ZYLERGY

ADMIN GUIDE

Zylergy Facilities

Admin Guide

For administrators, facility managers and portfolio administrators who set up and run Zylergy Facilities

ZYLERGY

Zylergy, Inc.
Lewes, Delaware zylergy.com

ZY-FAC-ADG-01 Rev. A
Release 1.0 · October 2026

Zylergy Facilities Admin Guide
Document number ZY-FAC-ADG-01, Revision A
Release 1.0 · October 2026

© 2026 Zylergy, Inc. All rights reserved.

This document is provided to customers of Zylergy, Inc. and to the people their organization authorizes to use Zylergy Facilities. You may copy it for internal use within your organization, provided this notice is kept on every copy. Any other reproduction, distribution or adaptation requires the prior written permission of Zylergy, Inc.

Agreement governs. Use of Zylergy Facilities and every other Zylergy product and service is governed by your written agreement with Zylergy, Inc. This document describes the product. It does not create a commitment, warranty or service level. If this document and your agreement differ, your agreement governs.

Subject to change. Zylergy, Inc. may revise this document and the products it describes at any time without notice. Features available to you depend on how your organization's administrator has set up your account and on the role assigned to you.

Sample data. Screens in this document show sample data. The people, companies, sites, equipment, order numbers, readings and amounts on them are illustrative and do not describe any customer. Some third-party equipment names on screens are blurred.

Not a substitute for safety procedures or professional judgment. Zylergy Facilities presents information drawn from manufacturer documentation and from your organization's own records. It does not replace the equipment manufacturer's instructions, applicable codes and regulations, your employer's safety procedures, or the judgment of a qualified person. Nothing in this document is engineering, safety or legal advice for a specific situation.

Trademarks. Zylergy, Zylergy Field, Zylergy Solar and Zylergy Facilities are trademarks of Zylergy, Inc. Apple, App Store, iPhone, iPad, iPadOS, Face ID and Safari are trademarks of Apple Inc. Google Chrome is a trademark of Google LLC. Microsoft Edge is a trademark of the Microsoft group of companies. Firefox is a trademark of the Mozilla Foundation. iOS is a trademark or registered trademark of Cisco in the U.S. and other countries and is used under license. Other product and company names mentioned in this document are the property of their respective owners. Their mention does not imply any affiliation with or endorsement by those owners.

Contact. Zylergy, Inc., 16192 Coastal Highway, Lewes, Delaware 19958 · hello@zylergy.com · zylergy.com

Revision history

REVISION	DATE	DESCRIPTION
A	October 2026	First issue for Release 1.0.

About this guide

Who this guide is for

This guide is for the people who set up and run a Zylergy Facilities account. Administrators, usually your organization's IT administrators, hold the **Admin** role. They manage sign-in, users and their access, integrations, data and security, and Zylergy support access. Facility managers set up the content that daily work depends on: sites and buildings, the asset registry and QR tags, manuals, maintenance schedules, compliance obligations and contractors. Portfolio administrators set cross-site policy, including marketplace policy. Compliance officers set up attestations and automated exports. The guide assumes you know your organization's buildings and IT environment. For daily work in the app and the web console, see the *Zylergy Facilities Operator Guide*.

How this guide is organized

- Chapter 1, "Administration overview," describes who does what and gives the setup checklist in the order a new organization works through it.
- Chapter 2, "Account, sites and buildings," covers your organization, sign-in settings, sites, buildings, locations and portfolios.
- Chapter 3, "Users and access," covers roles, inviting people, access to assets per asset, group and contract, contractor access and the audit of access grants.
- Chapter 4, "The Company Brain: asset registry and documents," covers asset records, QR tags and bulk provisioning, nameplate capture, manuals, licensed content and the learning loop.
- Chapter 5, "Schedules and obligations," covers preventive maintenance intervals, cadence learning, compliance obligations and governing authorities, warranties and credentials on file.
- Chapter 6, "Contractors and the marketplace," covers known contractors, service agreements, marketplace policy, qualification, ratings and disputes.
- Chapter 7, "Integrations," covers CMMS overlay and standalone modes, the supported CMMS, two-way synchronization, building systems, parts handoff and integration credentials.

- Chapter 8, “Data, privacy and security,” covers isolation, encryption, access control, the tamper-evident record, data use and retention.
- Chapter 9, “Audit and export,” covers what is recorded, audit and regulatory packs, scheduled attestations, automated exports and access audits.
- Chapter 10, “Billing and subscription,” and Chapter 11, “Zylergy support access,” cover your subscription and how Zylergy support can access your account.
- Appendix A describes the roles. Appendix B lists the settings. The Glossary and the Index follow.

Documentation set

DOCUMENT	NUMBER	FOR
Zylergy Facilities Quick Start Guide	ZY-FAC-QSG-01	New users: first sign-in and a first job
Zylergy Facilities Operator Guide	ZY-FAC-OPG-01	Everyday work in the app and the web console, and a reference for every screen
Zylergy Facilities Admin Guide (this guide)	ZY-FAC-ADG-01	Administrators: account, users and roles, the Company Brain, integrations, data and security

Conventions

CONVENTION	MEANING	EXAMPLE
Bold	A label on the screen: a button, tab, menu item, field or status, written exactly as the screen shows it	Tap **Start the checklist**.
Monospace	A value you type or read: serial numbers, readings, codes, document numbers	Enter 118.
A > B	A path through menus or settings	**Menu** > **Offline & pack**
Italic	The title of another document, or a term at the point where it is defined	*Zylergy Facilities Admin Guide*

Sample data.	Every screen in this guide shows sample data	Figure captions

Procedures are numbered steps. Do the steps in order. Each step is one action. Some procedures start with a **Before you begin** box that lists what must be ready first. Most end with a **Result** line that tells you what you see when the procedure worked. The line under a procedure title tells you who does the task and on which device.

This guide uses four kinds of notice:

⚠ WARNING

Indicates a hazardous situation which, if not avoided, could result in death or serious injury. A warning states the hazard, what can happen, and how to avoid it.

⚠ CAUTION

Indicates a situation which, if not avoided, could result in minor or moderate injury, damage to equipment, or the loss or corruption of records.

NOTE

Information that helps you complete the task or understand its result.

TIP

A faster or easier way to do something.

Send us your comments

To report an error or suggest an improvement to this guide, write to hello@zylergy.com. Include the document number (`ZY-FAC-ADG-01`), the revision (A) and the page number.

Contents

About this guide iv

- Who this guide is for iv
- How this guide is organized iv
- Documentation set v
- Conventions v
- Send us your comments vi

1 Administration overview 1

- 1.1 Who administers Zylergy Facilities 1
- 1.2 Setup checklist 2
- 1.3 Before you go live 3
- 1.4 This guide and the Operator Guide 4
- 1.5 Where settings live 5

2 Account, sites and buildings 6

- 2.1 Your organization 6
- 2.2 Sign-in settings 7
- 2.3 Sites, buildings and locations 8
- 2.4 Portfolios 9

3 Users and access 10

- 3.1 Roles 10
- 3.2 Invite a user 11
- 3.3 Grant access to assets 12
- 3.4 Contractor access 12
- 3.5 Typical set-ups 13
- 3.6 Change a user's access or remove a user 14
- 3.7 Audit of access grants 14
- 3.8 Troubleshooting access 14

4 The Company Brain: asset registry and documents 16

- 4.1 The asset record 17
- 4.2 Add an asset 17
- 4.3 QR tags 18
- 4.4 Onboard a building's asset fleet 19

4.5 Reconcile with your CMMS 19
4.6 Manuals and documents 20
4.7 Manufacturer-licensed content 20
4.8 The learning loop 20
4.9 Audit of manual access 21
4.10 Keep the registry current 21
4.11 Change, move or retire an asset 22

5 Schedules and obligations 23
5.1 How work is generated 23
5.2 Preventive maintenance intervals 24
5.3 Cadence learning 25
5.4 How a schedule becomes work: an example 25
5.5 Compliance obligations and governing authorities 26
5.6 Warranty events and service contracts 28
5.7 Credentials on file 29

6 Contractors and the marketplace 30
6.1 Known contractors and service agreements 30
6.2 Choosing where work goes 31
6.3 Requests for proposal to one contractor 31
6.4 The marketplace 32
6.5 Contractor service levels 33

7 Integrations 34
7.1 CMMS overlay or standalone mode 35
7.2 Plan the integration 35
7.3 Where work is done in each mode 36
7.4 Supported CMMS 36
7.5 What is exchanged 36
7.6 Connect a CMMS 37
7.7 Building systems and condition-based triggers 37
7.8 Parts handoff 38
7.9 Integration credentials and the credential vault 38
7.10 Other integrations 38
7.11 Troubleshooting integrations 39

