# Centerstone User Documentation

Last Updated: 10/1/2015 3:04 PM

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Centerstone Terminology

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<td>Different Copies of the space data. You always want to choose “As Built”</td>
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<td>Space data, including Buildings, floors and rooms</td>
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<tr>
<td>*** Work Order Name</td>
<td>The 3 asterisks mean that the work order location has asbestos.</td>
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Launching the Centerstone Applications

Full web version of Centerstone

- First open an Internet Explorer Window
- The URL is: https://sso.ecenterone.com/RIT/
- You will need to log in with your MAIN credentials (same as email)

Mobile work order version of Centerstone

- First open Chrome or Safari.
- The URL is: https://sso.ecenterone.com/RIT/MobileWO
- You will need to log in with your MAIN credentials (same as email)

Mobile SpaceWalker Read Only Version

- First open Chrome or Safari.
- The URL is: https://sso.ecenterone.com/RIT/SpaceWalker_ReadOnly
- You will need to log in with your MAIN credentials (same as email)

Settings for Internet Explorer with the Full Centerstone Applications

Add Manhattan to your Compatibility List

- First open an Internet Explorer Window
- Click on the Wheel in the upper right corner (Tools)
- Click on Compatibility View Settings
- In the “Add this website:” box, type manhattan-online.com
- Click Add
- Click Close

Setting up Favorites or Shortcuts to Centerstone Applications

Add Full version to Favorites for Internet Explorer

- First open an Internet Explorer Window
- Copy this URL into the address bar: https://sso.ecenterone.com/RIT/
- Hit Enter
- Click on the Favorites Star in the Upper Right hand corner of the Internet Explorer Window
- Click the “Add to Favorites” button
- Change the “Name” to Centerstone
- Change the “Create in” to your desired location.
- Click Add
- Click on the Favorites Star in the Upper Right hand corner of the Internet Explorer Window
- Find the Favorite you just added. It should be called Centerstone in the folder you chose.
- Right-click on the Centerstone Favorite.
- Select “Properties”
• Click on the “Web Document” tab.
• Delete the URL.
• Copy this URL into the URL box: https://sso.ecenterone.com/RIT/
• Click OK
• Your Favorite is now ready to use.
Add Mobile Work Order version to Bookmarks for Chrome

- First open a Chrome Browser
- Copy this URL into the address bar: https://sso.ecenterone.com/RIT/MobileWO
- Hit Enter
- Click the Star in the far right of the Address Bar (Bookmark this Page).
- Set the “Name” to Centerstone Mobile WO.
- Set the “Folder” to your desired location.
- Click “Done”
- Click “Other bookmarks” and find your new bookmark.
- Right-click on the Centerstone Mobile WO bookmark.
- Select “Edit”
- Delete the URL.
- Copy this URL into the URL box: https://sso.ecenterone.com/RIT/MobileWO
- Click Save
- Your Bookmark is now ready to use.

Add Mobile Work Order version to Bookmarks for Safari on an iPod

- Ideally you would open an email with the link in it. https://sso.ecenterone.com/RIT/MobileWO
- Touch and hold on the link until you get the option to “Copy” the link.
- Touch “Copy”
- Then touch the link to open the page in a Safari browser
- Touch the box with the up arrow to bring up the Share Menu.
- Touch “Add Bookmark”.
- Set the “Name” to Centerstone Mobile WO.
- Set the “Location” to your desired location.
- Touch “Save”
- Touch the Open Book Icon and find your new bookmark.
- Touch “Edit”
- Touch Centerstone Mobile WO.
- Delete the URL.
- Touch in the Address window until the “Paste” option pops up and then touch “Paste”.
- If the “Paste” option does not pop up, you can just type in: https://sso.ecenterone.com/RIT/MobileWO
- Click Done, Click Done
- Your Bookmark is now ready to use.
Managing Work Orders

