

Some hints on setting up CWorks

Data Entry

The CWorks database consists of a number of linked tables. All of these tables have a Key field. The Key fields typically will be Work Order Number, Asset Number, Task Number, Part No, Failure Code Number, Location Number.

All of these fields have associated description fields, but it is the Key field that is used by the system to link tables together. In order to make the system as efficient as possible the following is recommended for all Key fields

1. Avoid spaces, avoid leading zeroes, use only alphanumeric characters and , do not use :/!\<>.,;"'@#^*(), some of these will stop the system working, it is OK to use _ and -
2. Try and keep the data in any key field the same number of characters. When you make a report columns have to be as wide as the longest Key field for that table.
3. If you are entering consecutive numbers, it is better to start with 100, 1000 or 10,000 rather than 1,2,3 etc. This will keep the Key field length consistent and make it easier to spot invalid numbers.
4. Unless you already have a familiar and logical numbering system, do not try and build a lot of logic into the number. The searches provided will normally allow you to find the number for any item.
5. Be consistent in the use of Capitals, leading caps and lower case. Recommend Caps in Key fields and Leading Caps in Descriptions. Long descriptions in lower case. If you are trying to sell to higher management, presentation is important
6. There is no restriction on what you put into description fields

Master Tables Set Up

7. Set up standards for most master tables:

- a) Failure Codes. These should be set up with a view to using them to extract the most useful data from the Work Order records
- b) Asset Categories. These should reflect such things as pumps, compressors, HVAC etc. it will then be possible to search records for typical repairs to ,say, pumps. It would also allow the use of unassigned Asset fields per Category.
- c) BOM List. This a free standing list of Spare Parts that can be associated with any selected Asset(s)
- d) Suppliers/Contractors, only the format needs to be common
- e) Location is a grouping(system) of several Assets, not always geographical. It will allow cost gathering and can also be used in the PM system for general inspections
- f) Assets. Normally belong to a Location. Assets can be set up hierarchically. Ensure there is logic and consistency in the Asset numbering system
- g) Employee/Requestor. Recommend a marked-up rate be applied so that labor costs will be available as time is entered
- h) Cost Center is only used on Purchase Orders. Worth considering using the department field for this as it is linked to every Asset and could be used to track costs/commitments per Account Code/Cost Center
- i) Job Plan can be used to describe a particular maintenance procedure and then called up on a Work Order.
- j) Safety Instruction, much as a Job Plan but related to lock-outs/vessel entry etc
- k) Misc. These should be under corporate control in terms of any changes or variations

Reporting Options

SQL Reporter. This can be used to establish particular reports per site. It is important to ensure that it is linked to the correct database.

KPI Excel Macro. This reads selected fields from the database by date range and then uses incorporated pivot tables to sort that data. This could become a standard monthly Excel report that is submitted by all sites.

WorkLog. Enables easy entry of data on existing WOs and creation and closing of Breakdown WOs