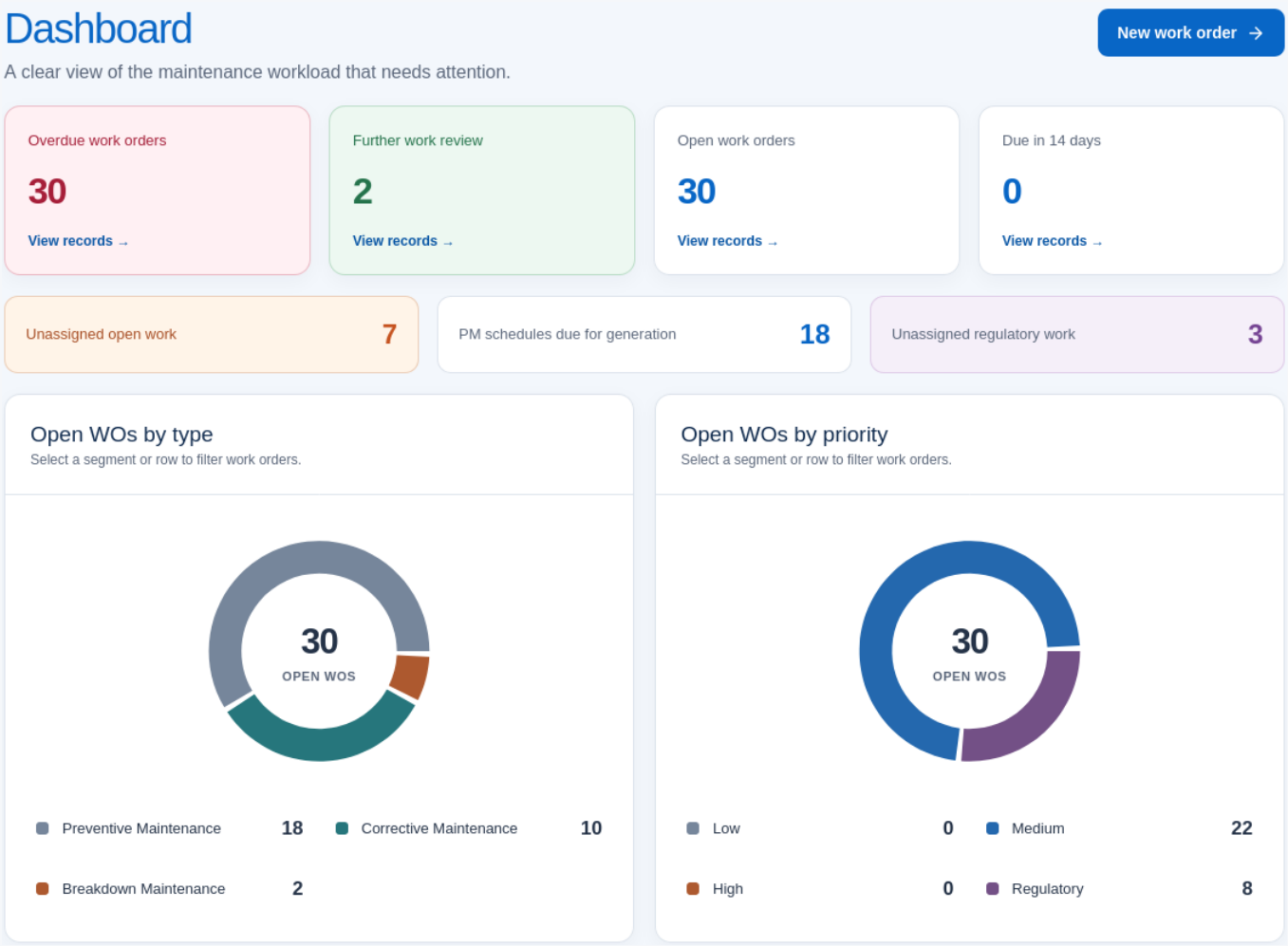
Micro CMMS

MICRO CMMS USER GUIDE

Maintenance.
Made manageable.

Set up your operation. Create your assets. Keep maintenance moving.



START HERE

Your route through the guide

Set up your organisation, create equipment records and maintenance plans, then use the web or mobile workflow for daily work.

Setup your organisation 3–6
Settings, lists, meters, users and roles

Create and maintain assets 7–8
Equipment records, status and meter readings

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Troubleshooting and practical checks

Using this guide. Follow the procedures with your organisation’s records. Select Save, Save progress or the relevant action to commit changes. Screen layouts and available actions depend on your role. Use the percentage selector in the header to adjust the workspace view.

SETUP

Set the foundation

Administrator / Open Setup before creating assets or preventive maintenance schedules.

Organisation
Name and units

Structure
Lists and meters

People
Roles and teams

Confirm the organisation name

In **Organisation details**, enter the tenant, contract or business name your team should see. Select **Save organisation name** and check the confirmation.

Choose planning units

In **Units**, choose Currency, Duration and Hours per working day. Select **Save**. Currency changes how estimates are displayed; stored numeric values are unchanged. It does not convert amounts or hide existing estimates.

Read decimal time correctly

1.25 hours means 1 hour 15 minutes. With an eight-hour day, 1.25 days means 10 hours. Changing the display unit preserves the underlying duration. Actual labour is always recorded in hours.

Set the working calendar

In **Scheduling**, choose a fixed Timezone offset such as GMT+10:00. Choose Shift start and Shift finish in 30-minute steps, plus Working days, then select **Save**.

Keep units and shifts distinct

Hours per working day converts durations shown in days. Shift hours control placement on the scheduling timeline. Review both; one setting does not automatically change the other.

Review existing planned work

Changing a shift does not reschedule saved jobs. Fixed GMT offsets do not adjust for daylight saving. A timezone change preserves saved start instants; review the displayed schedule after either change.

Before moving on: confirm the organisation name, currency and working calendar with the team. One standard daytime shift applies to the organisation; individual rosters and overnight shifts are not supported.

SETUP

Build the shared choices

Create the values your team will select on assets, work orders and PM schedules. Review existing entries before adding more.

Configure the lists

Choose a **Setup list**. Enter a short Code and a clear Name, then select **Add to** followed by the list name. Codes are uppercase. Use 2–3 characters for Sites, Asset classes, Functional locations, Priorities and Teams; use 2–4 for Meters, Work categories, Work types and Statuses. Names are not shortened.

Sites The facility where equipment belongs.

Functional locations The operating area, such as wash and sanitation.

Asset classes Equipment groups. Asset statuses are fixed core choices on each asset.

Work classifications and teams Review categories, priorities, work-order statuses and team names before assigning work.

Retire values without losing history

Unused entries can be deleted. Referenced entries become inactive to retain history. Work types, work-order statuses, Regulatory priority and the required Repair category are core workflow choices and cannot be deleted.

Configure the meter catalogue

Choose **Meters** in Setup list. Operating hours, Cycles and Odometer are fixed core choices. To add another measure, enter Meter name and Unit, then select **Add meter**.

Use the unit your readings actually record, such as Litres. Units stay fixed after creation. Unused custom choices can be deleted; used choices become inactive so readings and PM links remain available.

Create users and assign access

Select **Users & roles**. Enter Name, Email, Role, optional Team and a temporary password, then select **Create user**. The person must change the temporary password at their first sign-in.

Create teams before allocating users to them. A team assignment alone does not place a job in every technician’s personal work list. Assign a technician when individual ownership is required.

Ready to create the first asset

Check that the required site, location, class and asset status are available. For meter-based maintenance, confirm the meter choice exists in Setup; you will attach it to the individual asset next. Only administrators manage Setup. Supervisors can manage maintenance records; technicians use their assigned-work view.

SETUP

Give people the right access

Administrator / Setup > Users & roles. Create teams before assigning users to them.

Create an account

Enter Name and Email, choose Role and an optional Team, and supply a temporary password of 8–16 characters. Use Show or Hide to check it, then select **Create user**. Provide credentials through your organisation's secure process.

Complete the first sign-in

The user signs in at login.microcmms.com and replaces the temporary password when prompted. Check that the organisation name and available menu items match their role. The desktop menu opens the web areas; recognised mobile devices open the Technician Workspace.

Edit a user

In Current users, select **Edit**. Update name, email, role, team or active status, then select **Save user**. Cancel closes the edit without committing changes. Confirm the saved access before handing the account over.

Reset a forgotten password

Use the person's password reset control in Users & roles to issue a temporary replacement. They must change it at the next sign-in. A signed-in user can change their own password from My account or mobile Account.

Administrator

Manages organisation settings, the meter catalogue, user access and maintenance operations. Setup is administrator-only.

Supervisor

Manages assets, PM schedules, work planning, scheduling and further-work decisions. A supervisor cannot access Setup or administer users.

Technician

Carries out assigned work, can create manual CM/BM jobs only for themselves, and can consult assets, PM schedules and forecasts. Cannot edit asset or PM configuration, refresh forecasts or change scheduling. Personal open-work lists exclude jobs allocated only to a team.

Deactivate without deleting history

Use **Deactivate** when access is no longer required; use Reactivate to restore an inactive account. Review open assignments separately. Historical assignments remain visible, but inactive people cannot receive new scheduled work.

Keep assignment and access separate

A team groups people and jobs. An Assigned user identifies the person responsible. Desktop and mobile layouts retain the same account permissions.

SETUP

Check readiness before handover

Administrator / Use this checklist once the detailed Setup steps are complete. Tick a printed copy as each item is confirmed.