Adding a Work Order

- OPS MGT > Work Orders
- Click the **ADD Work Order** button.
- Click **No** to the question “Should the new Work Order be created from a Work Order Template?”
- On the Attributes tab:
  - Enter a “Work Order Name” (example Light Out, B43, Rm 1234)
  - Select a Work Order Category (Do not choose Maintain for repair work orders)
  - Select a Job Type. (Do not choose Maintain for repair work orders)
  - Select a Requested For
    - Enter the Last Name.
    - Click the **Search** button.
    - Select the person.
    - Click the **Select** button.
  - Enter the problem in the “Description box”
- Select the STRUCT UNITS Tab
  - Click **Yes** to the question “Save Changes?”
  - Click the **Assign** button.
  - Select “Spaces” from the “Search by:” drop down.
  - Select the “Bldg. Name”
  - Click the **Search** button.
  - Select the correct room.
  - Click the **Assign** button.
- Click the **Close** button.

Finding a Work Order

- OPS MGT > Work Orders
- Select the appropriate “Load Search” option.
  - Default Work Order Search will show all work orders.
  - Active Non-PMs will show work orders that are not PM generated and are not closed or cancelled.
  - Active PMs will show just work orders that are PM generated and are not closed or cancelled.
  - All Active WO will show work orders that are not closed or cancelled.
- Enter Search Filters.
  - For example, you may want to enter your name in the Assigned To drop down.
- Click the **Search** button.
- You can now see a list of Work Orders based on your Load Search and Search Filters.

*If you know the work order number (example wo-12894)
OPS MGT>Work Orders
Select Load Search Option: “Active Responsive Work Orders”

Search Filters
Enter work order in Number field (must be put in wo-xxxxx) Enter wo-xxxxx
Enter in Status is not (make field blank by selecting the top box of drop down)
Enter in Status is not (make field blank by selecting the top box of drop down)
Enter in Category is not Choose Maintain from drop down
Enter in Category is not Choose FMS Admin from drop down
Click Search*
You will see the work order in blue highlight. If you need more details than what is on the screen, you can double click on the work order and the screen will show the different tabs that can be read.

**Editing a Work Order**
- Find the Work Order you want to edit.
- Double click on the WO.
- Update the information and add additional comments (Attributes Tab) to tell what you did to complete the work order.
- To update hours, select the Labor Tab (Click Yes to Save Changes?)
  - Double click on the record to add Labor to.
  - Enter hours on the right under Actual Costs.
  - Do not enter labor notes in this section; they belong on the Attributes tab under comments.
  - Click the Save button.
- Click the Close button.

**Assigning a Work Order to a FMS Student**
- Find the Work Order you want to assign to a student.
- Double click on the WO.
- Set the “Assigned To” to Student, (Maint, Electrical, Engineering, Custodial, or Grounds).
- Click the Save button.
- Click Yes to the question, “Would you like to copy the Assigned-to as a Labor Provider?”
- Remember that the Work Order will not show up in the Mobile WO application for a student.

**Assigning a Work Order to Housing Operations**
- Find the Work Order you want to assign to Housing and double click on the WO.
- Set the “Status” to Cancelled.
- Set the “Assigned To” to RIT Housing Operations.
- Choose “Service Center” drop down: Housing Ops.
- Click the Save button.
- This will send an email to Housing Operations.

**Assigning a Work Order to a Vendor**
- Find the Work Order you want to assign to a Vendor and double click on the WO.
- Make sure the Struct Units (location) has been filled in.
- Make sure the Assets (equipment) has been filled in.
- Set the “Status” to Assigned to Vendor.
- Set the “Assigned To” to the Vendor of your choice.
- Click the Save button.
- An email will go to the vendor with the Work Order information.

**Adding Hours for a Labor Provider not Assigned to the Work Order (Including Students)**
- Find the Work Order you want and double click on the WO.
- Select the Labor Tab
  - If you do not see the person you want to add hours for, click the New button.
  - At the bottom of the page, click the Assign button.
  - Set the “Search by” to Human Resources.
  - Enter in the desired “Last Name” (type in “Student” to record student labor).
  - Click the Search button.
Completing a Work Order