8 Data, privacy and security 40
8.1 Isolation between organizations 40
8.2 Encryption 40
8.3 Access control 41
8.4 The tamper-evident compliance record 41
8.5 Data collected and retention 41
8.6 Data use and model training 41

8.7 Data on devices 42
8.8 Your organization's part 42
8.9 Hosting and data location 42

9 Audit and export 43
9.1 What is recorded 43
9.2 Audit packs and regulatory packs 44
9.3 Set up scheduled attestations 44
9.4 Set up automated audit exports 45
9.5 Access audits 45
9.6 Writing back to your CMMS 45
9.7 Prepare for an audit 45
9.8 Exporting all your data 46

10 Billing and subscription 47

11 Zylergy support access 48
11.1 How support staff access your organization 48
11.2 Give consent for a support session 49
11.3 Before you contact support 49
11.4 What support can do 49

A Roles reference 51

B Settings reference 53

Glossary 55

Index 62

Figures

Tables

Table 1-1 Who does what . . . 1
Table 1-2 Setup checklist . . . 2
Table 1-3 Go-live checks for a building . . . 3
Table 1-4 Where each kind of work is covered . . . 4
Table 1-5 Where settings live . . . 5

Table 2-1 How users sign in . . . 7
Table 2-2 How assets are organized . . . 8

Table 3-1 Roles in Zylergy Facilities . . . 11
Table 3-2 Levels of asset access . . . 12
Table 3-3 Typical roles and asset access . . . 13
Table 3-4 Troubleshooting users and access . . . 14

Table 4-1 What an asset record holds . . . 17
Table 4-2 Where each part of the asset brain comes from . . . 21

Table 5-1 Sources of work . . . 23
Table 5-2 From interval to compliance entry . . . 25
Table 5-3 Governing authorities used in Zylergy Facilities . . . 26
Table 5-4 Examples of obligations by asset class . . . 28

Table 6-1 Guidance for routing destinations . . . 31

Table 7-1 Modes . . . 35
Table 7-2 Where each task is done in each mode . . . 36
Table 7-3 Data exchanged with a CMMS . . . 36
Table 7-4 Troubleshooting integrations . . . 39

Table 9-1 What Zylergy Facilities records 43

Table 11-1 Support actions 49

Table A-1 Roles and what they do 51

Table B-1 Personal settings in the app 53
Table B-2 Personal settings in the web console 53
Table B-3 Organization and operational settings 54
Table B-4 Defaults of organization settings 54

1 CHAPTER 1

Administration overview

IN THIS CHAPTER

- Who administers Zylergy Facilities 1
- Setup checklist 2
- Before you go live 3
- This guide and the Operator Guide 4
- Where settings live 5

Setting up Zylergy Facilities takes more than one person.

1.1 Who administers Zylergy Facilities

Administration has two parts. Technical administration covers access and systems. Operational setup covers the maintenance content that daily work depends on. Table 1-1 shows who usually does each part.

Table 1-1 Who does what

JOB	ROLE	RESPONSIBLE FOR	CHAPTERS
administrator	Admin	Your organization's IT administrator. Sign-in and session settings, users and their access, integrations with your CMMS and building systems and their integration credentials, data and security settings, and consent to Zylergy support access.	2 (account and sign-in), 3, 7, 8, 9 (access audits), 11
facility manager	Back office	Sites, buildings and locations, the asset registry and QR tags, manuals, preventive maintenance intervals, compliance obligations and warranty events, and known contractors with their service agreements and credentials.	2 (sites), 4, 5, 6

portfolio administrator	Back office	Cross-site compliance, routing and marketplace policy for a portfolio of sites, and qualification of marketplace contractors.	2 (portfolios), 6
compliance officer	Back office	Regulatory packs, scheduled attestations and automated audit exports across the portfolio.	9

The first line of each procedure names the job or role that does it. Appendix A describes each role.

1.2 Setup checklist

Set up Zylergy Facilities in the order below. The work queue, routing and the compliance record depend on the asset registry, the manuals and the baseline of obligations. Put these in place before you go live.

Table 1-2 Setup checklist

STEP	TASK	WHO	SEE
1	Confirm the organization and sign-in settings, including single sign-on	Administrator	Chapter 2
2	Create your sites, buildings and locations	Facility manager	Chapter 2
3	Invite users, assign their roles and grant access to assets	Administrator	Chapter 3
4	Decide between CMMS overlay and standalone mode. If you use a CMMS, arrange its connection with Zylergy's engineers.	Administrator, with the facility manager	Chapter 7
5	Onboard the asset fleet of each building: asset records, nameplate capture and QR tags	Facility manager	Chapter 4
6	Add your own manuals for the assets	Facility manager	Chapter 4
7	Establish the baseline of obligations and preventive maintenance intervals	Facility manager	Chapter 5
8	Record the credentials of your staff, and add your known contractors with their agreements and credentials	Facility manager	Chapter 5, Chapter 6
9	Set marketplace policy and qualification, if you will use the marketplace	Portfolio administrator	Chapter 6
10	Connect building systems for condition-based triggers, where your buildings have them	Administrator	Chapter 7

11	Run the first guided jobs, the first contractor handoff and the first audit pack	Facility manager	*Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01)

> **TIP**
> Onboard one building completely, from asset records to the first audit pack, before you onboard the next. Gaps in one building's registry or obligations show up quickly in its work queue and compliance record.

1.3 Before you go live

When the setup checklist is complete for a building, make these checks before your teams rely on Zylergy Facilities there. The screens they use are described in the *Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01).

Table 1-3 Go-live checks for a building

CHECK	HOW	WHO
Each in-scope asset has a record and a registered QR tag	Walk the building and scan each tag. Each scan must open the right asset brain.	Facility manager
Each asset has the manuals its maintenance needs	Open the asset brain of each asset class and look under **Manuals**.	Facility manager
The work queue shows what you expect	Open **Queue** for the building with **All** selected. Compare it with your current maintenance and compliance calendar.	Facility manager
Regulated obligations record the credential the work requires	Create a draft work order for an elevator inspection. Check that only qualified technicians and contractors are offered.	Facility manager
People see only what they should	Ask a technician and a contractor to sign in and confirm the assets they see.	Administrator
The CMMS connection writes back	Complete a test job and check that the completion reaches the CMMS.	Administrator

A job reaches the compliance record and the audit pack	Complete one guided job, check its compliance entry, and export an audit pack for the building.	Facility manager

Zylergy customer success can help with your first guided jobs, contractor handoffs and compliance audit. To arrange this, contact Zylergy support (“Before you contact support” on page 49).

1.4 This guide and the Operator Guide

Daily work in the app and the web console is covered in the *Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01). Table 1-4 shows which guide covers each kind of work.

Table 1-4 Where each kind of work is covered

WORK	GUIDE
Sign-in settings, users and access, integrations, security, support access	This guide
Sites, asset records, QR tags, manuals, intervals, obligations, contractors, marketplace policy	This guide
Setting up scheduled attestations and automated exports	This guide
The walk-through, the work queue, routing, guided jobs and proof	Operator Guide
Reading the compliance record and exporting audit packs and regulatory packs	Operator Guide
The portfolio overview and its analytics	Operator Guide
Work as a contractor	Operator Guide

1.5 Where settings live

Table 1-5 shows where each kind of setting is and who changes it.

Table 1-5 Where settings live

KIND OF SETTING	WHERE	WHO
Personal device settings: appearance, glove mode, text size, notifications, quiet hours	The app, under **Menu**	Each user
Personal console settings: console appearance, table density, landing page, email notifications	The web console, personal settings	Each user
Organization settings: sign-in, users and access, integrations, data and security	The web console, administration area	Administrator
Operational setup: sites, assets, QR tags, manuals, intervals, obligations, contractors	The web console	Facility manager
Portfolio policy and marketplace policy	The web console	Portfolio administrator

Appendix B lists the settings described in this guide.

2

CHAPTER 2

Account, sites and buildings

IN THIS CHAPTER

- Your organization 6
- Sign-in settings 7
- Sites, buildings and locations 8
- Portfolios 9

2.1 Your organization

Your organization is your facility operation's account in Zylergy Facilities, with its people, sites, assets, records and settings. Organizations are isolated from each other, so no organization can see another's assets, users, records or manuals ("Isolation between organizations" on page 40).

The organization record holds your organization's name and a billing contact. Subscription details are in Chapter 10.

A person can belong to more than one organization, for example a contractor who works for several operators. When they sign in to the web console, they choose the organization to work in.