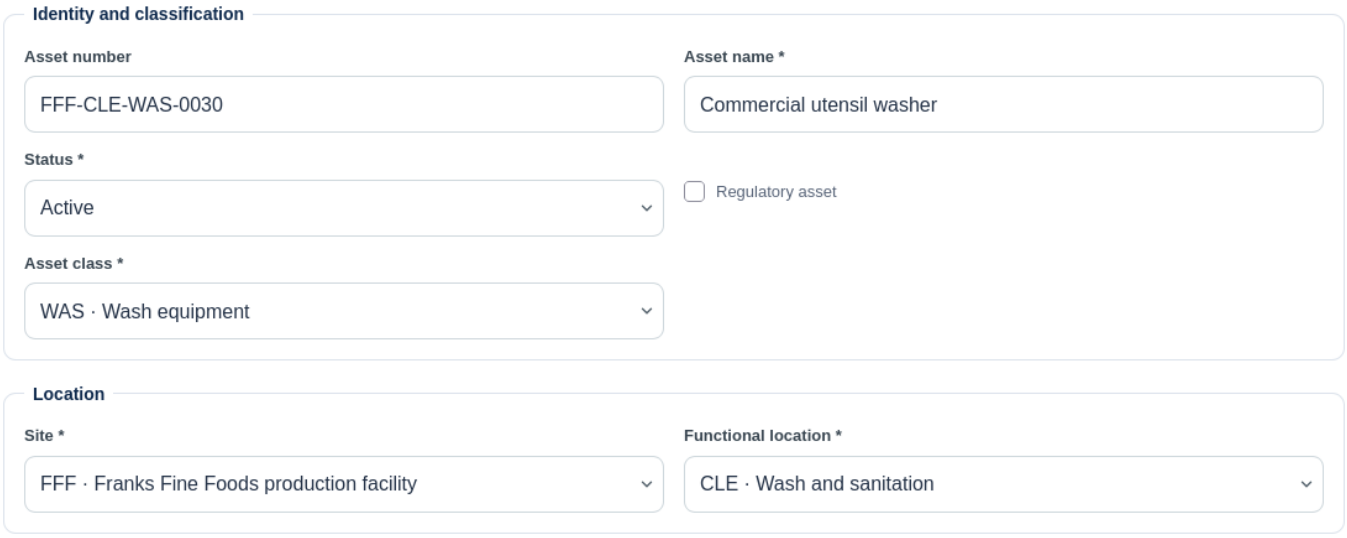
- ☐ **Organisation and units**
  Confirm the organisation name, currency, duration unit and hours per working day. See page 3.
- ☐ **Working calendar**
  Confirm timezone, working days and shift start/finish. Review any existing scheduled work after a change. See page 3.
- ☐ **Sites and functional locations**
  Check that the facilities and operating areas needed for the first assets exist and are clearly named. See page 4.
- ☐ **Asset classes and statuses**
  Review equipment groups and operational states; avoid adding duplicate choices. See page 4.
- ☐ **Work classifications and teams**
  Review work types, categories, statuses, priorities and teams before assigning maintenance. See page 4.
- ☐ **Users and roles**
  Create users, allocate Administrator, Supervisor or Technician access and confirm first sign-in. See pages 4–5.
- ☐ **Initial asset**
  Create and save the first asset. Reopen it and confirm identity, classification, location and equipment details. See page 7.
- ☐ **Required meters**
  Where maintenance is usage-based, configure the catalogue, attach the meter to the asset and record a valid initial reading. See pages 4 and 8.
- ☐ **First PM schedule**
  Save the required trigger, interval, basis, lead time and work-order defaults against the correct asset. See pages 9–10.
- ☐ **Forecast and first work order**
  Review the forecast horizon and dates, refresh where required and generate eligible work. Confirm the resulting work order, assignment and plan. See page 11.

ASSETS

Create a usable asset record

Administrator or supervisor / Open Assets and select New asset.

Start with a name that identifies the equipment clearly. Choose its Status, Site, Functional location and Asset class, then select **Save asset**. The permanent asset number is generated on save; check it before printing a label.



Saved asset: Commercial utensil washer. The crop shows identity and classification together with its location.

Add identifying information

Record known equipment identifiers. Select Save equipment details after entering make, model, serial number and installation date. Add a manual or procedure URL; the application stores the link, not the file.

Use the regulatory flag deliberately

Regulatory assets apply Regulatory priority to new and existing open work. Closed work retains its history. Clearing the flag does not automatically downgrade existing jobs.

Attach a meter if needed

Open **Asset meters**, choose a meter from the Setup catalogue, enter the initial reading and select **Add meter**. Only meters attached to this asset are offered on its PM schedules. Actual usage readings are recorded when completing meter-driven work.

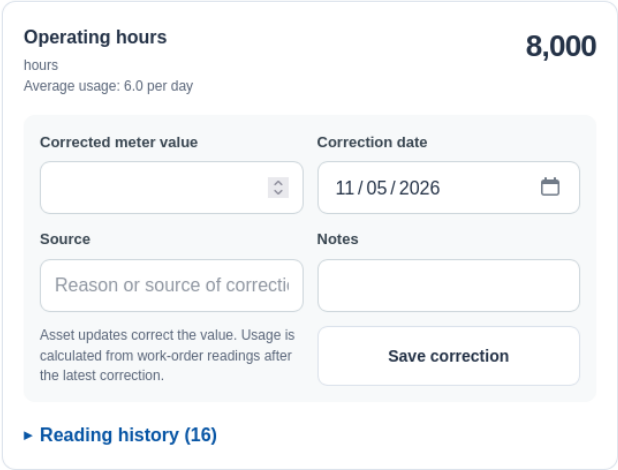
Check the result

Reopen the asset and confirm its classification, location and meter. Assets show active records by default; change Status to find inactive or disposed records.

ASSETS

Maintain meters and asset history

Administrator or supervisor / Open the asset. Technicians can consult its details and history.



Air compressor: configured hours meter and correction controls.

Add the correct meter

In **Asset meters**, select a choice from Setup, enter the Initial reading and select **Add meter**. The catalogue defines the measure and unit; the asset stores its own reading history. Do not use an hours meter for a different measure.

Save a meter correction

On a configured asset meter, enter the correction value, date, Source and optional Notes. Select **Save correction** and check the result and Reading history. Asset-page updates are corrections whether the value rises or falls; they do not count as equipment usage.

Rebuild usage history after a correction

Usage predictions require two actual work-order completion readings after the latest correction. Until then, meter predictions show insufficient history; combined schedules use their calendar trigger. Do not enter an artificial reading to force a forecast.

Read the meter history

Expand **Reading history** for dated values, sources and recorded-by details. Completion readings represent usage; corrections retain a separate audit trail.

Keep classification and equipment current

Use **Save asset** for identity/location; use **Save equipment details** for make, model, serial and installation date. Check links.

Retire and find an asset

Set Active, Inactive or Disposed as appropriate. The register defaults to Active; change Status to find other records; the list updates automatically. Clear filters changes visibility, not asset status.

Review current work

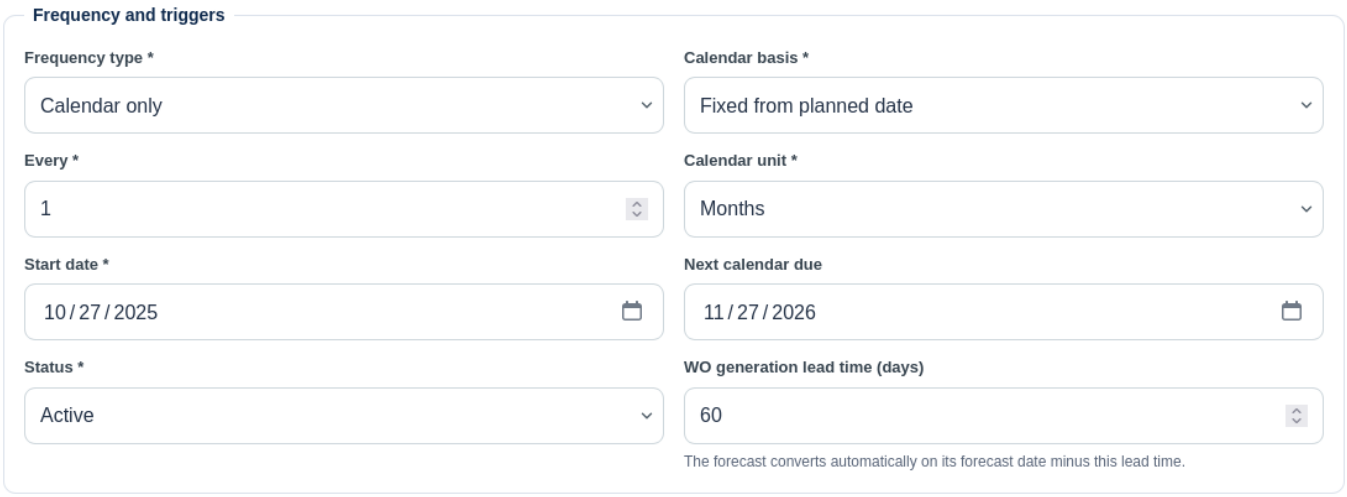
Asset and PM records list **Open work orders**; assets list active PM schedules. Use Work orders status filters for closed jobs. QR scans retain recent history.

PREVENTIVE MAINTENANCE

Turn a routine into planned work

Administrator or supervisor / Open PM Schedules and select New PM schedule.

Select the asset, enter a clear PM description, and choose Work category and Priority. The example below is the existing monthly inspection for the Commercial utensil washer. It uses a calendar trigger; it does not require an asset meter.



PM schedule PM-00018: every 1 month, fixed from planned date, with a 60-day generation lead time.

Choose the trigger and basis

Use **Calendar only**, **Meter only** or **Calendar and meter**. For calendar work, choose Fixed from planned date or From actual completion, then set the interval and first due date.

Set the work-order defaults

Enter estimated duration and cost, the team and any assigned user. Add a practical work plan and external procedure link, then select **Save PM schedule**.

Review the forecast

Check the due date and generation date in **Forecast**. The lead time controls how early the work order can be created; it does not change the due date. Use **Generate due work** when required.

When a meter is missing

Choose Configure in Asset, add the meter in the new tab, then return and select Refresh meters. Your unfinished PM stays open. Inactive PM schedules and inactive or disposed assets do not generate new PM work.

Choose the right basis: Fixed from planned date keeps the calendar cycle tied to planned dates. From actual completion starts the next interval from completion. Calendar basis applies to calendar and combined schedules; meter-only work follows meter thresholds.

PREVENTIVE MAINTENANCE

Choose the maintenance rule

Administrator or supervisor / Match the schedule to the way the equipment is maintained.

Calendar only

Use a time interval such as every 3 months. Choose the calendar basis, interval, unit and First due date when creating the schedule. A saved schedule also shows its next calendar due. Days, weeks, months and years are available.

Fixed from planned date

Use a fixed basis when the calendar cycle should stay tied to planned dates. Completing a task late should not be treated as a reason to shift the intended cycle. Review overdue work separately. Fixed forecasts start beyond cycles already covered by generated PM work orders, avoiding duplicate earlier cycles.

From actual completion

Use this basis when the next calendar interval should begin from the work's actual completion. Completing generated PM work updates the relevant completion-based calendar timing. Only the current completion-based cycle is planned; the next waits for the current work to finish. Select the basis before generating work.