- Find the Work Order you want to close and double click on the WO.
- On the Attributes tab:
  - Set the “Work Order Status” to Completed
  - Enter what you did to complete the repair in “comment box”
  - Set the “Completion Date” in the Dates Section
- Select the Labor Tab (Click Yes to Save Changes?)
  - Double click on the record to add Labor to
  - Enter “Regular hours” on the right under Actual Costs
  - Do not add labor notes to this tab (they belong on the “Attributes tab”
  - Click the Save button
- Click the Close button
Managing Work Orders in the Mobile Version

Adding a Work Order
- Launch the Mobile App
- Click the Icon in the upper right corner that looks like a box with a pencil.
- Set the Requested For if it is for someone other than you.
- Enter the Building, Floor and Space
- Set the Status to Issued
- Set the Category and the Type
- Enter a WO Title in the Subject
- Enter the Description
- Click the Save button in the upper right corner
- Note that the WO will be auto-assigned to you.

Viewing a Work Order
- Launch the Mobile App.
- Touch the WO you want.
- The details page will open. Scroll up and down to see information.
- Touch the Detail button in the upper left corner.
- Then choose between Detail, Assets, Labor Providers, Time, Parts, and Comments.
- Touch the House icon in the upper right to return to the Work Order list.

Assigning a Work Order
- Launch the Mobile App.
- Touch the WO you want.
- Touch the Detail button in the upper left corner.
- Then choose Labor Providers.
- Touch the Square with a Pencil icon in the upper right corner.
- Touch Select Provider.
- Type some of their name into the Search box. Hit enter or return.
- Touch the name you want to assign the Work Order to.
- Touch the Done button.
- Touch the House icon in the upper right to return to the Work Order list.

Add Parts to a Work Order
- Launch the Mobile App.
- Touch the WO you want.
- Touch the Detail button in the upper left corner.
- Then choose Parts.
- Touch the Square with a Pencil icon in the upper right corner.
- Touch Select Parts.
- Type some of the name into the Search box. Hit enter or return.
- Touch the part you want to add.
- Enter the Quantity.
- Touch the Done button.
- Touch the House icon in the upper right to return to the Work Order list.
Add Comments to a Work Order

• Launch the Mobile App.
• Touch the WO you want.
• Touch the Detail button in the upper left corner.
• Then choose Comments.
• Touch the Square with a Pencil icon in the upper right corner.
• Enter your comments.
• Touch the Done button.
• Touch the House icon in the upper right to return to the Work Order list.

Adding Time to a Work Order

• Launch the Mobile App.
• Touch the WO you want.
• Touch the Detail button in the upper left corner.
• Then choose Time.
• Enter Hours.
• Touch the Save button.
• Touch the House icon in the upper right to return to the Work Order list.

Completing a Work Order

• Launch the Mobile App.
• Touch the WO you want.
• Touch the Detail button in the upper left corner.
• Then choose Time.
• Enter the Completion Date.
• Enter the Completion Time.
• Enter Hours.
• Touch the Complete button in the upper right corner.
• Touch Yes for Are you sure you want to complete the Work Order?
• You will be returned to the Work Order list screen.
Managing Assets

Searching Assets
- Assets > Physical > Search
- Double click (or click once and select Information from the top left) to open up details
- Note the tabs along the top for Attributes, Picture, and Human Resources etc.

Creating Assets
- Assets > Physical >
- Click the ADD Physical Asset button.
  - Attributes tab opens. The following three fields are required:
    - Category
    - Class
    - Definition – For most items, this is the same as the class
  - Leave the Name and Equipment ID blank. They are auto-filled.
  - Set “Status” to Active
  - Enter any other relevant data
  - Select the Struct Units tab across the top to add a location
    - Click the Assign button
    - Now you will search for the Location. If there is a specific room, select Space in the Search by: dropdown in the top left. Otherwise, for an entire building search by Buildings etc. Once you have your filter criteria set, select Search in the top right
    - If you need to sort the results, select the column heading and click once
    - Once you found the Room, select and click the Assign button.
  - Click the Save and Close buttons.
  - Refresh your list and find the new Asset
  - Double click the Asset to edit it.
  - Enter the correct “Index Number” in the UDA section
  - Enter the FMS department number in the Maintenance Group UDA.
  - Enter in any other desired UDA’s.
  - Click the Save button.
Managing Preventative Maintenance Programs

Finding a Maintenance Program

- OPS MGT > Maint Programs
- The Maintenance Programs Window will open
- Click on Advanced Search
  - You can enter a PM Name
  - You can Select the Shop assigned to the PM
  - Click the Search button
- You can click on the header names to change the order of the grid
- You can scroll up and down through the list with the scroll bar on the right.
- You can go to the next page of Maintenance Programs by hitting the right arrow.

