

FSI (FM Solutions) Limited

Concept™ Foundation Skills

Introduction

Concept™ Foundation training covers core aspects of setting up and using your Concept™ SQL Lite, SQL or 500 system.

Target Audience

This three-day Foundation Skills course is recommended for all system users, especially those involved in the set-up and configuration of the core system.

The course focuses on the creation and control of your Asset Register; associated planned preventative maintenance (PPM) tasks and reactive tasks logged via the helpdesk.

Users will gain a full understanding of the core system's capabilities and its utilisation.

Course Content

Base System Considerations

- An introduction to Concept™
- Navigation and Support
- System Security
- Monitoring Expenditure - Cost Centres
- Adding Suppliers
- Departmental Management
- Defining your Buildings and Locations
- Resource records
- Shifts and Rotas – using L.O.P.S. (Labour Operational Planning System)
- Setting up the Contact Manager
- Defining Work Categories and Instructions
- Call Logging considerations
- Creating and configuring your Contracts
- System Defaults

Creating and Managing PPM Tasks

- The Asset Register – Creating assets
- Associated Maintenance - PPM task creation
- Filtering Assets using the Table View of Assets

- Managing the PPM Planner
- Activating your PPM's - issuing the tasks
- Viewing Historic PPM Task Issues
- Task Control
 - User Preferences
 - Task Preferences
 - Assigning a Resource
 - Completing Task Records
 - Sending a completed task to history

Creating and Managing Reactive Tasks

- Logging and/or authorising a task
- Assigning resource
- Events and Levels of Completion
- Completing task time and cost records
- Processing tasks to history
- Setting user preferences
- Copying calls and duplicate call checking
- Customer satisfaction

Task Management

- Timesheet management
- Viewing historic tasks
- An overview of the standard system reports
- Crystal Connect
- The Asset Tree
- Document Manager
- Fast Task Sign Off
- SQL Empowerment
- Searching for tasks using the Task Navigator

Relevant queries to be answered throughout the course.

Certification

Upon completion of the course, a certificate will be issued to all candidates who have demonstrated a satisfactory level of competence.