Meter only

Configure the required meter on the asset first. Select that meter and the **Every meter units** interval. The threshold is usage-based; its predicted date depends on actual completion readings. Fixed meter plans advance by the configured interval. Calendar basis does not control meter-only schedules.

Calendar and meter

Configure both triggers. The earliest predicted event determines the maintenance requirement. Continue to record reliable meter readings even where the calendar trigger currently comes first.

Write instructions that can be used

Give the PM a clear description and work category. Add the work plan, procedure link, estimated duration and cost, team and optional assigned user. PM work orders inherit these defaults when generated. Later PM edits do not rewrite work already generated.

Use lead time for preparation

WO generation lead time sets how far ahead of the forecast date a work order can be created. The default is 60 days and the field accepts 0–365. It changes the preparation window, not the actual maintenance due date.

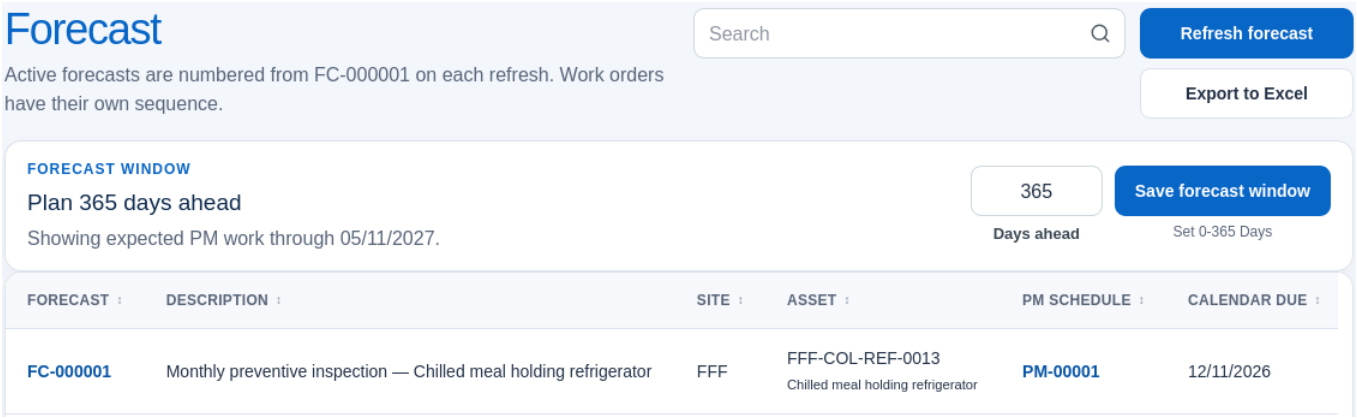
Pause a routine carefully

Set a PM schedule Inactive when it should stop producing new work. Inactive PMs and inactive or disposed assets are excluded from forecasts and cannot generate new PM work. Refresh removes pending forecasts; existing work orders and internal maintenance history remain. Use Status and Filter to find inactive PMs.

PREVENTIVE MAINTENANCE

Review the forecast before release

Administrator or supervisor / Forecast provides the forward view of recurring maintenance.



Forecast horizon, refresh and export controls. Scroll the live table horizontally to review all dates, controlling basis and status.

Set the planning horizon

Enter **Days ahead** from 0 to 365 and select **Save forecast window**. This saves the setting only; it does not refresh forecasts. Use **Refresh forecast** after planning inputs or readings change. See page 12.

Read dates in context

Calendar due is the time-based requirement. Predicted meter due estimates when usage reaches the threshold. Forecast date is the controlling expected maintenance date; WO generation date applies the schedule's lead time.

Generate eligible work

Use **Generate due work** in PM Schedules for eligible occurrences. Manual generation uses existing eligible forecasts in chronological cycle order; refresh outdated forecasts explicitly first. After completion, review the created jobs, assignment and dates. Each job retains its forecast meter target.

Use temporary FC references

Refresh numbers the active, unconverted list from **FC-000001**. These labels can change; converted items leave this list. Generated work orders receive the next independent WO number, which never changes. Internal links retain the originating PM and meter target.

Understand the controlling basis

FIXED means the calendar interval controls the due date. **METER PREDICTED** means expected usage controls it. Insufficient history means the meter prediction needs more reliable reading history; it is not proof that maintenance is unnecessary.

Review changed forecasts

Refresh recalculates pending work; it does not rewrite existing work orders or history. Inactive PMs and inactive/disposed assets cannot generate new PM work. Technicians can view forecasts but cannot refresh or configure them.

PREVENTIVE MAINTENANCE

Let planning finish in the background

Administrator or supervisor / Refresh forecast and Generate due work use the planning queue. Saving a forecast window stores the setting only.

Submit one planning request

Save the required forecast window, then choose the refresh or generation action. A queued or running request keeps the related controls grey. Do not repeatedly submit because results have not appeared immediately.

Watch the header progress

The header shows Queued, Refreshing forecast or Generating work, with the phase and processed count. Manual generation uses the saved forecasts; daily automation refreshes first, then generates. A progress count is not the number of new jobs.

Continue ordinary work

You can navigate to another screen while processing continues. Returning does not start another request or clear its busy state. The page refreshes when processing finishes; read the completion message and inspect the results.

Recover from a stopped request

Read the failure message. An authorised administrator or supervisor can select Retry. Work resumes from committed batches; already generated work is not duplicated. If account access changed, sign in with an authorised account before requesting work again.

A browser interruption is not cancellation

Losing the connection or closing a tab does not prove the background job stopped. Reconnect and check the latest status before submitting again. Preserve unsaved edits elsewhere before refreshing a page.

Interpret dates and timestamps

Due dates are calendar dates; status and preparation timestamps are instants displayed in the organisation timezone. Saving an asset, PM, meter correction, completed job or forecast window does not refresh forecasts. Fixed GMT offsets do not adjust for daylight saving.

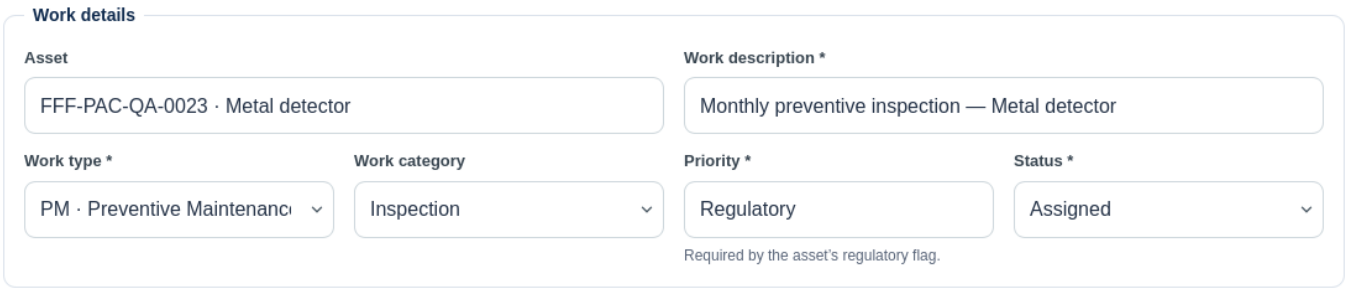
Keep the reporting scope clear

Forecast work is planned future maintenance, not completed work. When enabled, daily automation runs at the configured local time each day. It refreshes forecasts and generates due work through the same queue; processing can add a delay.

WORK ORDERS

Create corrective or breakdown work

Web / Open Work Orders and select New work order. Mobile uses My Work > New work order.



Work details on an existing generated PM job. The PM source fixes its type; manual jobs are created as CM or BM.

Identify the asset and task

Select the Asset and enter a concise **Work description**. Choose CM for an identified defect or BM for work arising from equipment failure. Both manual types use Repair as their work category.

Set priority and ownership

Choose Low, Medium or High according to your organisation's practice. Regulatory priority is applied automatically to regulatory assets and is unavailable on other assets. Choose an Assigned user and/or team where available. Confirm who is expected to take the job.

Write and save the plan

Add instructions, relevant document link, due date and planning estimates. Supervisors and administrators can set the Scheduled date. Select **Save work order**; the application assigns its permanent WO number.

PM work starts with the PM schedule

Manual creation supports CM and BM. Generate PM work from its schedule or forecast so that the asset, recurring requirement and FC history stay linked. A PM work order's type remains PM.

Technician-created work

Technicians can create a CM or BM job from web or mobile. The scheduled date is reserved for supervisors and administrators. Technician-created jobs are assigned to the creating technician. Only a supervisor or administrator can change the assigned user.

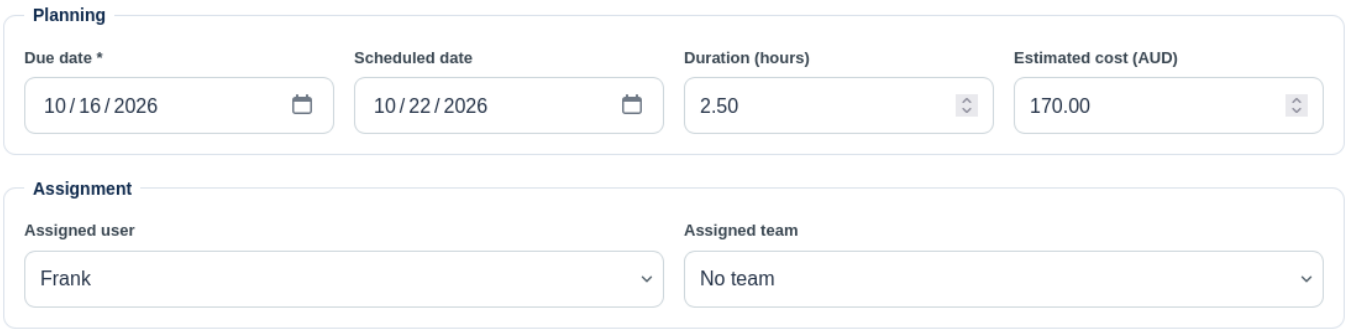
Use the record links

Open the asset from the work order to consult equipment details. PM records also link to their source schedule and originating forecast. Record details retains lifecycle, creation and update information; closed jobs retain their completion history.

WORK ORDERS

Plan clearly and close explicitly

Web / Open a work order you are authorised to update. Save planning edits before completing it.



Due date, scheduled date, estimates and assignment are separate planning controls on the saved work order.

Scheduled date and due date

Scheduled date records when work is planned. Due date records when it must be completed. Today follows the organisation's timezone; work due today is not overdue. Web and mobile use the same calendar-day rule. Moving a job on Scheduling does not change the due date. Use Scheduling to set or change the planned start hour.