2.2 Sign-in settings

Zylergy Facilities uses the same sign-in as the other Zylergy apps. Users enter their work email. What happens next depends on your organization's settings (Table 2-1).

Table 2-1 How users sign in

METHOD	WHERE	WHAT HAPPENS
Single sign-on	App and web console	Users are sent to your company's sign-in page. Single sign-on works with identity providers that use SAML 2.0 or OpenID Connect.
6-digit code	App and web console	Users without single sign-on enter a 6-digit code. It comes by text message to the user's cell phone, or from email or an authenticator app.
Face ID	iPad and iPhone	The app offers Face ID after the first successful sign-in.
Sign-out after inactivity	Web console	The console signs a user out after a period without activity. After sign-in, it returns to where the user was.

Users download the Zylergy Facilities app from the App Store. It runs on iPad and iPhone with iPadOS or iOS 26 or later. The web console runs in current versions of Google Chrome, Microsoft Edge, Safari and Firefox.

To set up sign-in for your organization:

ADMINISTRATOR · WEB CONSOLE

1. Open the organization's sign-in settings in the web console.
2. If your organization uses single sign-on, enter the details of your identity provider.
3. Test sign-in with a test account before you invite users.

RESULT

Users who sign in with an address on your organization's domain are sent to your identity provider.

2.3 Sites, buildings and locations

Assets are grouped under a *site*, which is a building or a campus. Within a site, each asset has a location, such as the roof, the core or a mechanical room. The work queue and the compliance record show one building at a time, the one chosen in the building selector. The portfolio overview shows all sites together.

Table 2-2 How assets are organized

LEVEL	EXAMPLE	USED FOR
Portfolio	All the sites your organization operates	The portfolio overview, regulatory packs and portfolio policy
Site	A building or campus, for example **Building A — Lakeshore**	The building selector, the work queue, the compliance record and audit packs
Location	A place within the site, for example the roof or the core	The asset's location on the asset brain and in search
Asset	A rooftop unit, chiller, elevator, fire pump, set of fire dampers	Everything else

Add a site

FACILITY MANAGER · WEB CONSOLE

1. In the header, click **Sites**.
2. Add a site.
3. Enter the site's name as people will see it in the building selector, for example **Building A — Lakeshore**.
4. Enter the date of the site's next audit, if one is set.
5. Save the site.

RESULT

The site appears in the building selector, under **Sites** and on the portfolio overview.

Add locations to a site

FACILITY MANAGER · WEB CONSOLE

1. Open the site under **Sites**.
2. Add the locations where its assets are, for example the roof, the core, each floor and each mechanical room.

3 Save the site.

RESULT

The locations can be chosen when you create asset records for the site, and people can search for assets by location.

2.4 Portfolios

If your organization operates several sites, the portfolio overview shows compliance and work across them. You can drill into each site and asset class. A portfolio administrator sets policy across the sites: how compliance is tracked, the routing strategy and marketplace policy (“Set marketplace policy” on page 32).

3 CHAPTER 3

Users and access

IN THIS CHAPTER

- Roles 10
- Invite a user 11
- Grant access to assets 12
- Contractor access 12
- Typical set-ups 13
- Change a user's access or remove a user 14
- Audit of access grants 14
- Troubleshooting access 14

Access to Zylergy Facilities is set per user. Each user has one or more roles, and access to the assets they work on. Inviting users, assigning roles and granting access to assets are tasks for the **Admin** role.

3.1 Roles

Zylergy products have four *roles*: **Admin**, **Back office**, **Field tech** and **Customer**. Zylergy Facilities uses **Admin**, **Back office** and **Field tech**. The administrator assigns one or more of them to each user. In a small operation, one person can hold **Admin** and **Back office**. Table 3-1 shows what each role does and which jobs in this guide use it.

Table 3-1 Roles in Zylergy Facilities

ROLE	WHAT USERS WITH THIS ROLE DO	JOBS
Admin	Manage users and their access to assets, sign-in, organization settings, integrations and integration credentials, data and security settings, and consent to Zylergy support access. Work in the web console.	IT administrator
Back office	Plan, route and supervise the maintenance work in the web console: the work queue, work orders, the compliance record, audit and regulatory packs, attestations, the portfolio overview, and the operational setup in chapters 2 and 4 to 6.	Facility manager (who also uses the app on the walk-through), dispatcher, compliance officer, portfolio administrator
Field tech	Do the work at the asset in the app: identify the asset, follow the guided checklist, record readings and capture proof.	In-house technician
Contractors	Outside your organization. A contractor's technicians hold **Field tech** and do the work in the app. A contractor's office staff, who review requests for proposal and bid, hold **Back office** in the contractor's account. Both see only the assets of the work routed to them or covered by the contractor's service agreement.	Contractor's technician, contractor's office staff

Auditors, insurers, building owners and authorities having jurisdiction are not users. They receive the audit pack and regulatory packs as PDFs.

3.2 Invite a user

ADMINISTRATOR (ADMIN) · WEB CONSOLE

BEFORE YOU BEGIN

- You know the person's work email address and the roles they need.

1. Open the list of users in the administration area of the web console.
2. Invite a new user.
3. Enter the person's work email address.
4. Choose the person's roles.
5. Grant access to the sites, groups or assets the person will work on ("Grant access to assets" on page 12).
6. Send the invitation.

RESULT

The person receives a join link by email. After the first sign-in, they see only what their roles and asset access allow.

If an invitation does not arrive, check the address and send it again. Zylergy support can also resend an invitation (Chapter 11).

3.3 Grant access to assets

Asset access controls which assets a person can see and work on. You can grant it at three levels and combine them.

Table 3-2 Levels of asset access

LEVEL	GRANTS ACCESS TO	TYPICAL USE
Per asset	One asset	A specialist who works on one piece of equipment.
Per group	A group of assets, such as all the assets in a site or all the elevators in a portfolio	In-house technicians and facility managers.
Per contract	The assets covered by a contract or service agreement	Contractors and their technicians.

ADMINISTRATOR (ADMIN) · WEB CONSOLE

1. Open the user in the administration area.
2. Choose the level of the grant: an asset, a group or a contract.
3. Choose the assets, the group or the contract.
4. Save the grant.

RESULT

The person sees the granted assets and the manuals for them from the next sign-in or refresh. The grant is recorded in the audit of access grants (“Audit of access grants” on page 14).

3.4 Contractor access

Contractors are outside your organization. A contractor’s technicians hold **Field tech**. A contractor’s office staff, who review requests for proposal and bid, hold **Back office** in the contractor’s account. They get access only to the assets of the work routed to them:

- A work order routed directly to a contractor gives access to its asset at routing.

- A request for proposal gives access to its asset when the contractor accepts it.
- Marketplace work gives access to its asset when the contractor is awarded the work.
- A contractor under a service agreement can have standing access to the assets the agreement covers, through a per-contract grant (“Grant access to assets” on page 12).

Each grant is recorded and can be audited, whether you make it or it follows from routing, acceptance or an award.

Contractor companies set up their own accounts for the marketplace (Chapter 6).

3.5 Typical set-ups

Table 3-3 shows common combinations of role and asset access. Adapt them to your organization.

Table 3-3 Typical roles and asset access

PERSON	ROLE	ASSET ACCESS
Facility manager for one building	Back office	Per group: all assets in the site
Facility manager for a portfolio	Back office	Per group: all assets in each site of the portfolio
In-house HVAC technician	Field tech	Per group: the HVAC assets of the sites they cover
Elevator contractor under a service agreement	Back office, in the contractor’s account	Per contract: the elevators covered by the agreement
Contractor’s technician for that contractor	Field tech	Per contract, through the contractor
Marketplace contractor	Back office, in the contractor’s account	None in advance. Access to the asset on award.
Dispatcher	Back office	Per group: the sites they schedule
Compliance officer	Back office	Per group: all sites in the portfolio
Portfolio administrator	Back office	Per group: all sites in the portfolio
IT administrator	Admin	None. The administrator does not work on assets.

> **TIP**
> Grant access by group or contract wherever you can. Grants for single assets are harder to review and easy to forget when a person's work changes.

3.6 Change a user's access or remove a user

ADMINISTRATOR (ADMIN) · WEB CONSOLE

1. Open the user in the administration area.
2. To change the person's roles, add or remove a role.
3. Save the change.
4. To remove access to assets, remove the grant.
5. To remove the user, deactivate the account.

RESULT

The change takes effect at the user's next sign-in or refresh. It is recorded in the audit of access grants.

Removing a user does not remove their work from the record. Compliance entries written by that person stay in the append-only compliance record, attributed to them.

