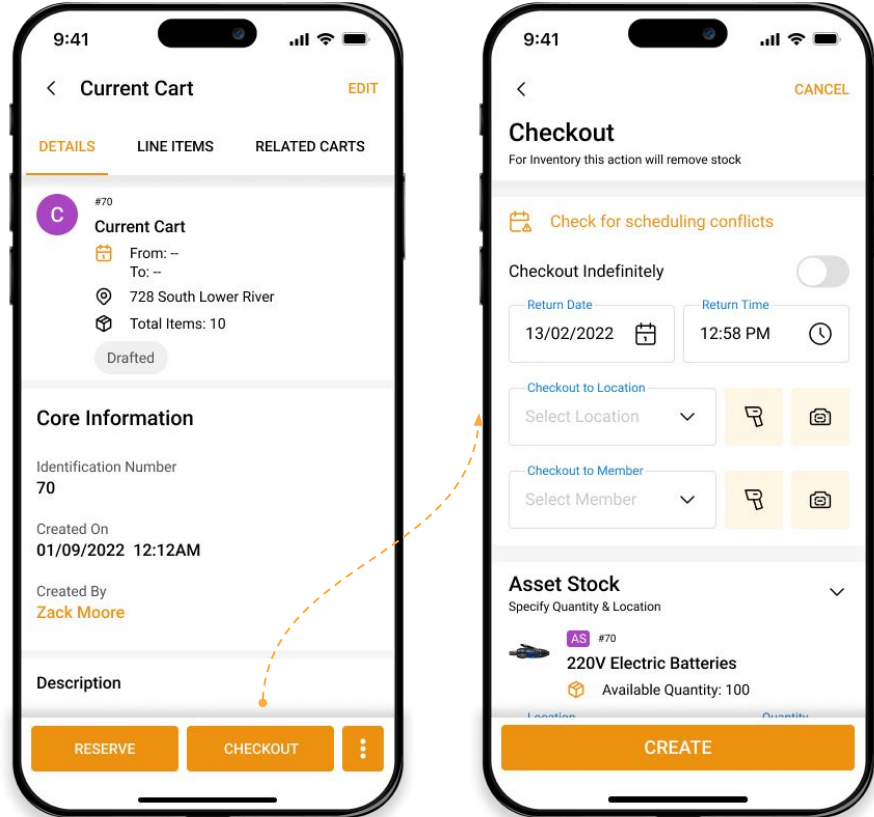
8. Bundles

Bundles in the EZO CMMS Mobile App enable companies to group items based on their own company workflows in order to speed up item processing and enhance productivity.

To use Bundles, you will first have to enable the "Add On" from the desktop app. The Bundles tab will not be visible in the mobile app if the "Add On" is disabled.

To enable Bundles, go to *Settings → Add Ons → Bundles* from the desktop app. Note that Bundles cannot be enabled if the Carts Module is disabled.

That's it! Now, access this tab from the mobile app by tapping on the 'More' button on the bottom navigation bar.
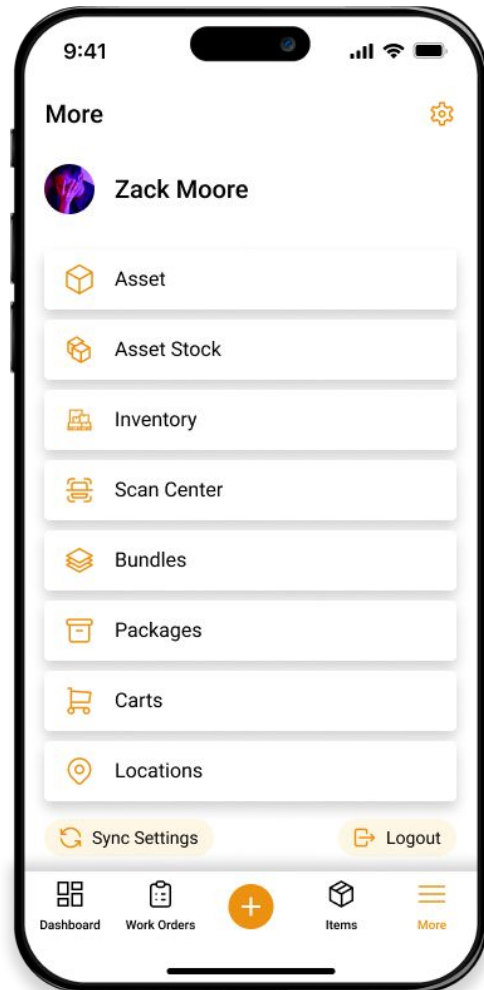
8.1. Bundles Listing

The Bundles Listing enables you to get a bird's eye view of all your Bundles so you can access them to take further actions.