Duration and cost

Planning duration follows the Units setting. 1.25 hours is 1h 15m; 1.25 days is 10h where a day is 8h. Decimal fields accept .25 for 0.25. Estimated cost is a planning estimate, not actual expenditure; existing numeric amounts are not converted. The current organisation currency controls display.

Review and save the record

Update the permitted fields and select **Save work order**. Closed work is retained in history and protected from ordinary edits. Follow the organisation's process when cancelling work; do not treat cancellation as successful maintenance.

Record the completion

Review the instructions and enter **Completion notes** describing work completed and findings. Enter Actual labour hours in the web Complete work panel. Completion is a separate explicit action; a planning save is not enough. Mobile Save progress can record labour before completion. See page 15.

Enter a required meter reading

For meter-driven PM, enter the current applicable reading. The completed job records it against the asset. Forecasts recalculate on explicit manual refresh or daily automation. Technicians can supply this reading while completing assigned work without being able to edit asset meter configuration.

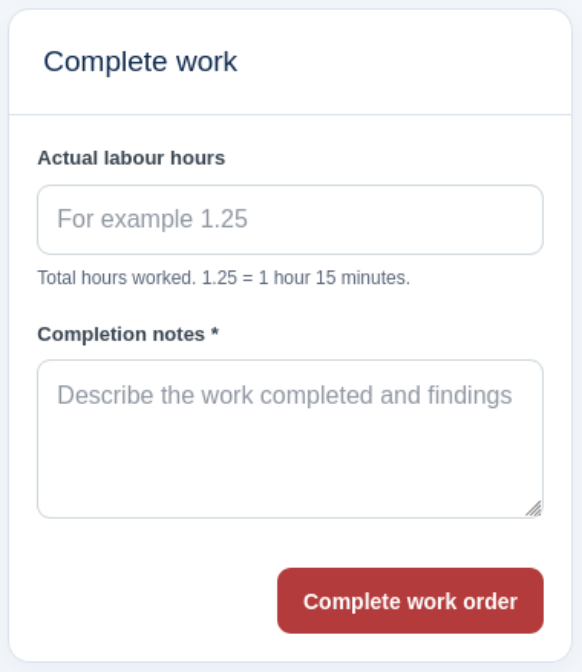
Complete and check the outcome

Select **Complete work order** and confirm any prompt. Check the completion result and saved notes. The job leaves the technician's open list. To review it later, a supervisor or administrator can choose Completed or All in the work-order list.

WORK ORDERS

Record the time actually worked

Web / Actual labour hours belongs to Complete work. Mobile can save it during execution as well.



Complete work: actual labour, completion notes and the final action remain in one panel.

Enter total actual hours

Open the work order and go to **Complete work**. Enter **Actual labour hours** as the total time spent on this job, not an increment to add. If mobile progress already saved a value, check and retain or correct it before completing.

Use hours in every view

Actual labour is always in hours, even when planned duration is shown in days. Enter .25 or 0.25 for 15 minutes; 1.25 is 1 hour 15 minutes. Use zero for a known zero, and leave blank when no actual value is known. Do not enter a guessed value.

Complete with a useful record

Enter Completion notes, then the applicable meter reading for meter-driven PM. Review actual labour and select **Complete work order**. Check the success result. A planning **Save work order** does not submit the separate completion fields.

Understand the reporting effect

Reliability labour variance compares completed jobs with recorded actual hours and a positive planned duration. Missing actual hours are excluded rather than assumed to equal the plan. MTTR is a separate elapsed-time measure; actual labour does not replace it.

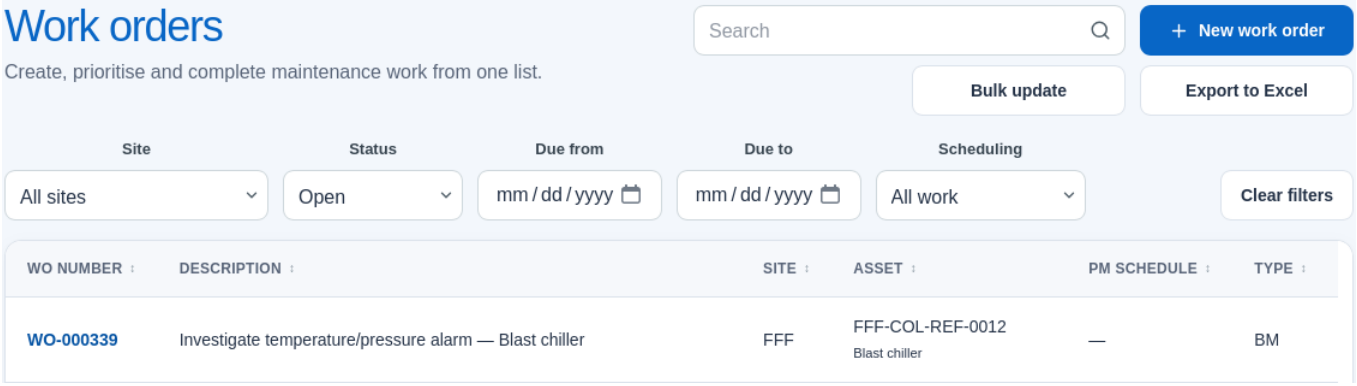
One record across devices

Web completion and mobile execution use the same Actual labour hours value. Select Save progress on mobile to retain time before closure. Use non-negative decimals with up to two decimal places. A blank value means not recorded; it is different from zero.

WORK ORDERS

Update a matching set of jobs

Administrator or supervisor / Filter the work-order list before selecting Bulk update.



The web work-order list exposes Site first, followed by status, due-date and scheduling filters and Bulk update. Available actions depend on your role.

Define the matching list

Use search and filters to isolate the intended work. Review the records, then select **Bulk update**. The popup includes **all matching work orders**, not just the rows currently visible on screen. Check the count before proceeding.

Choose only the intended changes

Choose Status and Assigned user, set a Scheduled date or tick Clear scheduled date, and enter Completion notes where needed. **No change** preserves an existing value. Leaving the date blank preserves it unless Clear scheduled date is selected.

Apply or leave the batch

Select **Update** to commit the batch, or **Back** to return without saving. Review the list afterwards to confirm the intended status, date and assignment.

Notes are appended

Bulk completion notes are added to existing notes. They do not replace the maintenance history. Notes are required when completing work, so use wording that is accurate for every included job.

Some work must be handled individually

Closed work orders are protected. Meter-driven completion requires the individual job’s applicable reading and must be completed separately. Refine the list rather than forcing mixed eligible and blocked jobs through one batch.

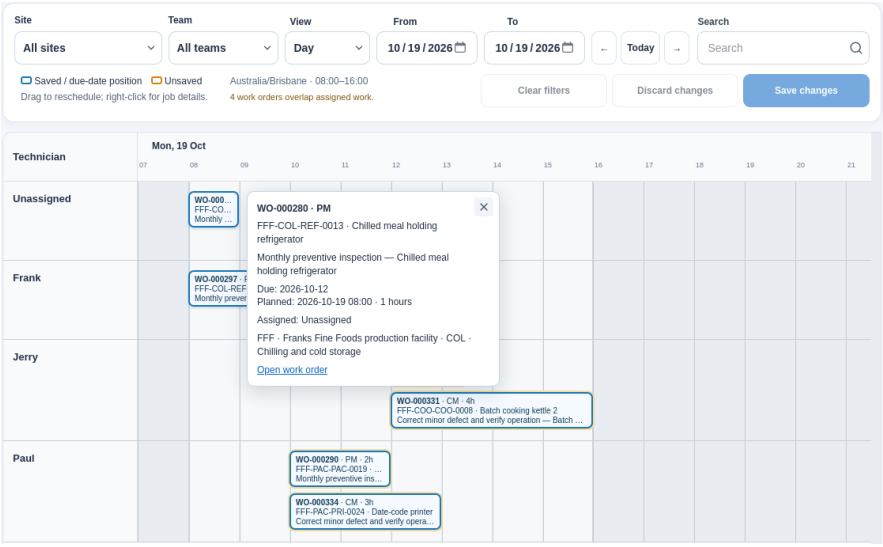
A stopped batch saves nothing

If a record changes or cannot be updated, the whole batch stops. Review the reported record numbers, reload current data and refine the list before retrying. Do not assume that the unaffected jobs were saved.

SCHEDULING

Place work on the timeline

Administrator or supervisor / Open Scheduling. Technicians can view their own open work without editing it.



Site and Team controls above the timeline. Right-click a job for details.

Choose the date range

Select Day, Week, Fortnight or Month. Use From, To and the date navigation controls to reach the required period. Scroll horizontally or vertically to inspect additional time and technicians.

Narrow and inspect the work

Site filters asset locations. Team filters the WO team and technician membership; All restores each wider view. No team selects unset teams. Search matches WO, asset, team and location; all words must match. For oversized results, narrow the dates or filters; no partial schedule is shown. Right-click a bar for details.

Watch the duration

Bars reflect the actual amount of planned time even when duration is displayed in days. With no duration entered, the timeline uses a temporary two-hour display. That becomes the saved duration only after scheduling and saving the job.

Keep the due date separate

Dragging adjusts the planned start or assignee. It does not change the job’s due date or overdue calculation. Undated work appears below the timeline; open that job and enter an appropriate date before planning it on the timeline.

Drag to the planned position

Move a bar to a start time or another technician’s row. With a job focused, use Left/Right to move by 30 minutes and Up/Down to change rows. Use Unassigned when individual ownership has not been allocated. Placement aligns to working time in half-hour increments. Work beyond shift end continues on the next working day.

SCHEDULING

Save the plan and handle changes

Administrator or supervisor / Review every outstanding adjustment before committing the schedule.

Orange means unsaved

Moved jobs use an orange border until saved. Blue borders indicate saved positions or an initial due-date position. Select **Save changes** to commit all outstanding adjustments, or **Discard changes** to restore the last saved positions.

Filters preserve your planning

Site, Team, Search and date changes retain unsaved work. Save changes commits every outstanding adjustment, including hidden work. Discard changes clears them all. Clear filters resets Site, Team and Search, preserving dates, view and unsaved work. Filtering never changes the job's team or assignee.

Review overlap warnings

When jobs assigned to the same technician overlap, Micro CMMS displays a warning. You can save an intentional overlap, but check capacity and the work instructions before doing so. The warning does not mean the application has resolved the conflict.