3.7 Audit of access grants

Each access grant is recorded: who granted what to whom, when, and at which level. Grants that follow from routing, acceptance and award are recorded too. Use the audit to review who can see which assets, for example before an audit or when a contractor relationship ends. See also "Access audits" on page 45.

3.8 Troubleshooting access

Table 3-4 Troubleshooting users and access

PROBLEM	LIKELY CAUSE	WHAT TO DO
A person cannot sign in	They were not invited with this address, or single sign-on does not recognize them.	Check the address on the invitation and their account with your identity provider.
An invitation did not arrive	The address is wrong, or the message was filtered.	Check the address and send the invitation again, or ask Zylergy support to resend it.

A technician cannot see an asset	The asset is not in any of their grants.	Grant access to the asset, its group or its contract.
A contractor sees no asset after a request for proposal	The contractor has not accepted the request for proposal yet.	Ask the contractor to accept it.
A person still sees assets after their work changed	An old grant is still in place.	Review their grants and remove the ones they no longer need.
A manual is missing for a technician	The technician is not authorized for the asset, or no manual has been added.	Check the technician's grants, then the asset's manuals with the facility manager.

4

CHAPTER 4

The Company Brain: asset registry and documents

IN THIS CHAPTER

- The asset record 17
- Add an asset 17
- QR tags 18
- Onboard a building's asset fleet 19
- Reconcile with your CMMS 19
- Manuals and documents 20
- Manufacturer-licensed content 20
- The learning loop 20
- Audit of manual access 21
- Keep the registry current 21
- Change, move or retire an asset 22

The *Company Brain* holds your organization's records, manuals, history and photos in Zylergy. Access to it is set per user. In Zylergy Facilities, you see the Company Brain one asset at a time, as the asset brain. The asset brain is built on the asset registry. The registry holds one *asset record* for each serviceable asset, with its QR tag and the manuals your organization holds for it.

Facility managers set up and maintain the registry and the manuals.

4.1 The asset record

The asset brain, the scheduler, the work queue, routing, the guided checklist and the compliance record all use the asset record.

Table 4-1 What an asset record holds

FIELD	CONTENTS
Identity	Make, model and serial number.
Asset ID	The identifier people see, for example `RTU-4` or `Elevator-1`.
Asset class	For example rooftop unit, chiller, air handler, elevator, fire pump, fire dampers, cooling tower or fire panel.
Site and location	The site and the location within it.
Specifications	Values for the asset class, for example capacity and refrigerant for a rooftop unit.
Building owner or operator	The building owner or the operator of the asset.
Purchase invoice	The invoice, with price, installation date and installer.
QR tag	The tag registered to the asset (“QR tags” on page 18).
Manuals	The manuals and drawings for the asset (“Manuals and documents” on page 20).
History	The asset’s maintenance and compliance history, from its compliance entries.

4.2 Add an asset

You can enter an asset’s details by hand, or capture them from its nameplate with the camera and confirm what was read.

FACILITY MANAGER · WEB CONSOLE, IPAD OR IPHONE

BEFORE YOU BEGIN

- The asset’s site and location exist (“Sites, buildings and locations” on page 8).
- You are at the asset, if you capture the nameplate.

1 Start a new asset record for the site.

2 Capture the asset's nameplate with the camera, or enter the make, model and serial number by hand. If you captured the nameplate, the record shows the make, model and serial number it read.

> **⚠ CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

3 Compare each value with the nameplate and correct any that do not match.
4 Confirm the values.
5 Enter the asset ID, asset class, location and specifications.
6 Attach the purchase invoice, if you have it.
7 Save the record.
8 Register its QR tag ("Register a tag to an asset" on page 18).

RESULT

The asset is in the registry. Once its tag is registered, scanning the tag opens its asset brain.

Values read from a nameplate are saved only after you confirm them.

4.3 QR tags

A *QR tag* is a branded label with a QR code bound to one asset record. Scanning a registered tag opens that asset. The camera can confuse two assets of the same model, but each tag is unique, so the QR tag is the most reliable way to identify an asset.

Register a tag to an asset

FACILITY MANAGER · IPAD OR IPHONE · AT THE ASSET

1 Generate the QR tag for the asset from its record.
2 Print the tag.
3 Attach the tag to the asset where it can be reached and scanned.
4 Scan the tag with the app.
5 Check that the app shows the asset you are tagging.
6 Confirm the registration.

RESULT

The tag is registered to the asset. From now on, scanning it opens the asset brain for this asset.

4.4 Onboard a building's asset fleet

With bulk provisioning, you generate and register QR tags for a whole building at once and capture nameplates to fill in the records faster.

FACILITY MANAGER · WEB CONSOLE AND IPAD OR IPHONE

BEFORE YOU BEGIN

- The site and its locations exist.
- If you use Zylergy Facilities with a CMMS, the CMMS is connected first, so that asset records are filled in from it ("Reconcile with your CMMS" on page 19).

1. In the web console, choose the building to onboard.
2. Generate QR tags for the building's in-scope assets.
3. Print the tags.
4. Walk the building with the app.
5. At each asset, attach a tag.
6. Scan the tag.
7. Capture the nameplate.
8. Confirm the asset's values against the nameplate.
9. Back in the web console, review the building's assets for missing records or missing tags.

RESULT

Each in-scope asset has a complete asset record and a registered QR tag. The building is ready for its manuals and obligations.

If a CMMS is connected, the asset records are filled in from the CMMS asset list. You add the tags and confirm the nameplates.

4.5 Reconcile with your CMMS

If your organization uses Zylergy Facilities with a CMMS, asset records are filled in from the CMMS asset list and reconciled against it. If Zylergy Facilities and the CMMS disagree about an asset, for example on a serial number or a location, Zylergy Facilities shows you the conflict and overwrites neither value. Decide which value is correct for each conflict.

For the CMMS connection, see Chapter 7.

4.6 Manuals and documents

The manuals you add for an asset are used for the asset brain, the maintenance scope and intervals, the task packages and the guided checklists. Zylergy Facilities digitizes each manual with text recognition and extracts the manufacturer's maintenance scope and intervals from it.

Manuals you add belong to your organization and are private to it by default. Only technicians authorized for the asset can open them. Each access is recorded ("Audit of manual access" on page 21).

Add a manual

FACILITY MANAGER · WEB CONSOLE

1. Open the asset, or the asset class, in the web console.
2. Add the manual file.
3. Choose the type of document, for example service manual or wiring diagram.
4. Save the manual. Zylergy Facilities digitizes the manual and extracts the maintenance scope and intervals.
5. Check the intervals extracted from the manual against the manual itself ("Preventive maintenance intervals" on page 24).

RESULT

The manual appears on the asset brain under **Manuals** for people authorized for the asset, and its intervals are available to the scheduler.

4.7 Manufacturer-licensed content

Some manufacturers license their manuals to Zylergy for use across organizations. Licensed content can be made available to your organization for the assets it covers. All other content, including the manuals you add, stays private to your organization.

4.8 The learning loop

With the *learning loop*, Zylergy Facilities uses verified outcomes to refine the asset brain: the procedures, the task packages and the PM intervals. A verified outcome is a completed job that cleared its verification gate, with its proof. Changes are versioned and monitored, and they can be rolled back. Photos and verified outcomes from the field are also used to fine-tune Zylergy's vision models. Your customer agreement sets the terms for how your organization's data is used ("Data use and model training" on page 41).

4.9 Audit of manual access

Each time a manual is opened, in the app or the web console, Zylergy Facilities records who opened it and when. Use this audit to show that manuals were accessible only to authorized technicians.

4.10 Keep the registry current

The asset brain, the queue and the compliance record depend on an accurate registry. To keep it accurate:

- When an asset is installed, create its record, register its tag and add its manuals before it is put into service.
- When a tag is damaged or missing, replace it and register the new tag.
- When an asset is replaced, retire the old record and create a new one. Each record then keeps its own history.
- When a technician reports that a tag and a nameplate disagree, correct the record or move the tag the same day.
- After a manufacturer issues a new manual revision, add it and check the extracted intervals.

Table 4-2 Where each part of the asset brain comes from

PART OF THE ASSET BRAIN	COMES FROM
Identity and specifications	The asset record (“The asset record” on page 17)
Manuals	Manuals added by your organization, and licensed content (“Manuals and documents” on page 20, “Manufacturer-licensed content” on page 20)
Purchase invoice	The invoice attached to the asset record
Maintenance log	Compliance entries of completed jobs
Compliance status and what is due	Obligations, intervals and warranty events (Chapter 5)
How it was identified	The QR tag registration, or point-and-identify

4.11 Change, move or retire an asset

Edit an asset record when its details change. A retired asset’s compliance entries stay in the compliance record.