1. Use the top navigation to filter Bundles by the following statuses:
    - Available
    - Location
    - Retired
    - Available During

2. Tap on a Bundle to go to its details page.

3. Hold and tap multiple Bundle images to select them for mass actions.
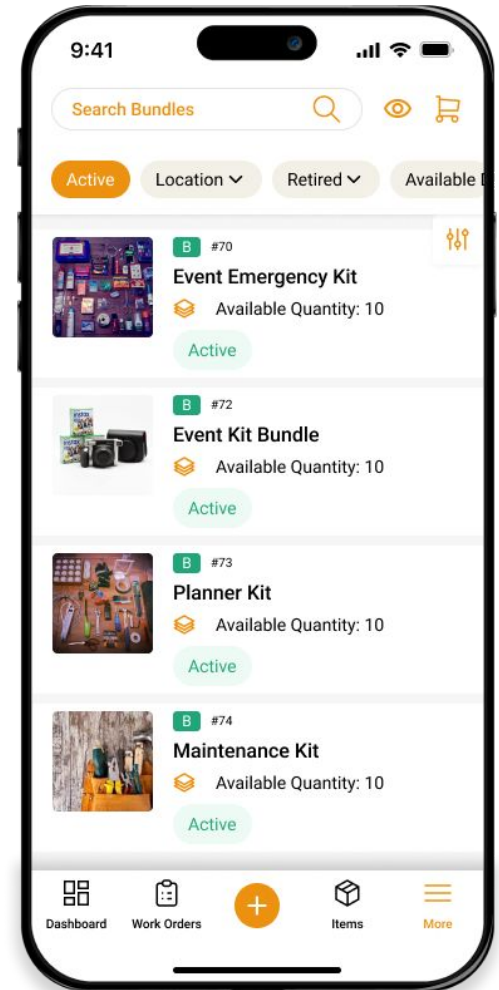
8.2. Taking Actions On Bundles

You can use the Bundles tab to add a Bundle to a Cart by going to its details page. This expedites the checkout process and enables users to find everything they need efficiently.
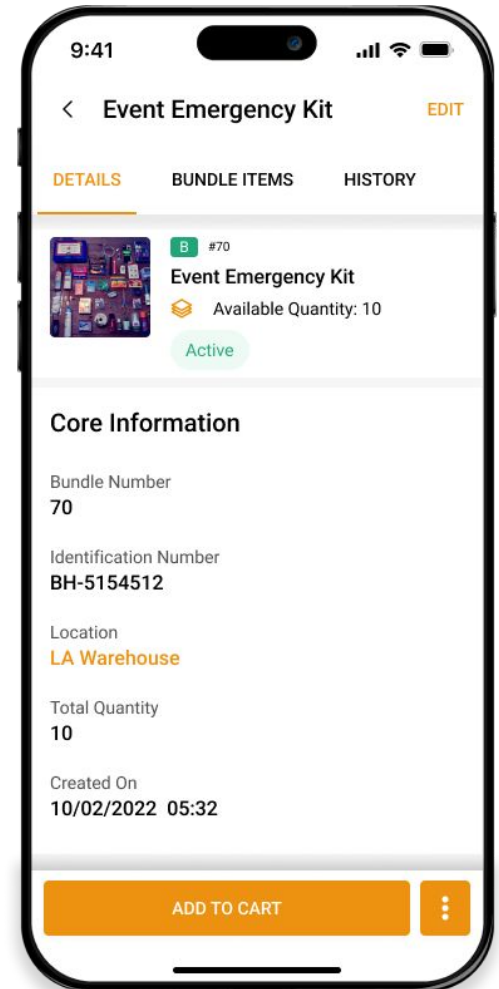
1. Tap on the "Add to Cart" button to add the Bundle to the Cart. You will be able to select or deselect Bundle Items before adding them to the Cart that you want to check out.

2. Edit the Bundle Items by adding or removing Items as required.

3. Tap on the three dots to "Clone" or "Retire" the Bundle.

9. Packages

In the EZO CMMS Mobile App, packages allow companies to group frequently used items together, streamlining workflows and boosting productivity.

To use Packages, you will first have to enable the "Add On" from the desktop app. The Packages Tab will not be visible in the mobile app if the "Add On" is disabled.

To enable Packages, go to *Settings → Add Ons → Packages* from the desktop app.