Recover from a conflicting edit

If another person changes affected work while you are scheduling, the conflicting batch is prevented from saving. Reload the schedule, review the latest assignments and dates, then make the intended changes again.

Know where an initial bar comes from

Placement uses a saved scheduled start first, then Scheduled date at shift start, then Due date at shift start. A blue bar can be an initial due-date position rather than evidence of a deliberately saved start.

Working periods

White periods represent working hours and grey periods non-working time. Administrators choose a fixed GMT offset, working days and shift start/finish in Setup. The default is Monday to Friday, 08:00–16:00, with one standard daytime shift. Start and finish may be set on the hour or half hour, such as 08:30–16:30.

Calendar changes are deliberate

Changing working hours does not automatically reschedule existing work. Fixed GMT offsets do not adjust for daylight saving. A timezone change preserves the underlying instant of saved scheduled starts. Review the display and jobs near shift boundaries after making either change.

Team and assignment

Team filters WO teams and user membership separately. Matching work assigned outside the selected team appears in Outside selected team, retaining its real assignee. Drag it to an active visible user or Unassigned; the job's team stays unchanged. Existing inactive assignments remain visible.

A practical handover

Before the shift, review overdue and unassigned work, confirm job durations and intended technicians, resolve unexpected overlaps and save the plan. Tell the team about the saved priorities and any deliberate exceptions.

FURTHER WORK REVIEW

Turn findings into follow-up work

Technicians report additional maintenance. Administrators and supervisors review the request.

Report the finding from the job

In the Technician Workspace, select **Further work is required** and describe the issue. Save progress or include it when completing the job. Report what was found and what remains to be done. This does not automatically create another work order.

Open the review queue

From the web dashboard, select **Further work review**. Its count represents requests awaiting review, including earlier reports. Open a request and read the original work order, asset, reported findings and any completion notes.

Decide what action is needed

If maintenance is required, complete the corrective work details and select **Create CM work order**. Review the description, plan, priority, due date, duration, cost and review notes. Regulatory asset priority remains locked where applicable.

Assign the follow-up job

The review creates one **unassigned CM work order** against the same asset and links it to the source report. Plan and assign that new job through Work Orders or Scheduling. Creating follow-up work is not the same as assigning it.

Record a decision to take no action

If no further work is needed, enter a Reason and select **Discard request**. This records the decision while retaining the original report and maintenance history.

Find reviewed requests

Use Status > Reviewed or All to revisit earlier decisions. The saved outcome includes reviewer, date and notes, and a link to any follow-up work order. The process prevents duplicate follow-up jobs for the same request.

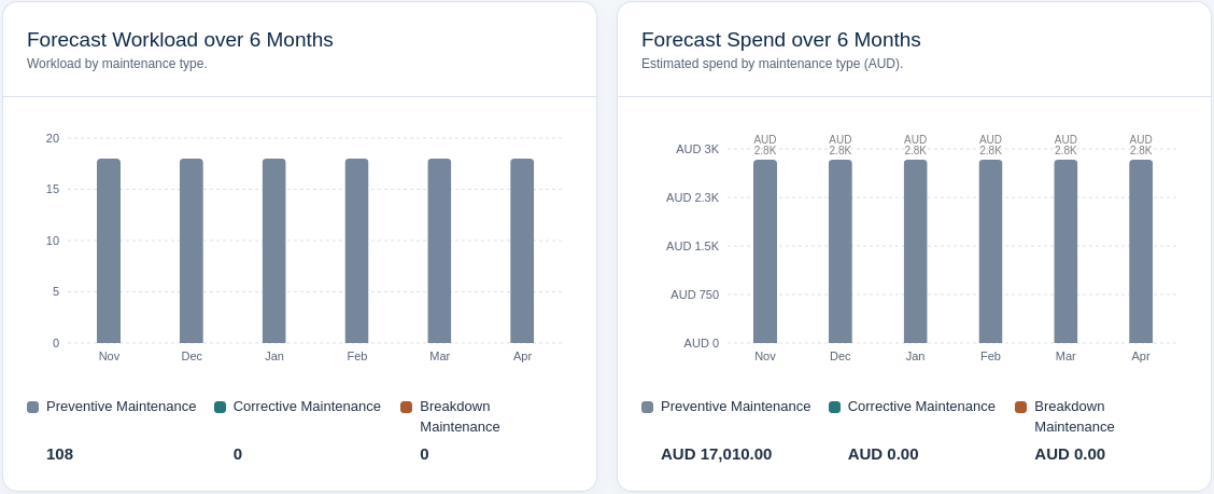
Respect the role boundary

Technicians report findings through the work order. Review decisions belong to administrators and supervisors. If the record changes before you save a decision, reload and review the latest information instead of repeating the action blindly.

DASHBOARD AND LISTS

Read the maintenance picture

Web / Start with the dashboard, then open the records behind a summary or chart.



Dashboard workload and estimated-spend charts grouped by maintenance type.

Use the summaries as entry points

Select a summary card, donut segment or legend row to open the matching records. Administrators and supervisors see Further work review and Unassigned regulatory work. Technicians see assigned work due today, including zero when none is due. Use the percentage selector in the workspace header to fit more on screen.

Forecast workload

The six-month chart covers the current month and the next five months, based on due dates. It groups counts by CM, BM and PM. PM combines open PM work orders and ungenerated forecast occurrences; a converted forecast is counted through its work order only.

Review what needs action

Use overdue work to review missed due dates, unassigned work to allocate ownership and due-work summaries to prepare the near-term plan. Open the records before making a decision about priority or capacity.

Forecast spend is an estimate

The six-month spend chart groups planning estimates by maintenance type. PM includes estimates from ungenerated forecasts and generated PM work orders without double counting. It is not a record of actual expenditure or paid invoices.

Check currencies and omissions

Spend totals use the currency selected in Setup. Missing estimates are excluded from the spend chart. Currency changes how numeric amounts are displayed; it does not convert or exclude existing values. Existing amounts are not converted. Reliability shows historical measures and completed CM/BM counts; see pages 32–33.

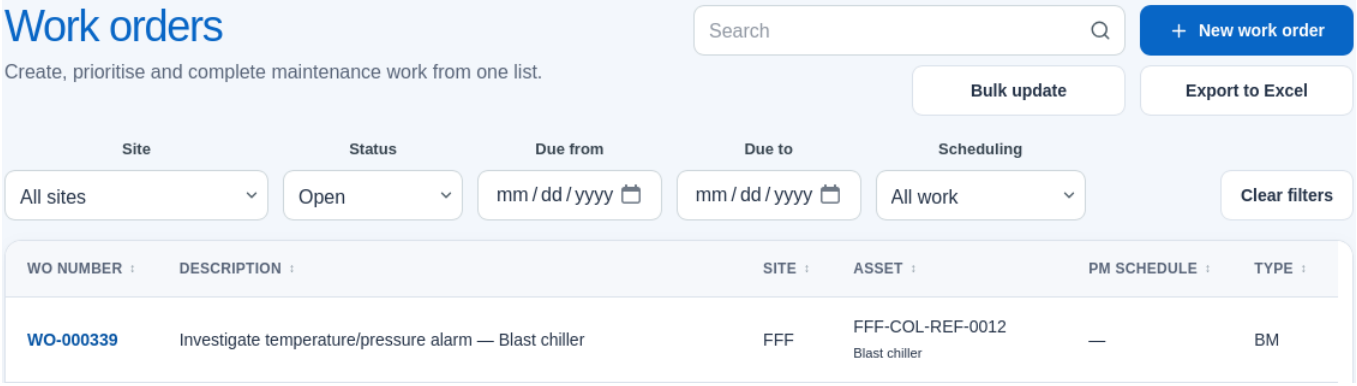
Know the scope of your view

Completed and cancelled work is excluded from forecast workload. Technicians see their assigned work. Counts depend on current records and forecast inputs; the totals reflect the selected records and reporting period.

DASHBOARD AND LISTS

Find records and export the right set

Web / Assets, Work Orders, PM Schedules and Forecast use consistent list controls.



Search and list criteria are separate from the records they display. Export and bulk actions use the selected matching set.

Choose the view first

Assets and PM schedules default to active records. Select Active, Inactive or All, and Disposed for assets, results update as soon as the selection changes. Work Orders defaults to open work; administrators and supervisors can choose Completed, Cancelled or All for history.

Search and narrow the results

Enter a useful number, name or description. General lists support text and wildcard searches. On web lists, search also matches site codes and names. Site is the first filter on Assets, PM schedules and Work orders. Choose All sites or a specific site; the list updates automatically. Work orders offers All work, Scheduled only and Unscheduled only; a Scheduled date makes a job scheduled. Due from/to filters Due date. For Scheduling, all words must match. For claiming unassigned work, use the exact full WO number instead.

Sort and export

Select a column heading to sort, then select it again to reverse the order. **Export to Excel** queues all matching records with the chosen filters and order, not just the visible page. Collect the file in **Exports**; see pages 22–23.

Reset controls clearly

Clear filters restores list defaults and resets filter boxes to their default or blank value. Dashboard and Reliability links open a pre-filtered list. Use its permanent Clear filters button to return to the default list. A search-clear control preserves other criteria. Mobile My Work uses **Clear** for its search and filters.

Visibility does not change the record

Showing inactive assets or schedules does not reactivate them. Clearing filters does not change status. Permanent QR links and asset history remain available; the batch QR generator still includes the full register, regardless of the list filter.