5 CHAPTER 5

Schedules and obligations

IN THIS CHAPTER

- How work is generated 23
- Preventive maintenance intervals 24
- Cadence learning 25
- How a schedule becomes work: an example 25
- Compliance obligations and governing authorities 26
- Warranty events and service contracts 28
- Credentials on file 29

The work queue is filled from schedules and obligations. Facility managers set up the baseline before a building goes live and keep it current.

5.1 How work is generated

Each source in Table 5-1 raises a trigger when work comes due. The trigger appears in the work queue with its asset, obligation, due date, type and status.

Table 5-1 Sources of work

SOURCE	RAISES	QUEUE TYPE	SET UP IN
Preventive maintenance intervals	Maintenance due under the manufacturer's interval, as set for your assets	**PM**	"Preventive maintenance intervals" on page 24
Compliance obligations	Inspections, certifications and logs required by a governing authority	**Compliance**	"Compliance obligations and governing authorities" on page 26

Warranty events	Checks required to keep a warranty in force, and warranty end dates	**Warranty**	“Warranty events and service contracts” on page 28
Your CMMS	Work orders and schedules read from the CMMS in overlay mode	As in the CMMS	Chapter 7

Condition-based triggers from existing building systems also raise work (“Building systems and condition-based triggers” on page 37).

5.2 Preventive maintenance intervals

Preventive maintenance intervals start from the manufacturer’s documentation for each asset class. When you add a manual, Zylergy Facilities extracts the maintenance scope and intervals from it. Each interval links to the manual page it was taken from, so you and an auditor can check its source. In the compliance record, obligations based on these intervals show **Manufacturer interval** as their authority.

You can edit an interval, for example because of your building’s conditions or a manufacturer’s service bulletin.

Edit an interval

FACILITY MANAGER · WEB CONSOLE

1. Open the preventive maintenance schedule for the asset or asset class.
2. Find the interval.
3. Check the manual page the interval comes from.
4. Enter the new interval and the reason for the change.
5. Save the change.

RESULT

The next due date is recalculated from the new interval, and the change is recorded with who made it, when and why.

5.3 Cadence learning

With *cadence learning*, Zylergy Facilities refines the PM interval for an asset class from verified outcomes across a portfolio. The outcomes can show that the class needs maintenance more or less often than the manufacturer's baseline. Each refinement is recorded, attributed and reversible. The use of refinements for other organizations follows the terms of your customer agreement ("Data use and model training" on page 41).

> NOTE
> Review refined intervals for your buildings. A code or standard can set a cycle that a PM interval must not exceed. Keep obligations with such a cycle under their governing authority ("Compliance obligations and governing authorities" on page 26).

5.4 How a schedule becomes work: an example

Table 5-2 follows one obligation through Zylergy Facilities. It uses the sample rooftop unit RTU-4 from the screens in the *Zylergy Facilities Operator Guide*.

Table 5-2 From interval to compliance entry

STAGE	WHAT HAPPENS	WHERE YOU SEE IT
Interval	The manufacturer's service manual for the unit's model gives a quarterly PM. The interval is extracted when the manual is added and can be traced to its page.	The asset's schedule, and **Manufacturer interval** in the compliance record
Due	When the PM falls due, it appears in the work queue with the type **PM** and a status such as **Due in 5 days**.	**Queue**
Work order	The facility manager creates a work order. Zylergy Facilities builds the task package from the asset brain.	**New work order**
Routing	The PM needs no special credential, so the facility manager routes it to an in-house technician and schedules the visit. The routing rationale is recorded.	**New work order** and the compliance record

Work	The technician follows the guided checklist, records the pressures against their acceptance range and captures the proof photo.	The app
Verification	The job clears its verification gate and is verified.	The app and **Compliance**
Record	The compliance entry is written: who, when, what, the proof. The next due date moves forward by the interval.	**Compliance** and the asset's maintenance log

If the obligation had required a credential, for example an elevator safety inspection under ASME A17.1, routing would have blocked an in-house technician without a QEI credential on file and recommended a qualified contractor.

5.5 Compliance obligations and governing authorities

An *obligation* is a maintenance, inspection, compliance or warranty requirement on an asset, with a due date and a *governing authority*. A baseline of obligations is set up for each building before it goes live. The compliance record and the audit pack are built from the obligations.

Table 5-3 Governing authorities used in Zylergy Facilities

GOVERNING AUTHORITY	WHAT IT COVERS	EXAMPLE OBLIGATION
ASME A17.1	Safety code for elevators and escalators	Annual safety inspection of an elevator
EPA 608	Refrigerant handling under Section 608 of the Clean Air Act	Refrigerant log for a rooftop unit
NFPA 25	Inspection, testing and maintenance of water-based fire protection systems	Annual certification of a fire pump
NFPA 80	Fire doors and other opening protectives	Fire damper inspection on its cycle
Manufacturer interval	The manufacturer's maintenance schedule	Quarterly PM on a rooftop unit

An elevator safety inspection under ASME A17.1 requires a QEI (Qualified Elevator Inspector) credential. Refrigerant work under EPA 608 requires EPA 608 certification. Work under a manufacturer interval needs no credential unless the task needs one.

Other obligations, such as a cooling tower water treatment certification or an annual fire panel test, can also be tracked.

Add an obligation

FACILITY MANAGER · WEB CONSOLE

1. Open the asset in the web console.
2. Add an obligation.
3. Enter what is required, for example **Annual safety inspection**.
4. Choose the governing authority.
5. Enter the interval or cycle and the next due date.
6. If the work requires a credential, choose it.
7. Save the obligation.

RESULT

The obligation appears on the asset's compliance record, and in the work queue when it falls due. Routing checks the credential you chose.

> **⚠ WARNING**
>
> **Regulated work requires a qualified person.** Elevator, fire protection and other regulated inspections and repairs must be performed by a person who holds the required credential. Zylergy Facilities records credentials and blocks unqualified assignments, but it does not authorize anyone to enter a hoistway, pit or machine room. Follow the access rules of the building and the requirements of the governing authority.

Zylergy Facilities can block an unqualified assignment only if the obligation records the credential the work requires. Check every regulated obligation for its credential when you establish the baseline.

Establish a building's baseline

Before a building goes live, establish its baseline of obligations and intervals so that the work queue and the compliance record are complete from the first day.

FACILITY MANAGER · WEB CONSOLE

BEFORE YOU BEGIN

- The building's asset records exist and its manuals have been added.

1. For each asset class, review the intervals extracted from the manuals and correct any that differ from the manual page they cite.

2. For each asset, add the compliance obligations that apply to it, with their governing authority, cycle and next due date.
3. For each regulated obligation, choose the credential the work requires.
4. Add warranty events from the purchase invoices and warranty terms.
5. Open **Queue** for the building.
6. Check that what is due matches your current calendar.
7. Open **Compliance** for the building.
8. Check that every obligation shows its last completed date, where you have one.

RESULT

The building's work queue and compliance record are complete, and routing checks credentials for regulated work.

For each obligation, you can enter a last completed date from before you used Zylergy Facilities, so that next due dates are right.

Table 5-4 Examples of obligations by asset class

ASSET CLASS	OBLIGATION	GOVERNING AUTHORITY
Elevator	Annual safety inspection	ASME A17.1, with a QEI inspector
Elevator	Monthly PM	Manufacturer interval
Rooftop unit	Quarterly PM, belt and filter PM	Manufacturer interval
Rooftop unit	Refrigerant log	EPA 608
Chiller	Quarterly PM	Manufacturer interval
Air handler	Quarterly PM	Manufacturer interval
Air handler	Compressor warranty check	Warranty terms
Fire pump	Annual certification	NFPA 25
Fire dampers	Damper inspection on its cycle	NFPA 80

5.6 Warranty events and service contracts

Warranty events raise work as compliance obligations do. A warranty check, for example on a compressor, appears in the work queue with the type **Warranty** when it falls due. Enter each asset's warranty terms and dates on its asset record so that the checks come due on time.

Service contracts with your contractors are recorded with the contractor ("Known contractors and service agreements" on page 30).

5.7 Credentials on file

A *credential* is a certification a person must hold to perform regulated work, such as a QEI elevator inspector credential or EPA 608 certification. Routing uses the credentials on file to decide who can be assigned a job. An in-house technician without a required credential is blocked, and a qualified contractor is recommended. Routing shows the credential and its expiration date, for example **Certified inspector — QEI-1 #48122 · exp 03/2027**.

FACILITY MANAGER · WEB CONSOLE

1. Open the person's record, or the contractor's record.
2. Add the credential: its type, number and expiration date.
3. Attach a copy of the certificate, if your organization keeps one.
4. Save the credential.