Turning Columns on/off for the Maintenance Program grid

- OPS MGT > Maint Programs
- The Maintenance Programs Window will open
- Click on the down arrow to the right of a column header.

- Select Columns
- Uncheck the columns that you want to turn off.
Viewing/Editing a Maintenance Program

- OPS MGT > Maint Programs
- The Maintenance Programs Window will open
- Find the Maintenance Program you want to edit
- Double click on the MP or click on the MP and click the **Edit** button
- On the Attributes tab, you can update the:
  - Program Name – The procedure name, plus the equipment id, plus the scheduled date
  - Procedure Mode – Always choose “Detailed Group”
  - Category – Always choose “Maintain”
  - Service Center – Set to the Maintenance Group
- On the Scheduling tab, you can update the:
  - Starting Date
  - End Date
  - Frequency
  - Pre-Assignment Shop, Supervisor, Labor
- On the Procedure Groups tab, you can select the Procedure
- On the Assets tab, you can see the equipment assigned to the MP
- On the Work Orders tab, you can see the Work Order generated by that MP
- On the Materials tab, you can see the parts required for the MP
- On the Documents tab, you can see related docs for the MP
Adding a Maintenance Program

1. OPS MGT > Maint Programs
2. The Maintenance Programs Window will open
3. You may want to set the advanced search so you see related PMs. Ex: HC AHU FULL-HC-001
4. Click the **Add** button
5. On the Attributes tab, you can enter the:
   a. Program Name – The procedure name, plus the equipment id, plus the scheduled month
      Ex. HC AHU FULL-HC-001-AHU-02-Jul
   b. Program Type- select “Scheduled”
   c. Procedure Mode – Always choose “Detailed Group”
   d. Category – Always choose “Maintain”
   e. Service Center – Set to the Maintenance Group Ex. 18201PM
6. On the Scheduling tab, you can enter the:
   a. Starting Date – The start date is not the date of the first WO. No WO will generate before the start date.
      **Make sure the Start Date is prior to the Next Scheduled Date**
   b. End Date – Generally you will select “No End Date”
   c. Frequency
      i. Then set the Every ... Ex. Every July 1.
      ii. Or the first Monday of ...  
      iii. Or Issue new WO X years after completed
   d. Pre-Assignment Shop, Supervisor, Labor
7. On the Assets tab click on the **Add** button
   a. Select the Category
   b. Select the Class
   c. Enter the building into the Location box. Ex. 001 or 099
   d. Click the **Search** button.
   e. Select the equipment you want and click the **Select** button
8. On the Procedure Groups tab click the **Add** button
   a. Find the Procedure you want and click it
   b. Click the **Select** button
   c. If you want to add parts continue to 8d, otherwise skip to step 9.
   d. Click on the Procedure Group you just added and click the **Edit** button
   e. The Procedure Group window will open with a list of Procedures. Most Procedure Groups only have one procedure. Click on the procedure and click the **Edit** button.
   f. The Procedure window will open. Click on the Materials tab
   g. Remove any parts that do not belong by selecting the part and hitting the **Remove** button.
   h. Click the **Add** button
      i. Find the part you want to add. Searching with “Contains” may help
      ii. Click the **Select** button
   i. Repeat 8h for any other parts you want to add.
   j. Click both **Save** buttons
9. On the Documents tab, you can add related docs for the MP
10. The Materials tab shows the parts you added
11. Click the **Close** button
Deleting a Maintenance Program

- OPS MGT > Maint Programs
- The Maintenance Programs Window will open
- Find the Maintenance Program you want to delete
- Click the **Remove** button