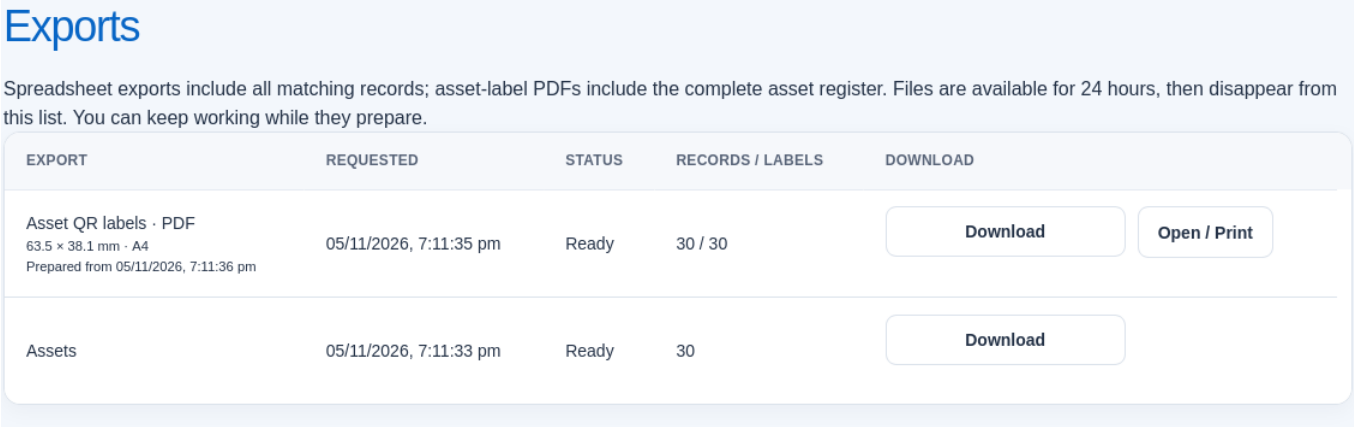
Follow the detail links

Open a record number to view the asset, WO, PM or FC. Use the available Back link to return to the originating list or record. For wide tables, scroll across to inspect the remaining columns rather than assuming a field is absent.

EXPORTS

Prepare files without waiting on screen

Web / Use Export to Excel on a list, or Print labels / Download PDF on the batch QR page. Collect completed files through Exports.



Exports in Franks Fine Foods: a ready asset-label PDF with Download and Open / Print actions.

Set the correct scope

For Excel, choose list filters and sorting before requesting the file. Assets, Work Orders, PM Schedules and Forecast include all matching accessible rows across pages. Bulk QR PDFs always include the whole asset register in asset-number order.

Queue once and keep working

Select the relevant export action. Queued · View exports or Label PDF queued · View exports confirms the request. Identical requests already queued or preparing reuse that job; repeated clicking does not make it faster.

Open Exports to collect it

Use Exports in the desktop menu or the confirmation link. Check the file type, requested time, progress and status. Select Download when Ready. Label PDFs also offer Open / Print in a new tab.

Understand the preparation snapshot

A label PDF uses the selected stock layout and an ordered asset snapshot taken when preparation starts. Later asset changes require a new request. The Prepared from timestamp helps identify that snapshot. Progress counts labels, not PDF pages.

Files belong to the requesting account

Files are private to the requesting account and organisation. Another user cannot collect your file using its link. Role, account or session changes may invalidate access. Sign in again and request a fresh file when necessary.

Review the finished labels

Open the prepared PDF to check the label layout before printing. Download it while the file is available in Exports.

EXPORTS

Collect, print and recover safely

Use the status and file type to choose the next action. Files remain available for 24 hours after completion, not indefinitely.

Queued or Preparing

The request is waiting or being processed. Keep working and let Exports refresh its status. Large exports may wait behind other jobs; a queue message is not a failure. Do not close and reopen requests to force a new run.

Ready

Download the spreadsheet or PDF. For labels, Open / Print opens the completed PDF in a new tab. Print from the PDF viewer at Actual size / 100%, on the matching stock. A downloaded copy can be retained under your organisation’s record-handling policy.

Failed

Read the error. Correct the input or access problem and select Retry where offered, or return to the source list and request again. Check the resulting record/label count before using the file. Contact your administrator if the fault persists.

Expired files disappear

Ready files expire 24 hours after completion and disappear from the list. Request a new export from the appropriate screen if the file is no longer listed. Do not treat the Exports list as permanent storage or a backup.

Busy queue or changed access

If the queue is busy, allow pending work to finish and try later. If your account, role or session changes, sign in again and create a request using current permissions. A copied URL is not a way around access checks.

Check times in the organisation timezone

Requested and Prepared from are shown in the organisation timezone. Queue time precedes preparation time; these are different events. Changing a display timezone does not change the underlying request instant or the 24-hour retention period.

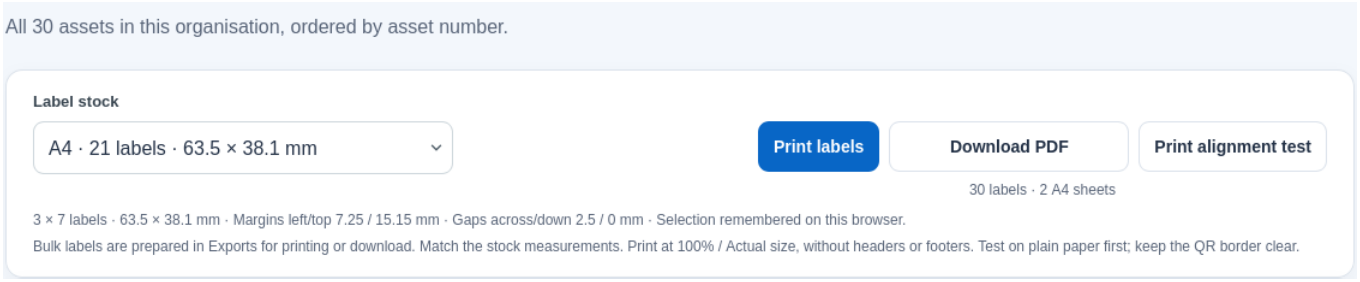
Check output before printing or sharing

Confirm the intended filters, register scope, stock dimensions and label counts. Protect exported maintenance and user information as company data. A spreadsheet or PDF is a snapshot and does not update the live records.

ASSET QR LABELS

Print labels that fit the stock

Web / Assets > Generate all QR codes. Use the individual asset's Generate QR action for one label.



Label stock controls. Complete PDFs are prepared in Exports; the bounded page preview appears below.

Choose the label layout

Select a saved A4 template, a label roll or **Custom** stock. Match label dimensions, sheet margins, gaps and layout against the packaging. The recommended asset-label size is 63.5 × 38.1 mm.

Review the complete preview

All organisation assets are included, ordered by asset number, regardless of active search filters. Review the one-page layout preview and use Previous / Next to inspect other pages. The preview is deliberately lightweight. Bulk PDFs start at label position 1; use a fresh sheet or roll.

Test and print

Use **Print alignment test** on plain paper first. **Print labels** and **Download PDF** both queue the complete PDF in the background. Open **Exports** when Ready, then choose Download or Open / Print. See pages 22–23.

Use the browser's saved settings

Stock settings are remembered in the current browser. Check them when changing computer, browser or label product. An offset saved by an older version is not used for bulk PDFs: each new job starts at the first label.

Keep the QR area clear

Use durable labels and compatible ink or ribbon for the equipment's conditions. Keep the code and its clear surrounding area unobstructed. Avoid stretching a downloaded label to fit different stock.

Keep physical tags current

The QR is a permanent asset link even if the name or number changes. Reprint the physical label after changing its printed information. The link requires authorised access in live use; it does not expose the equipment record to anyone who finds a tag.

If printing is unavailable

Check that you are signed in with an authorised account and have permission to generate labels. Allow a queued file to finish preparing before requesting another copy.

ASSET QR LABELS

Find equipment from its label

Generate an asset label from its equipment record, then print it at Actual size.

COMMERCIAL UTENSIL WASHER

FFF-CLE-WAS-0030

Franks Fine Foods
Wash and sanitation

Example label format. Generate the QR from your own asset record before printing.

From a label to the work

Open the asset

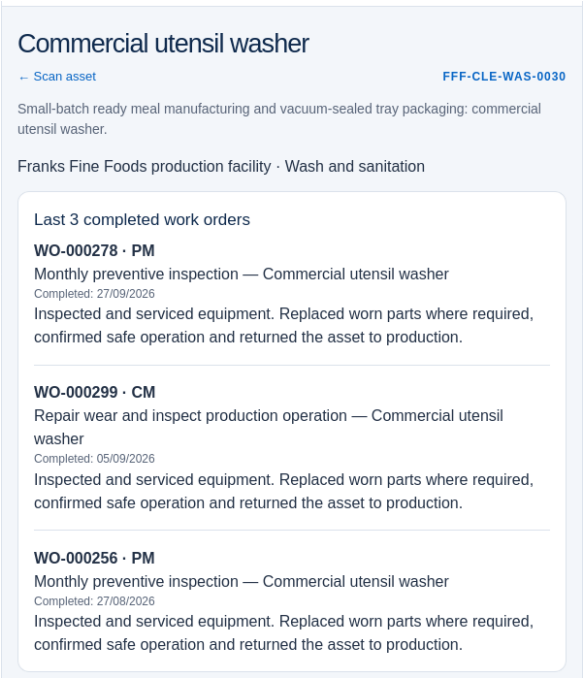
In the mobile workspace, choose Scan asset and Start camera. Allow camera access and point at a label. A phone camera can also open the link.

Review its maintenance

The asset page lists open jobs and the three most recently completed work orders, with status and assignment information.

Pick up eligible work

An open, unassigned job can be claimed. Work already assigned to someone else remains read-only.



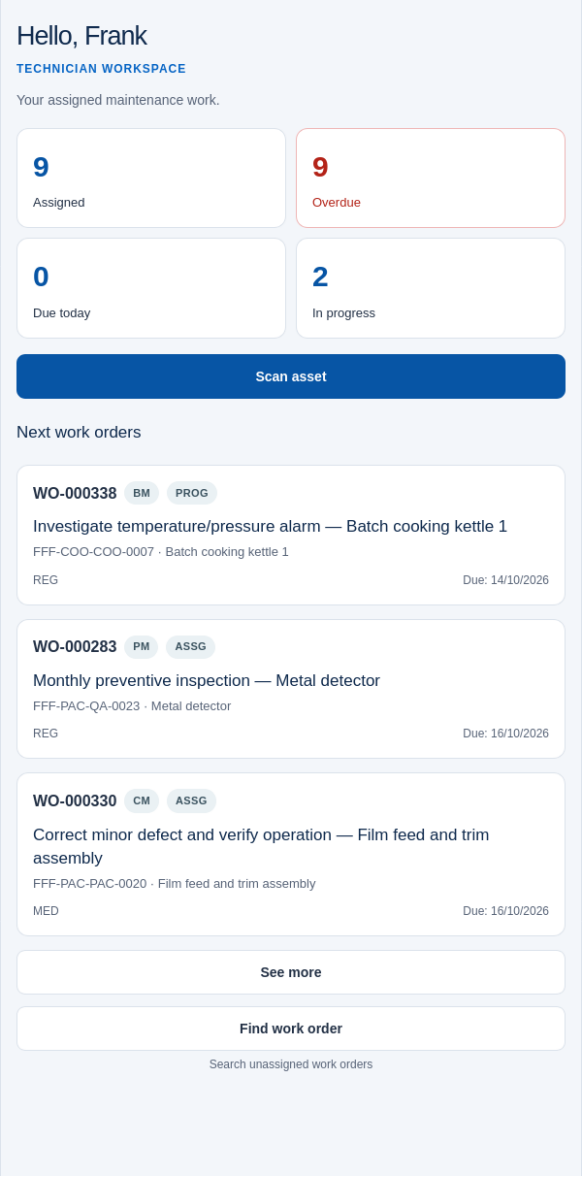
The scanned asset view shows equipment identity and recent completed work.