RESULT

Routing takes the credential into account for obligations that require it.

6

CHAPTER 6

Contractors and the marketplace

IN THIS CHAPTER

- Known contractors and service agreements 30
- Choosing where work goes 31
- Requests for proposal to one contractor 31
- The marketplace 32
- Contractor service levels 33

Contractors do work that your staff cannot or should not do, such as certified elevator inspections, fire protection certifications and specialist mechanical work. You can work with known contractors under service agreements, and you can offer work to qualified contractors who bid through the marketplace. The facility manager maintains the known contractors, and the portfolio administrator sets marketplace policy.

6.1 Known contractors and service agreements

A *contractor* is an outside company, such as an elevator or mechanical service firm, that carries out work routed to it under a service agreement. Its access is limited to the assets it is authorized for. At routing, each known contractor appears as a card. The card shows whether a service agreement is on file, the contractor's credential, its rate and its next availability.

FACILITY MANAGER · WEB CONSOLE

1. Open the contractors in the web console.
2. Add a contractor.
3. Enter the company's name and contact details.
4. Record the service agreement: the assets or sites it covers and its dates.

5 Add the contractor's credentials ("Credentials on file" on page 29).
6 Save the contractor.

RESULT

The contractor appears as a routing option for work orders on the assets its agreement covers, and is recommended when it holds a credential the obligation requires.

To give a contractor standing access to the assets its agreement covers, the administrator makes a per-contract grant ("Grant access to assets" on page 12).

6.2 Choosing where work goes

Facility managers choose a destination for each work order when they route it. To keep the choices consistent, a portfolio administrator can agree on guidance like Table 6-1 and reflect it in marketplace policy ("Set marketplace policy" on page 32).

Table 6-1 Guidance for routing destinations

SITUATION	USUAL DESTINATION
Routine work your staff can do, where they hold any credential the work requires	In-house technician
Work covered by a service agreement, or that needs a credential your staff do not hold	Known contractor under that agreement
Work for which you want a price from one contractor before committing	Request for proposal to one known contractor
Work for which you want competing bids from qualified contractors	Marketplace, where your policy allows it

For each destination, the choice and its rationale are written to the compliance record. The work is done with the guided checklist and through the verification gate.

6.3 Requests for proposal to one contractor

A facility manager can send a work order as a request for proposal to one known contractor. When the contractor accepts, it gets access to the asset and carries out the work order. This *RFP handoff* needs no setup beyond the contractor's record.

6.4 The marketplace

On the *marketplace*, qualified contractors receive requests for proposal, submit bids and are awarded work. A facility manager offers a work order on the marketplace, compares the bids with each contractor's qualification and rating, and awards the work. The awarded contractor gets access to the asset and carries out the work with the guided checklist and through the verification gate. The marketplace is optional.

Set marketplace policy

Marketplace policy sets how the marketplace is used across your portfolio.

PORTFOLIO ADMINISTRATOR · WEB CONSOLE

1. Open the portfolio policy settings in the web console.
2. Choose whether work may be offered on the marketplace, and for which sites, asset classes or obligation types.
3. Set the qualification contractors must meet before they can bid on your work ("Qualification" on page 32).
4. Save the policy.

RESULT

Facility managers can offer on the marketplace only the work that the policy allows, and only qualified contractors can bid.

Qualification

Contractors set up their own company accounts. Before they can bid on your work, they must be qualified. Qualification checks that a contractor holds the credentials the work requires. Work that requires a credential, such as a certified elevator inspection, is offered only to contractors with that credential on file.

Ratings and disputes

Contractors receive ratings for marketplace work. Facility managers see each contractor's rating when they compare bids. A dispute about marketplace work, for example about an award, a rating or the acceptance of work, can be raised and resolved under the marketplace terms.

Marketplace integrity

The marketplace has controls against fraud, abuse and manipulation of bidding. It also watches for work that is awarded on the marketplace and then moved outside it. Zylergy does not publish the details of these controls.

6.5 Contractor service levels

The portfolio overview reports contractor service levels: how contractors perform against their service agreements across your sites. The *Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01) describes them in the chapter “Portfolio overview.”

7

CHAPTER 7

Integrations

IN THIS CHAPTER

- CMMS overlay or standalone mode 35
- Plan the integration 35
- Where work is done in each mode 36
- Supported CMMS 36
- What is exchanged 36
- Connect a CMMS 37
- Building systems and condition-based triggers 37
- Parts handoff 38
- Integration credentials and the credential vault 38
- Other integrations 38
- Troubleshooting integrations 39

Zylergy Facilities connects to your computerized maintenance management system (*CMMS*) and to existing building systems. Zylergy provides each connector. You connect it in the web console with your organization's own integration credentials, and Zylergy's engineers help during onboarding. You pay for the vendors' APIs, either through your subscription or directly to the vendor.

7.1 CMMS overlay or standalone mode

Zylergy Facilities runs in one of two modes. You choose the mode for your organization during setup.

Table 7-1 Modes

MODE	WHEN TO USE IT	WHAT HAPPENS
CMMS overlay	Your organization already runs a CMMS.	Zylergy Facilities reads assets, schedules and work orders from your CMMS and writes completed work and compliance entries back to it. Status changes made in the CMMS are reflected in Zylergy Facilities.
Standalone mode	Your organization has no CMMS.	Zylergy Facilities is your system of record for assets, schedules, work orders and compliance.

In both modes, Zylergy Facilities keeps its own complete copy of your assets and records, the *shadow copy*. In overlay mode, the CMMS wins when the two disagree on asset data. The compliance record and its proof stay complete in Zylergy Facilities even if the CMMS holds less detail.

7.2 Plan the integration

Decide the following with the facility manager before you connect a CMMS:

- **Mode.** Choose overlay if a CMMS remains the system of record for work orders. Otherwise, choose standalone.
- **Sites.** Which sites each CMMS covers, if your portfolio runs more than one.
- **Assets.** Whether the CMMS asset list is complete enough to populate the registry, or whether bulk provisioning in Zylergy Facilities comes first (Chapter 4).
- **Accounts.** The CMMS account Zylergy Facilities will use, and who in your organization owns its credentials.
- **Ownership of conflicts.** Who resolves conflicts between the CMMS and Zylergy Facilities when assets are reconciled (“Reconcile with your CMMS” on page 19).

7.3 Where work is done in each mode

Table 7-2 Where each task is done in each mode

TASK	CMMS OVERLAY	STANDALONE MODE
Keep the list of assets	In the CMMS. Zylergy Facilities reads and reconciles it, and adds QR tags, manuals and obligations.	In Zylergy Facilities
See what is due	The Zylergy Facilities work queue, which includes work orders read from the CMMS	The Zylergy Facilities work queue
Route and schedule work	Zylergy Facilities, with credential checks and the routing rationale	Zylergy Facilities
Carry out work with proof	The Zylergy Facilities app	The Zylergy Facilities app
Keep the completion record	Both: Zylergy Facilities keeps the full compliance record and writes completions back to the CMMS	Zylergy Facilities
Export audit packs	Zylergy Facilities	Zylergy Facilities

7.4 Supported CMMS

Zylergy Facilities connects to IBM Maximo, Fiix, UpKeep and Corrigo. Connect the one you use with your organization's own credentials.

If your portfolio runs more than one CMMS, for example a different one in different buildings, each of them can be connected. Synchronization is two-way with each.

7.5 What is exchanged

Table 7-3 Data exchanged with a CMMS

DIRECTION	DATA
From your CMMS	Assets (which populate and reconcile the asset registry), schedules and work orders.
To your CMMS	Verified completions and their compliance entries.

Both ways	Status changes. A status change made in your CMMS is reflected in Zylergy Facilities. A completion in Zylergy Facilities is written back.

Conflicts found when assets are reconciled are shown to a facility manager to resolve (“Reconcile with your CMMS” on page 19).

7.6 Connect a CMMS

ADMINISTRATOR · WEB CONSOLE

BEFORE YOU BEGIN

- Zylergy has provided the connector for your CMMS (“Supported CMMS” on page 36).
- You have API access to your CMMS and an account in it for Zylergy Facilities to use.
- You and the facility manager have agreed which sites the CMMS covers.

1. Open the integrations in the administration area of the web console.
2. Open the connection to your CMMS.
3. Enter the connection details and the integration credentials for the CMMS. The credentials are stored in the credential vault (“Integration credentials and the credential vault” on page 38).
4. Choose the sites the connection covers.
5. Test the connection.
6. Turn on synchronization.

RESULT

Assets, schedules and work orders are read from the CMMS. The facility manager reviews the reconciled asset records, and from then on completions and compliance entries are written back.

