

# Tips and Best Practices

Here are some words of experience on the best way to add and use data in Sytewise.

- Naming Fixtures and Parts
- Grouping Fixtures
- Adding Properties
- Descriptions can save you Time and Money

# Naming Fixtures and Parts

## Thoughts on How to Name your Fixtures

Here are some thoughts about how to name your Fixtures and why a Naming Convention is a good idea.

## What's in a Name?

**Which HVAC Unit needs a new compressor?** Maintenance Systems need to keep track of hundreds of Fixtures and their parts, some of which are identical except for their serial number and location. To make sure your staff can easily find and repair the right equipment, build that information into the name of your fixture.

## Naming your Fixtures

The type of fixtures you manage or maintain and the way that you work with them can make a difference on how you choose to name them. Facility Maintenance organizations that work with static location items may choose to include a Property Name or Location in the Fixture Name. Companies that maintain equipment that is mobile may default to a Service Tag or Item Number. Each Company's naming strategy will be different and the same company may use a different strategy for different fixture types. Here are some features you may want to include:

- **Fixture Type Data:** HVAC, Hot Water Heater, Lighting Fixtures,
- **Manufacturer Data:** Make, Model, Serial Number
- **Location Data:** Address, Tenant Suite, Property, Ownership
- **Instance Data:** Pole 6, RTU4, Fire Panel 3, etc..

## Describing your Fixtures

Fixture descriptions can offer a lot of detail to the viewer and even short descriptions can be very helpful. A minimum of details would include the type of fixture and any thing that would help identify it such as its age, capacity or function.

An HVAC unit may be described as “ 2010 RTU6, 25 Ton, Gas Pack, 3Phase “

## Naming fixtures doesn't need to be Hard

The goal of naming your fixtures is to make them easy to find and identify for your employees, vendors, and inspectors. If you are consistent, even a simple naming convention will add lots of value to your work management system. Here are some ideas to guide you as you come up with a naming structure.

- **Straight forward:** Maintenance technicians should be able to draw meaning from asset names. Don't name a HVAC Unit as “NUMBER 6.” HVAC,RTU, or COND is simpler and is more valuable to your employee. JCPENNEY RTU 6 is easily understood.
- **Consistent:** Keeping your naming convention consistent will improve the data your system can provide you. Make sure to be consistent in length and case. Add leading zeros to your numbers if you think a Fixture type may have more than 10, 100, or 1000. If you have 100 fixtures of the same type, the first fixture should include the numbers 001.
- **Unique:** Each asset name should be unique to prevent confusion.
- **Short as Possible:** Don't include information easily found elsewhere
- **Allow for Expansion:** Make sure you leave room for the addition of new fixtures of the same type. Names that include numbers should allow for
- **Numbers over Letters:** Letters can be much easier to interpret for employees and include information that numbers alone just can't.

# Grouping Fixtures

Grouping Fixtures is a powerful tool to allow you to look at subsets of fixtures on a property quickly and easily. Looking at lights and want to see just your Pole Lights? Make a group. Looking at HVAC units and want to see just the HVAC units on top of the Walgreens? Make a group. Groups help categorize and locate your fixtures quickly and efficiently. Also, Groups that are created by the administrator are available to Vendors and Surveyors to locate specific fixtures on the Work Order Map.

## What are the best ways to Group Fixtures?

- Fixture Type
- Fixture Location
- Fixture Ownership
- Fixture Maintenance Vendor
- Height off Ground

### Fixture Type

Grouping all fixtures by type is a great way to keep track of how many of a specific item you have on a property. Pole Lights, HVAC units by type and tonnage, even landscaping material can be grouped by species if it helps your technicians plan for maintenance. It also can make it easy for technicians to survey a specific type of item.

### Fixture Location

Fixture Location is a great way to look at a small group of fixtures when you have a large number at a single property. Say you have four to five hundred light fixtures on a property. Looking at a list of all of them to find your pole lights would be daunting. Group all of your Pole lights together and you can easily display just those fixtures and find your specific fixture quickly. Fixture Location is a great way to name your groups also. Show me all the HVAC units on top of the Kroger Grocery Store. That list shortened from 75 in the whole center to the 8 units that are on the Kroger roof.

## Fixture Ownership

Fixture Ownership is a great way to group fixtures if you happen to have more than one ownership entity for a property location and the division of maintenance is based on parcels or areas of the property. If a property is divided into Phases and each phases has different ownership or maintenance entities, this is a great way to group fixtures and easily export those that belong to or maintained by one group over the other.

## Fixture Maintenance Vendor

Not all Fixtures of a certain type are maintained by the same vendor. Grouping Fixtures by the Maintenance Contractor that services them makes it easy to keep track of the units associated with the vendor in question.

## Fixtures By Height

The height of Fixtures is baked into how Fixtures are entered into our system. It is a great way to know what type of vendor you should send to maintain a specific Fixtures, and what type of equipment they will need to reach it if it is a good distance off the ground.

## Any other Category that Makes sense to You

There are any number of ways of categorizing Fixtures that will make sense to you with your Fixtures on your Properties. If you ever need to see a Group of Fixtures as a subset of the whole, then save it as a Group. Any individual Fixture can be a part of several groups. Making Groups is simple and they are easy to recall when you need them.

## How To Group Fixtures

Grouping fixtures is an easy. Use the following steps to create a Group:

- Select the Fixture or Fixtures you want to Group using the Square Check Box to the right of the Fixture Name.

Fixtures

4/4

+ Fixture

+ Group

Clone

RTU2

✓

1/1

[17ft+] CARRIER PKG UNIT 4518P29361

[admin] Tue Feb 16, 2021 06:08:04 PM

RTU3

✓

1/1

[17ft+] CARRIER PKG UNIT 4518P29362

[admin] Tue Feb 16, 2021 06:08:04 PM

- Click the +Group button at the top of the Fixture List.

Create A New Fixture Group

New Group Name

Enter A Group Title

Letters and numbers only.

Create New Group

Cancel

Fixtures

+ Fixture

+ Group

Clone

RTU2

[17ft+] CARRIER PKG UNIT 4518P29361

[admin] Tue Feb 16, 2021 06:08:04 PM

RTU3

[17ft+] CARRIER PKG UNIT 4518P29362

[admin] Tue Feb 16, 2021 06:08:04 PM

- Enter the Name your new Group and click on the Create New Group button

Your new Group is done and already includes any fixtures you selected when making the Group.

Create A New Fixture Group

You only need to select one fixture to create a Group. You can add any other Fixtures you create to existing Groups.

If you **Clone** a **Fixture** that is part of a **Group**, The Clone will also be added to the same group, automatically. It is good practice if you are creating a Fixture that you are going to Clone and add to a Group, go ahead and use your first Fixture to Create the Group. Any Clones will already be a part of the group automatically.

# Adding Properties

Adding properties is a pretty simple and straight forward process. Here's a couple of things to think about to make your life easier as you work on the property in the future.



# Descriptions can save you Time and Money

Searching for a specific type of fixture across your portfolio used to take a lot of time and guesswork. Sytewise can help you recall these fixtures in minutes without the guesswork. The descriptions you give your fixtures will be a large part of sifting through all of your fixtures to get to the gold nuggets at the end of the rainbow.