That's it! Now, access this tab from the mobile app by tapping on the 'More' button on the bottom navigation bar.
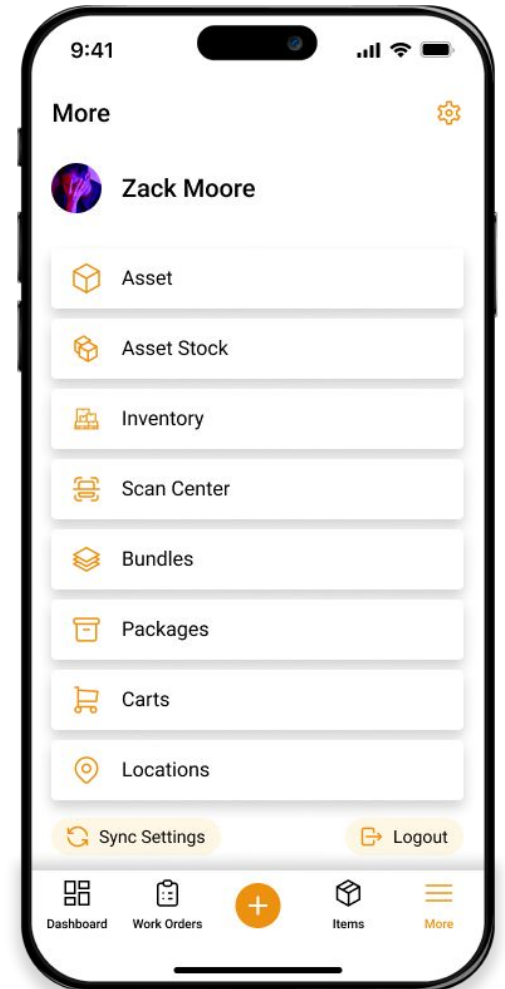
9.1. Packages Listing

The Packages Listing enables you to get a quick snapshot of all your Packages so you can access them to take further actions.

1. Use the top navigation to filter Packages by the following statuses:
   - Available
   - Checked Out
   - Packages in Custody

2. Tap and hold to select them for mass actions.

3. Tap on a Package to go to its details page.
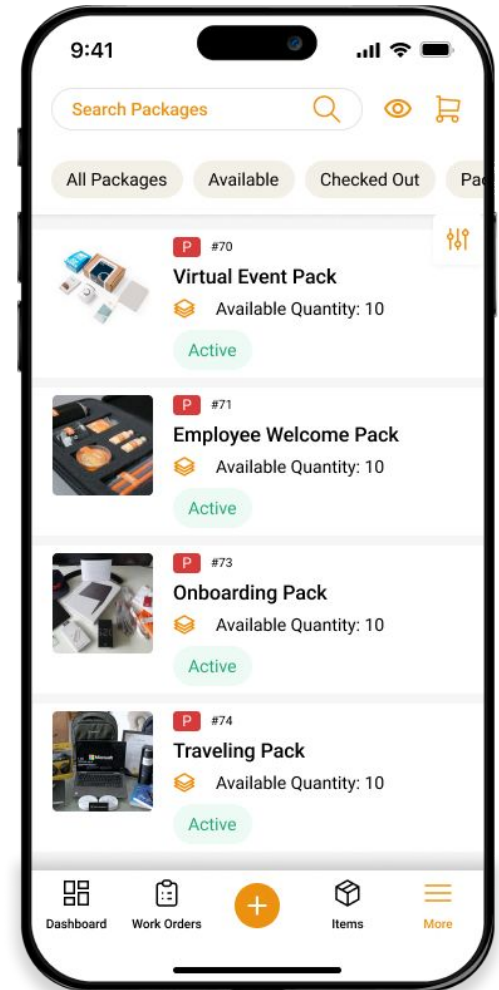
9.2. Taking Actions on Packages

You can use the Packages Tab to add a Package to Cart by going to its details page. This escalates the checkout process and enables users to find everything they need easily.

1. A Package can be checked out by adding it to a Cart. Reserve the Package for an upcoming project to save time and streamline workflows.

2. Edit the Package Items by adding or removing Items as required.

3. View Package history to check the record of all changes made to the package along with user details.
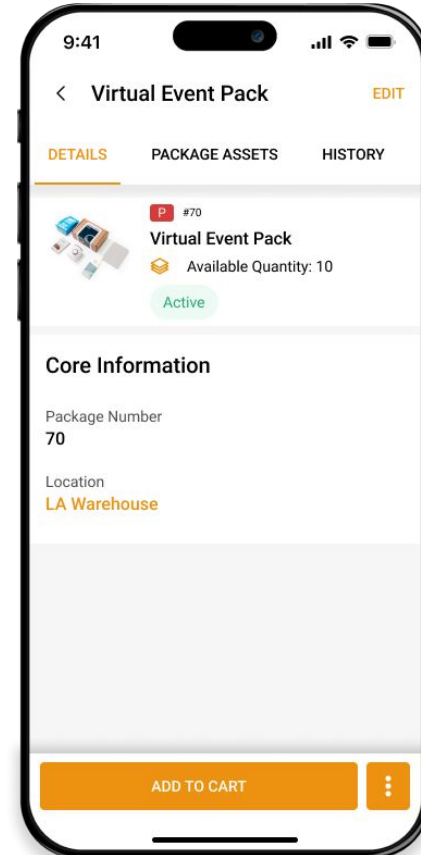
10. Locations

The EZO CMMS Mobile App enables users to track Locations on the go, making it easier to check in and check out Items from remote sites.