Check the sites a connection covers before you turn on synchronization. Completions and compliance entries are written back to the CMMS records for those sites.

7.7 Building systems and condition-based triggers

If your buildings have systems that report equipment condition, such as a building management system, Zylergy Facilities can use their data to raise *condition-based triggers*. A condition-based trigger raises work from the condition an asset reports, instead of from a fixed interval. It enters the work queue and is routed, carried out and verified like other work.

Zylergy Facilities uses only the systems your buildings already have. It needs no hardware of its own. In buildings without such systems, interval, compliance and warranty work continues as before.

ADMINISTRATOR · WEB CONSOLE

1. Open the integrations in the administration area.
2. Add a building system connection.
3. Enter the connection details and integration credentials.
4. Link the system's equipment to the matching asset records.
5. Test the connection.

RESULT

Conditions reported for linked assets can raise condition-based triggers in the work queue.

7.8 Parts handoff

When a job has a bill of materials, Zylergy Facilities hands it off to your organization's own purchasing process. If your organization has an account with a parts distributor, the bill of materials can go to that distributor on your account instead. Zylergy Facilities does not buy, take title to or resell the parts, and is not a party to the transaction.

7.9 Integration credentials and the credential vault

Integration credentials are the passwords and access tokens that connect Zylergy Facilities to your CMMS, building systems and distributor accounts. They are kept in the encrypted *credential vault*. After a credential is entered, no user can see it, including administrators.

Do not confuse integration credentials with the credentials people hold for regulated work, such as QEI or EPA 608 ("Credentials on file" on page 29).

To change an integration credential, for example after a password change in your CMMS, enter the new value in the integration's settings. The new value replaces the old one.

7.10 Other integrations

Zylergy Facilities connects to your CMMS through the CMMS's own interface.

7.11 Troubleshooting integrations

Table 7-4 Troubleshooting integrations

PROBLEM	LIKELY CAUSE	WHAT TO DO
The connection test fails	Wrong connection details, an expired integration credential, or no API access in the CMMS account.	Check the details, enter a current credential, and check the account's API access in the CMMS.
Assets are missing after the first synchronization	The connection does not cover the sites the assets are in, or the assets are filtered out in the CMMS.	Check the sites the connection covers.
Many conflicts appear after reconciliation	The CMMS and the registry describe the same assets differently.	Ask the facility manager to resolve them before go-live ("Reconcile with your CMMS" on page 19).
Completions do not reach the CMMS	The connection is paused, or the integration credential no longer works.	Check the connection and its credential.
No condition-based triggers arrive	The building system's equipment is not linked to asset records, or the connection is down.	Check the links and test the connection.

8 CHAPTER 8

Data, privacy and security

IN THIS CHAPTER

- Isolation between organizations 40
- Encryption 40
- Access control 41
- The tamper-evident compliance record 41
- Data collected and retention 41
- Data use and model training 41
- Data on devices 42
- Your organization's part 42
- Hosting and data location 42

8.1 Isolation between organizations

Each organization's data is isolated, so no organization can see another organization's assets, users, records, manuals or settings. Manuals your organization adds are private to your organization by default ("Manuals and documents" on page 20).

8.2 Encryption

Building, asset and personnel data is encrypted in transit and at rest. Integration credentials are kept in the encrypted credential vault and are never shown ("Integration credentials and the credential vault" on page 38).

8.3 Access control

Access follows least privilege and is audited:

- Each person sees only the assets they have been granted access to. Technicians and contractors see only the assets they are authorized for.
- Each access grant is recorded (“Audit of access grants” on page 14).
- Each time a manual is opened, the access is recorded (“Audit of manual access” on page 21).
- Zylergy support staff can see your organization only under the rules in Chapter 11.

8.4 The tamper-evident compliance record

The compliance record is append-only and tamper-evident. Each entry is attributed to the person or process that wrote it. Entries can be added but not edited or deleted. A correction is a new entry linked to the original.

8.5 Data collected and retention

Zylergy Facilities collects only the building and personnel data it needs. Your organization’s data is kept while the subscription is active. When your organization leaves, it receives a full export and Zylergy deletes its copies (“Exporting all your data” on page 46).

8.6 Data use and model training

Photos and verified outcomes from the field are used to fine-tune Zylergy’s vision models. The setting **Help our vision models to become better at detecting parts** is on by default and applies to your whole organization. Only the **Admin** role can change it in the app’s settings. Zylergy recommends leaving it on. Technicians do not see the setting. The learning loop also uses verified outcomes to refine PM intervals, procedures, task packages and asset brains (“The learning loop” on page 20, “Cadence learning” on page 25). Each model or PM interval update is attributed and can be reversed.

Your customer agreement sets the terms for how your organization’s data is used. It includes the *data-use authorization*, which covers the use of your outcomes to improve the product for other organizations. Each such use is recorded and can be audited.

8.7 Data on devices

To work offline, the app stores asset brains, manuals and work in progress on the iPad or iPhone. Work recorded offline is held on the device until it synchronizes.

8.8 Your organization's part

Administrators can further protect your organization's data with these practices:

- Use single sign-on where your organization has it, so that leaving the company also ends access to Zylergy Facilities.
- Remove or deactivate users promptly when they leave, and remove grants when a person's work changes ("Change a user's access or remove a user" on page 14).
- End contractor access when a service agreement ends, and review contractor grants regularly ("Contractor access" on page 12).
- Require a passcode or biometric lock on each iPad and iPhone that runs the app, because work and manuals can be stored on the device for offline use.
- Rotate integration credentials under your own policy, and enter the new value in Zylergy Facilities when you do ("Integration credentials and the credential vault" on page 38).
- Review the audits of access grants and manual access on a regular schedule ("Access audits" on page 45).
- Give consent to Zylergy support act-as sessions only for a specific, agreed change (Chapter 11).

8.9 Hosting and data location

For where your organization's data is hosted, contact Zylergy support ("Before you contact support" on page 49).

9 CHAPTER 9

Audit and export

IN THIS CHAPTER

- What is recorded 43
- Audit packs and regulatory packs 44
- Set up scheduled attestations 44
- Set up automated audit exports 45
- Access audits 45
- Writing back to your CMMS 45
- Prepare for an audit 45
- Exporting all your data 46

9.1 What is recorded

Table 9-1 What Zylergy Facilities records

RECORD	WHAT IT HOLDS	WHERE
Compliance entries	Each closed work order: who did the work and with what credential, when, what was done, the proof, and the quality score	The compliance record
Routing decisions	The destination chosen for each work order and its rationale, including in-house, known contractor or marketplace	The compliance record

Verification trail	Each verification gate cleared: who verified, when, against which checklist	The compliance record
Access grants	Who granted what access to whom, and when	The audit of access grants
Manual access	Who opened which manual, and when	The audit of manual access
Support actions	Changes Zylergy support made with your consent, attributed to Zylergy support	Your organization's history (Chapter 11)

Interval edits and refinements from cadence learning are also recorded, with who or what made them and why.

9.2 Audit packs and regulatory packs

An audit pack is a PDF for one asset or one site: obligations against completion, who performed the work with their credentials, the proof, the routing rationale and the verification trail. A regulatory pack covers one governing authority across sites. Facility managers and compliance officers produce them from the compliance record and the portfolio overview. See the *Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01), chapter "The compliance record and audit packs."

9.3 Set up scheduled attestations

An *attestation* is a scheduled statement of your compliance status, produced from the compliance record for a building owner or an authority.

COMPLIANCE OFFICER · WEB CONSOLE

1. Open the attestations for the portfolio.
2. Add an attestation.
3. Choose the governing authority or the sites it covers.
4. Choose how often it is produced.
5. Choose who receives it.
6. Save the attestation.

RESULT

Zylergy Facilities produces the attestation from the compliance record on schedule.

9.4 Set up automated audit exports

An automated audit export delivers audit files for the portfolio on a schedule.

COMPLIANCE OFFICER · WEB CONSOLE

1. Open the automated exports for the portfolio.
2. Add an export.
3. Choose the sites or the governing authority it covers.
4. Choose how often it runs and where it is delivered.
5. Save the export.

RESULT

The export runs on schedule.

Exports are CSV or PDF files.

9.5 Access audits

Administrators can review the audit of access grants and the audit of manual access. These show who could see which assets and who opened which manuals. Review them regularly, and when a contractor relationship ends or a person leaves.

9.6 Writing back to your CMMS

In CMMS overlay mode, verified completions and their compliance entries are written back to your CMMS (Chapter 7). Your CMMS then holds a record of the completion. Zylergy Facilities keeps the full compliance record, including the proof and the verification trail.