Print your own labels: open the asset and select Generate QR, or use Assets > Generate all QR codes for the complete register. Print at Actual size / 100%, with browser headers and footers off. Test alignment on plain paper first. Live asset links require internet access and authorised organisation access.

TECHNICIAN WORKSPACE

Start the shift from your phone

Mobile / Recognised devices open the focused Technician Workspace automatically. Layout choice does not change permissions.



Technician Workspace.

Read Home

Review Assigned, Overdue, Due today and In progress. The **Overdue** widget uses a red count, label and border to match the web dashboard. The next three work orders appear beneath the summaries. Select **See more** to open My Work, or select a summary to open the corresponding work list.

Use the bottom navigation

Home returns to the summary. **My Work** opens assigned open jobs. **Instructions** contains the user guide. **Account** shows account details, password and sign-out controls.

Open the job before starting

Review its asset, location, priority, instructions and due date. Read linked reference documents where provided. A planning estimate is not a record of the labour you actually spend.

Use the right layout

Recognised phones open the Technician Workspace automatically. Desktop browsers show the web interface. Both retain the same account permissions.

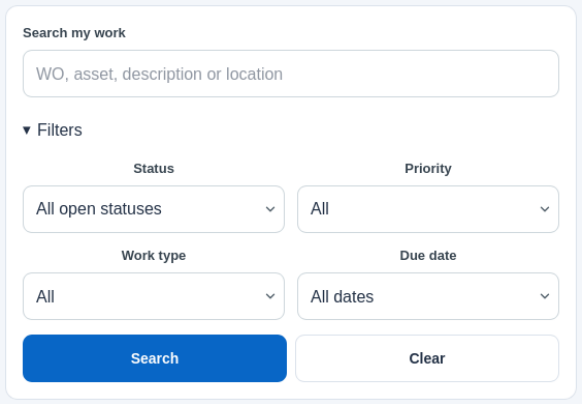
What belongs in your list

My Work contains your assigned Open, Assigned and In progress jobs. Team-only allocation does not distribute a job to every team member. Reassigned, completed or cancelled work leaves your personal open list.

TECHNICIAN WORKSPACE

Find the work you can act on

Mobile / My Work Orders contains your open assignments. Find work order locates eligible unassigned work by its full number.



Technician Workspace.

Search your assigned work

Search by WO number, asset, description or location. Expand **Filters** for Status, Priority, Work type and Due date, then select **Search**. Due-date choices include Overdue and Due today.

Reset or refine

Select **Clear** to restore default search and filters. Up to 50 matching jobs are shown, so narrow the criteria if needed. A Regulatory priority is required for work on a regulatory asset.

Find an unassigned job

Select **Find work order** and enter the complete number, for example WO-000001. Partial numbers, wildcard searches, asset names and descriptions cannot be used to discover unassigned work.

Claim and open it

Review the matching actionable unassigned job and select **Claim work order**. Once confirmed, open it from My Work. If someone else claims it first, refresh to see its latest assignment.

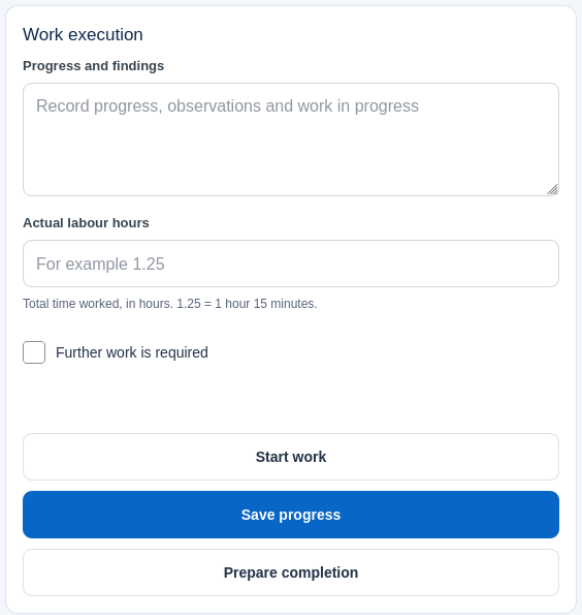
Reference is different from ownership

Asset scanning can show other technicians' jobs for reference. You cannot claim or modify a job already assigned to someone else. Claiming is checked when submitted, preventing two people from taking the same job.

TECHNICIAN WORKSPACE

Record progress as the work happens

Mobile / Open an assigned job, read its instructions and start work when you begin the task.



Technician Workspace.

Start the job

Select **Start work** if the job has not started. Review the due date, planned time and work instructions. Open a reference document where available. When already in progress, the start control is no longer needed.

Record findings and labour

Enter **Progress and findings** and **Actual labour hours**. Labour is always in hours: .25 means 15 minutes and 1.25 means 1h 15m. Enter the total time worked, independently of the planning estimate.

Report additional maintenance

Select **Further work is required** and describe the outstanding issue. A supervisor or administrator reviews the report and can create linked corrective work or record a reason to take no action.

Save without closing the job

Select **Save progress** to commit the current entries. Check the confirmation before leaving the record. Progress saving keeps the work open; completion is a later explicit action.

Use the keyboard without losing context

To dismiss the keyboard, scroll the page from outside the entry field. Scrolling inside a notes field keeps the keyboard open. Dismissing it does not save the entry.

TECHNICIAN WORKSPACE

Complete the job and protect your notes

Mobile / **Micro CMMS requires an active internet connection. Offline changes are not synchronised.**

Prepare the completion

After saving progress, select **Prepare completion**. Review Work performed and corrective actions and enter the completion notes describing what was done and found. Enter any applicable meter reading.

Record any remaining issue

Check Further work is required and its explanation before closing the job. Confirm actual labour and the current meter value. Completion requires notes and the applicable meter reading; the form shows the current recorded reading for comparison.

Complete or keep working

Choose **Keep working** to return to progress entry, or select **Complete work order** and confirm the prompt. Check the completion confirmation. The job is removed from your open list and retained as a completion record.

Review earlier work

The work-order view offers **My maintenance history on this asset**. Expand it for your earlier completed jobs and notes. Scanning an asset offers the broader permitted reference view of its recent completed and open work.

Restore a temporary draft

Where browser storage is available, unsaved execution fields may remain in the current tab. When you return, an available-draft message offers **Restore draft** or **Discard draft**. Review restored entries against the current job before saving.

A draft is not saved work

A temporary browser draft is not a permanently saved maintenance record. Select **Save progress** or **Complete work order** to commit entries. Unsaved changes may be lost when switching devices, signing out or closing the browser; signing out clears temporary drafts.

Work with a live connection

Before leaving the work order, verify a successful save or completion confirmation and check the recorded entries. If saving fails, keep the record open, restore connectivity and retry as appropriate. A visible local entry is not proof that the server accepted it.

When another person changes the job

An assignment or record change can make your saved view out of date. Read the message, reload the latest record and check ownership before retrying. Your authority to execute work follows its current assignment and lifecycle.

TECHNICIAN WORKSPACE

Create work and consult equipment

Mobile / Use New work order for a new CM/BM task and Scan asset for equipment context.

Create manual work from My Work

Select **New work order**. Choose an asset, enter Work description and select CM or BM. The category is Repair. Choose Priority; Regulatory is enforced where required by the asset.

Add a practical plan

Enter Due date, estimated duration/cost, instructions and a reference document link. Technicians create work only for themselves; supervisors and administrators can choose the assigned user and Scheduled date. Review the team. PM jobs must come from PM schedules.

Save and follow its assignment

Select **Save work order**. Its permanent number is assigned on save. Technicians can open their new job from My Work. A supervisor or administrator handles reassignment; jobs assigned to someone else leave your personal open list. Ask a manager to add the asset first if none is available.

Scan or enter the asset number

From Home choose **Scan asset**, then Start camera and allow permission. A phone's normal camera can also open a tag. If scanning is unavailable, enter the complete asset number. Live links require sign-in and organisation access.

Use the asset reference view

The scanned record shows equipment identity and location, its three most recent completed work orders and all currently open work, with status and assignment. Other people's jobs are for reference; eligible unassigned work can be claimed.

Find the right instructions

Instructions in bottom navigation contains the application user guide. Maintenance-specific work plans and reference links belong to the relevant job.

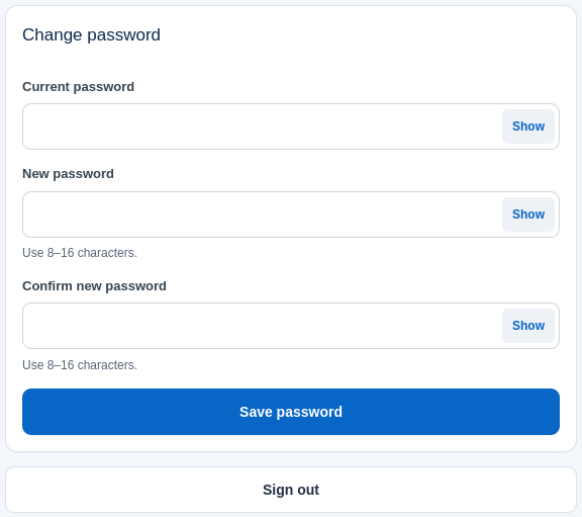
Before creating a duplicate

Check the asset's existing open jobs and read their descriptions. If you find an eligible unassigned job for the same task, claim it through the available workflow instead of creating another record for the same work.

ACCOUNT AND ACCESS

Manage access from either view

Web / My account in the left menu. Mobile / Account in bottom navigation.



Password controls in mobile Account.

Change your own password

Enter Current password, New password and Confirm new password. Use Show/Hide to check the entries. Select **Save password** and check the success confirmation. Use 8–16 characters; the form explains when an entry is too short or too long.

Use the appropriate workspace

Recognised mobile devices open the Technician Workspace automatically. Use the web interface on a desktop. Both views keep the same account and role permissions.