Viewing/Editing a Procedure

- OPS MGT > Maint Programs
- The Maintenance Programs Window will open
- Select the “Procedures” tab
- Use Advanced Search to find the Procedure
- Double click on the Procedure or click on it and then click the **Edit** button
- This will open the Procedures window
- The Attributes tab contains the:
  - Name – The Equipment Category, plus the equipment type plus the frequency Ex. HC AHU A
  - Instruction – Summary of the Procedure
  - Estimated Hours
- The Inspection Points tab allows you to:
  - Add Inspection points
  - Remove Inspection points
  - Change the order of the inspection points
- The Materials tab stores the parts needed for every PM assigned to this Procedure. Any parts listed here must be generic

Viewing/Editing an Inspection Point

- OPS MGT > Maint Programs
- The Maintenance Programs Window will open
- Select the “Inspection Points” tab
- Use Advanced Search to find the Inspection Point
- Double click on the IP or click on it and then click the **Edit** button
- This will open the Inspection Points window
- Enter the name
- Select the Type
- Enter the Instructions
Managing Asbestos

Check for Asbestos in a Room

Struct Units > Spaces

Enter the desired Bldg Name and any other search criteria.

Click the Search button

Click on the desired room and click Information.

In the User Defined Attributes section, click on the Edit Series Data button next to Asbestos Materials.

When you are done, click the Close button.
Adding Asbestos to a Room
1. Follow the directions for Check for Asbestos in a Room to get to the Asbestos window for the desired room.
2. Select the Key Date.
3. Select the Material from the list of material types.
4. Enter the “Quantity”.
5. You can define the specific location of the asbestos in the Location box.
6. You can add any other information into the Notes box.
7. Click the Save button.
8. Return to step 2 to add more asbestos to the same room.
9. Click the Close button when you are done.
10. Add the change to the asbestos transaction log.
    a. In the User Defined Attributes section, click the Edit Series Data button next to Asbestos Transactions.
    b. Enter today’s date in the Date box.
    c. Select the Material from the list of Material Types.
    d. Enter zero in the old quantity.
    e. Enter the quantity in the New Quantity.
    f. Click the Save button.
    g. Click the Close button.
11. Make sure the Asbestos Check box is checked.

Editing Asbestos in a Room
1. Follow the directions for Check for Asbestos in a Room to get to the Asbestos window for the desired room.
2. Select the asbestos you need to edit.
3. Click the Edit button.
4. Edit the “Quantity”.
5. You can define the specific location of the asbestos in the Location box.
6. You can add any other information into the Notes box.
7. Click the Save button.
8. Return to step 2 to edit more asbestos in the same room.
9. Click the Close button when you are done.
10. Add the change to the asbestos transaction log.
    a. In the User Defined Attributes section, click the Edit Series Data button next to Asbestos Transactions.
    b. Enter today’s date in the Date box.
    c. Select the Material from the list of Material Types.
    d. Enter the pre-edit quantity in the old quantity.
    e. Enter the new quantity in the New Quantity.
    f. Click the Save button.
    g. Click the Close button.
11. Make sure the Asbestos Check box is checked.
Deleting Asbestos in a Room

1. Follow the directions for Check for Asbestos in a Room to get to the Asbestos window for the desired room.
2. Select the asbestos you need to delete.
3. Click the Delete button.
4. Click Yes to the question “Are you sure you want to delete?”
5. Return to step 2 to delete more asbestos in the same room.
6. Click the Close button when you are done.
7. Add the change to the asbestos transaction log.
   a. In the User Defined Attributes section, click the Edit Series Data button next to Asbestos Transactions.
   b. Enter today’s date in the Date box.
   c. Select the Material from the list of Material Types.
   d. Enter the pre-delete quantity in the old quantity.
   e. Enter zero in the New Quantity.
   f. Click the Save button.
   g. Click the Close button.
8. If you have removed all asbestos from a room, make sure the Asbestos Check box is unchecked.

Managing HR Data

Adding a person as a Labor Provider

- HR
- Enter the persons Last Name
- Click the Search button
- Double Click on the person
- Click on the Labor Tab
- Click Yes to the question “This HR is not currently a Labor Provider. Do you wish to designate as such?”
- Click the Save button.