1. Use the search bar to look for various Locations.

2. Filter out Locations by Active and Inactive states.

3. View all Locations on the map for a global view of business operations.
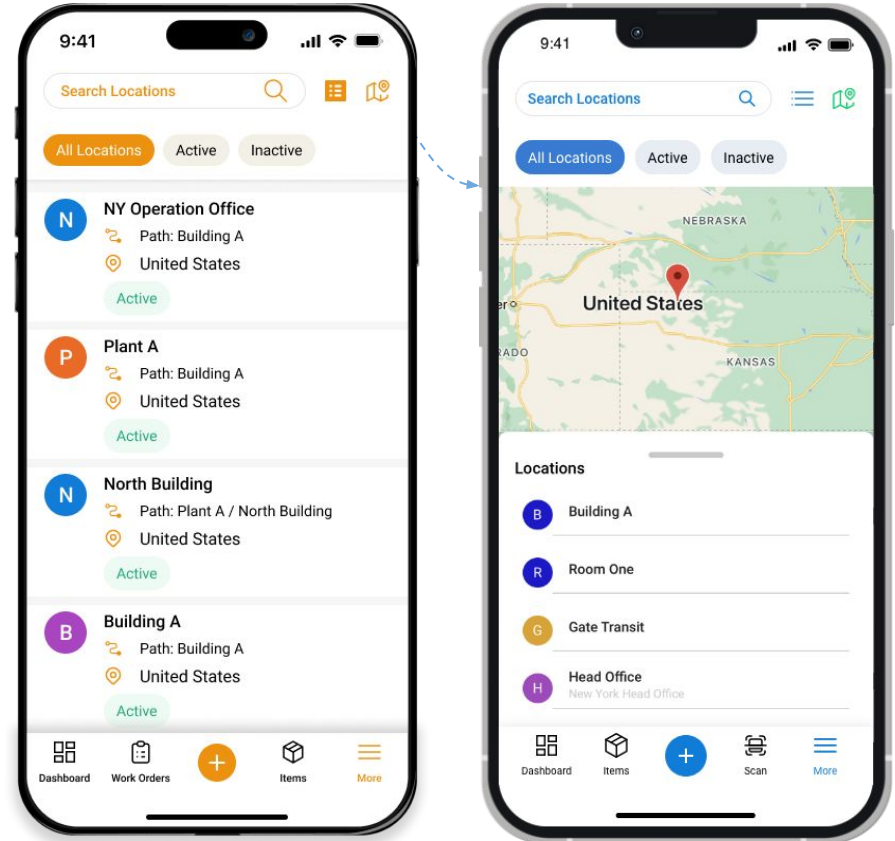
10.1.   Location Actions

Tracking Locations on the go enables users to provide instant real time updates. With Locations, users can:

1. View core information like linked Items, their quantities, and nested locations.

2. Add Work Orders and Items to a particular Location.

3. Upload related files for a particular project at a Location and add Comments to keep track of progress at all times.
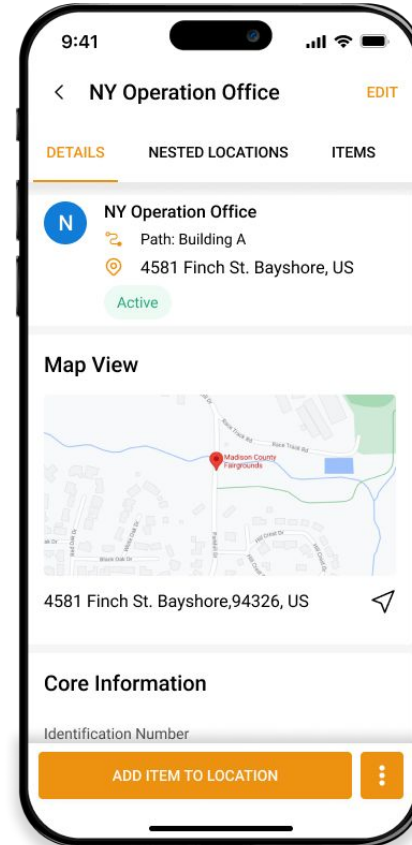
ABOUT EZO CMMS

EZO CMMS is robust maintenance management software that helps you manage assets, schedule maintenance, and track work orders – all in one place. Streamline operational workflows and enhance productivity using this computerized maintenance management software.

Sign up for a free 15-day trial today, no credit card required

https://ezo.io/ezo-cmms/sign_up/

FOR FURTHER ASSISTANCE:

🌐 https://ezo.io/ezo-cmms/blog/

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