Sign out deliberately

Save work first, then use **Sign out**. This clears temporary mobile drafts. On shared equipment, confirm that the application has returned to its sign-in state.

Install a home-screen shortcut

On a supported phone browser choose **Install** or **Add to Home Screen**. This opens the same web-based Technician Workspace; it does not add offline synchronisation or require a separate native application.

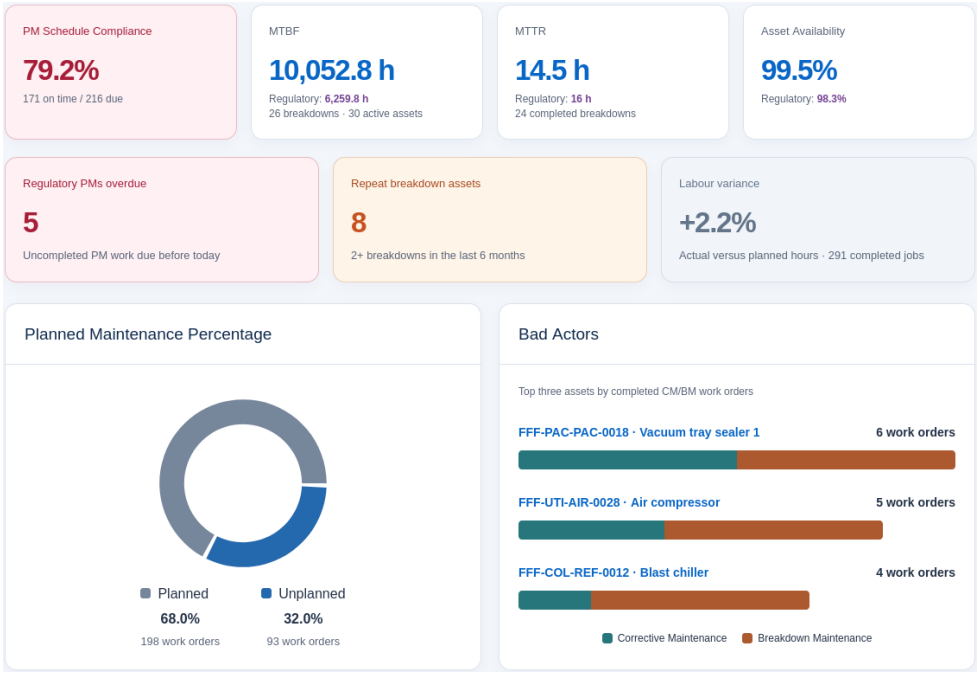
If you cannot sign in

Check the email and password. Five incorrect passwords lock sign-in for 10 minutes. A second lock within 24 hours requires a tenant administrator password reset. Warnings explain the lock. Locked tenant administrators contact a platform administrator. Temporary passwords must be changed at next sign-in. Keep passwords out of support requests.

RELIABILITY

Learn from completed work

Administrator or supervisor / Open Reliability below Dashboard. The page reviews a rolling 12 months, separate from the forward-looking dashboard.



Franks Fine Foods example. Cards show maintenance measures; Bad Actors counts completed CM/BM jobs in the rolling period.

Check the period and scope

Read the date range above the cards. This is a rolling calendar year through the current snapshot. Review the selected reporting period before interpreting the figures.

Read PM compliance

PM Schedule Compliance is the share of generated PM work due in the period completed on or before its original target day. Open overdue PM work counts as missed. Compliance and Availability cards turn amber below 95% and red below 90%. Cancelled work and ungenerated forecasts are excluded; changing a plan is not a way to erase a missed original target.

Compare planned and unplanned work

Planned Maintenance Percentage uses completed work in the period: linked to a PM schedule means planned; manually created work means unplanned. Scheduling a manual CM/BM job does not make it PM-generated for this chart.

Use Bad Actors as an investigation list

The chart ranks the top three assets by completed CM and BM work-order count. Each bar separates corrective and breakdown jobs. PM and cancelled work are excluded; equal totals sort by asset number. Select an asset to review its history before changing a maintenance strategy.

RELIABILITY

Read the measures in context

Open How these figures are calculated at the bottom of Reliability before interpreting a rate or comparing fleets.

MTBF: a calendar estimate

Mean time between failures uses observed calendar hours minus breakdown downtime, divided by breakdowns created in the period. It does not use measured machine operating hours. No breakdown starts produces a dash rather than an infinite rate.

MTTR: elapsed time, including waiting

Mean time to repair averages breakdown creation-to-completion time for breakdowns completed in the period. Waiting for parts or access is included. It does not measure hands-on labour; record that separately as Actual labour hours.

Availability: the recorded breakdown picture

Availability compares calendar exposure less breakdown downtime with calendar exposure. Overlapping breakdowns count once per asset; an open breakdown runs to the snapshot. Unrecorded stoppages are absent, so a high result does not prove equipment never stopped.

Understand fleet and regulatory scope

MTBF, MTTR and availability use the current active fleet. Exposure starts at installation or the earliest known asset/work record, capped to the period. Historical disposal dates and operating hours are unavailable. Regulatory comparisons use each asset's current regulatory flag.

Regulatory PMs overdue

This count identifies uncompleted regulatory PM work due before today. Use the work-order list to locate and prioritise those jobs. A job due today is not overdue.

Repeat breakdown assets

This counts active assets with two or more breakdown starts in the last six calendar months. Review the recorded fault descriptions, completion findings and PM plan to decide whether further investigation is needed.

Labour variance

Completed jobs need both actual hours and a positive planned duration. Variance compares the total actual hours with the total planned hours for that matched set. Positive means above plan; negative means below. Missing values are excluded and a dash means a rate cannot be calculated.

Check the data behind each measure

Bad Actors uses job counts, not cost estimates. Keep work types, installation dates, breakdown creation/completion, PM targets and actual hours accurate. Missing labour values are excluded from labour variance. Never insert artificial records to improve a measure.

Turn learning into the next plan

Review repeat failures and assets with frequent CM/BM jobs with the team. Adjust a PM or work plan only after inspecting the underlying history. Save the operational change through its normal workflow, then monitor later completed work; the report itself does not edit maintenance records.

QUICK REFERENCE

Keep the maintenance cycle moving

A short routine for the team, followed by the terms used throughout the guide.

Start the shift

Review overdue, due and unassigned work. Check Further work review and unassigned regulatory work where your role provides them. Confirm assignments, available capacity and procedure links before beginning.

Plan and communicate

Review durations and the working calendar. Adjust the timeline, review overlaps and select Save changes. Confirm that a technician is assigned where individual ownership is needed. Share deliberate exceptions with the team.

During the job

Read the work plan, select Start work, record findings and actual labour, and save progress. Flag additional maintenance with a useful explanation. Keep equipment records and meter readings accurate.

Finish and follow through

Complete the job with notes and any required reading. Review reported further work and plan the linked corrective job. Check upcoming PM requirements and the next shift's work. Periodically review Reliability to identify recurring problems and improve plans.

Ask for help with useful context

For access or configuration, contact your organisation administrator. For Micro CMMS enquiries, use info@microcmms.com.
Include: application area and web/mobile view; problem description; expected and actual behaviour; steps to reproduce; relevant asset or WO number; device, operating system and browser/version. Add the exact error and a screenshot where useful. Remove passwords and sensitive information from the report.

Asset, PM, FC and WO

An **asset** is the equipment record. A **PM schedule** defines a recurring requirement. An **FC occurrence** represents predicted work; its display label is temporary, while internal history is retained. A **WO** is the maintenance job that can be assigned and completed.

CM, BM and PM

CM is corrective work for an identified defect. **BM** responds to equipment failure. **PM** comes from a preventive schedule or forecast. Manual CM/BM uses Repair; PM retains its source linkage.

Due, scheduled and generated

Due is the required completion date. **Scheduled** is the planned time to do the work. **Generation date** applies a PM lead time to its forecast date. These serve different purposes and should be reviewed separately.

Estimate, labour and draft

Estimated duration/cost supports planning. **Actual labour** is time worked, entered in hours. A **draft** is temporary browser data; saved progress is committed to Micro CMMS.

Return to a chapter

Use the clickable contents or PDF bookmarks to revisit Setup, Assets, PM, Work Orders, Scheduling, Further work review, Dashboard, Exports, QR labels, Mobile, Account or Reliability. Open login.microcmms.com to access your organisation.

TROUBLESHOOTING

Resolve common problems

Use the record number and the current message to investigate. Start with visibility, ownership and whether a change was saved.

An asset or PM is missing

Select the relevant Status; the list updates automatically. Active is the default. Clear filters resets visibility; it does not change the record. Check search text and wide table columns before assuming the data is missing.

A job is absent from My Work

Check its Assigned user and lifecycle. A team assignment alone is insufficient. Completed, cancelled or reassigned jobs leave your personal open list. Use the full exact WO number only when looking for eligible unassigned work.

A PM meter is unavailable

Configure the meter on the selected asset. If the choice itself is missing, ask an administrator to add or activate it in Setup > Meters. Return to the open PM and select Refresh meters after using Configure in Asset.

A meter value or prediction looks wrong

Check meter, unit, date and current value. Use the asset's **Save correction** control for a legitimate adjustment and record its reason. Predictions then need two actual completion readings; correction entries are not usage.

A QR label fails to scan

Check internet access, camera permission and authorised sign-in. Try the phone camera or enter the full asset number. Inspect label clarity and damage. Reprint with the correct dimensions and a clear area around the code.

Moving work did not clear overdue status

Scheduled start and Scheduled date are planning choices. Overdue status follows Due date. Review the required completion date separately from the proposed time to do the work.

A schedule or bulk batch was stopped

Another person may have changed a record, or a closed/meter-driven job may block the requested batch. The rejected batch saves nothing. Read the affected numbers, reload and refine the set before retrying.

Forecast dates or chart totals look wrong

Check active PMs/assets, completion-reading history, the forecast horizon and due dates. Spend excludes missing estimates. Currency changes presentation only; it does not convert amounts or remove existing values. Generated FCs are counted through their work orders; completed/cancelled work is excluded.

Mobile notes were not saved

Check the Save progress confirmation and recorded entries. A restored draft or dismissed keyboard does not save work. Follow the connection, recovery and saving guidance on page 29 before leaving the record.

Labels do not line up

Confirm stock, gaps and margins. Use fresh stock; bulk PDFs start at position 1. Test on plain paper, print at Actual size / 100%, and disable headers/footers. Do not use Fit to page to compensate for the wrong stock settings.