9.7 Prepare for an audit

FACILITY MANAGER, COMPLIANCE OFFICER · WEB CONSOLE

1. Open **Compliance** for the building.
2. Look for obligations that are overdue or have no proof.
3. Route any overdue obligation, or record in its routing rationale why it is not yet done.
4. Check that the credentials on file for the people who did regulated work were current when they did it.
5. Ask the administrator to review the audit of access grants for the building.
6. Export the audit pack for the building.
7. Read the audit pack once yourself before you hand it over.

RESULT

You have an audit pack that shows obligations against completion with proof, and you know of any gap before the auditor does.

9.8 Exporting all your data

When your organization leaves Zylergy Facilities, Zylergy provides a full export of its data as CSV and PDF files. Zylergy then deletes its copies of the data and confirms the deletion in writing. To arrange the export, contact Zylergy support (“Before you contact support” on page 49).

10 CHAPTER 10

Billing and subscription

Zylergy Facilities is a subscription billed to the building owner or operator. The subscription covers the use of the product for your organization's sites.

Zylergy Facilities is not a seller of record for parts or services. You buy parts through your own purchasing process or distributor account ("Parts handoff" on page 38).

For questions about your subscription, invoices, payment or the billing contact, contact Zylergy support.

11 CHAPTER 11

Zylergy support access

IN THIS CHAPTER

- How support staff access your organization 48
- Give consent for a support session 49
- Before you contact support 49
- What support can do 49

Zylergy support can help with your account, for example by resending an invitation, resetting a user's sign-in or correcting a role. Support access works the same way in every Zylergy product.

11.1 How support staff access your organization

- **Separate accounts.** Zylergy staff sign in with their own staff accounts, never with your users' accounts, and never appear in your list of users.
- **Assigned organizations only.** A support person can open only the organizations assigned to them.
- **View-as is read-only.** By default, support staff see your organization's console as your administrator sees it, read-only. Export is turned off.
- **Act-as needs your consent.** To make a change on your behalf, a support person needs your administrator's consent, given in the product or by reference to a support ticket. For sensitive changes, a support lead must also approve. The session is limited in time and ends automatically.
- **Changes are visible to you.** Each change made in an act-as session appears in your organization's history, attributed to Zylergy support.
- **Support actions are logged.** Each support action is written to an append-only, tamper-evident log kept by Zylergy.

11.2 Give consent for a support session

ADMINISTRATOR · WEB CONSOLE

1. Agree with Zylergy support on what needs to be changed.
2. Give your consent in the product when support requests it, or give support the reference of your support ticket.
3. After the session, review the changes in your organization's history.

RESULT

Support can make the agreed change for the length of the session. The change appears in your history as made by Zylergy support.

11.3 Before you contact support

Contact Zylergy support in the app under **Menu** > **Help**, or by email at support@zylergy.com. Support is available Monday through Friday, 8 a.m. to 6 p.m. US Central time.

Support can help faster when your request contains the following:

- Your organization's name.
- The user affected and their roles.
- The asset ID, site and work order concerned, if any.
- What you did, what you expected and what happened, with the date and time.
- Whether the problem is in the app, the web console or an integration.
- A screenshot, if you have one.

11.4 What support can do

Table 11-1 Support actions

ACTION
View your account read-only. Export is turned off.
Resend an invitation
Unlock a user
Reset multi-factor sign-in, where your users have it
Change a user's role
Re-run a failed import
Rebuild the data stored on a user's device for offline use

Refresh a distributor connection
Send notifications again

Support needs your consent to change a user's role. A read-only view of your account does not need your consent.

Each action that changes your data produces an entry in your organization's history.

A

APPENDIX A

Roles reference

The administrator gives each user one or more roles and grants access to assets (Chapter 3). Table A-1 lists what each role does, and how contractors take part.

Table A-1 Roles and what they do

ROLE	WHAT USERS WITH THIS ROLE DO	JOBS	WHERE
Admin	Invite users, assign roles and grant access to assets. Set sign-in, data and security settings. Work with Zylergy's engineers to connect your CMMS and building systems, and manage integration credentials. Review the audits of access grants and manual access. Consent to Zylergy support act-as sessions.	IT administrator	Web console
Back office	Work the work queue. Create and route work orders, send requests for proposal, offer work on the marketplace and award bids. Read the compliance record and export audit packs. Generate regulatory packs and set up attestations and automated exports. See the portfolio overview. Manage sites, locations, asset records and QR tags, manuals, PM intervals, obligations and warranty events, known contractors and credentials on file. Set marketplace policy and qualification.	Facility manager, dispatcher, compliance officer, portfolio administrator	Web console. The facility manager also uses the app on the walk-through.
Field tech	Scan and identify assets and read their asset brains. Carry out guided jobs, record readings and capture proof.	In-house technician	App

Contractors	A contractor's office staff hold **Back office** in the contractor's account. They receive requests for proposal and bid. A contractor's technicians hold **Field tech**. They read the asset brain of the assets in a request for proposal or a work order and carry out guided jobs. Both see only the assets of the work routed to them, or of a per-contract grant.	Contractor's office staff, contractor's technician	App, for contractors' technicians

> NOTE
> In a smaller operation, the facility manager may also hold the **Admin** role, to invite users and grant access to assets.

B

APPENDIX B

Settings reference

The tables below list the settings described in this guide and in the *Zylergy Facilities Operator Guide*, and who changes them. Table B-4 gives the defaults of organization settings.

Table B-1 Personal settings in the app

SETTING	WHAT IT DOES
Glove	Larger controls for gloved hands
Text LG	Larger text
Contrast	Higher contrast for glare and low light
Dark, **Daylight**, **Baseline**, **Auto**	Color scheme. **Auto** follows the ambient light.
Read QR / barcode first	Looks for a QR tag or barcode before identifying the asset from what the camera sees
Notifications	Push notifications when something needs you, a daily digest and its time, and quiet hours
Units and formats	Units and date format, such as °F, PSI and MM/DD/YYYY

Table B-2 Personal settings in the web console

SETTING	WHAT IT DOES
Appearance	The console's color scheme
Density	How tightly tables and queues are spaced
Landing page	The page the console opens on
Email notifications	Email when something needs you, and a daily summary

Table B-3 Organization and operational settings

SETTING	WHERE DESCRIBED	WHO
Organization name and billing contact	Chapter 2	Administrator
Single sign-on and identity provider	Chapter 2	Administrator
Users, roles and asset access	Chapter 3	Administrator
Sites, locations and portfolios	Chapter 2	Facility manager, portfolio administrator
Asset records and QR tags	Chapter 4	Facility manager
Manuals	Chapter 4	Facility manager
PM intervals	Chapter 5	Facility manager
Obligations, governing authorities and required credentials	Chapter 5	Facility manager
Warranty events	Chapter 5	Facility manager
Credentials on file	Chapter 5	Facility manager
Known contractors and service agreements	Chapter 6	Facility manager
Marketplace policy and qualification	Chapter 6	Portfolio administrator
CMMS mode and connections	Chapter 7	Administrator
Building system connections	Chapter 7	Administrator
Distributor account for parts handoff	Chapter 7	Administrator
Scheduled attestations	Chapter 9	Compliance officer
Automated audit exports	Chapter 9	Compliance officer
Consent to support sessions	Chapter 11	Administrator

Table B-4 Defaults of organization settings

SETTING	DEFAULT
Manuals	Private to your organization
PM intervals	Seeded from the manufacturer’s documentation
CMMS mode	Standalone until a CMMS is connected
Building system connections	None
Distributor account for parts handoff	None
Scheduled attestations	None
Automated audit exports	None
Consent to support sessions	Not given

Glossary

acceptance range

The range a measured reading must fall within to count as in spec, for example `110–130 PSI`. Each range comes from the manufacturer's documentation.

access grant

Permission for a technician or subcontractor to work on equipment, given per asset, per group of equipment or per service contract. People see exactly the equipment they are granted.

administrator

The person who manages users, sign-in, settings, integrations and support access, and reviews documents uploaded to the company's library. The matching role is **Admin**. In a small company the shop owner may also be the administrator.

append-only

A record that can be added to but never edited or deleted. A correction is written as a new entry linked to the original.

ASME A17.1

The safety code for elevators and escalators. Zylergy Facilities tracks elevator safety inspections as obligations governed by ASME A17.1.

asset

A serviceable piece of equipment in a building, such as a rooftop unit, chiller, air handler, elevator or fire pump, registered in Zylergy Facilities.

asset brain

Everything Zylergy Facilities knows about one asset in one place: identity and specifications, manuals, purchase invoice, maintenance log and compliance status. You open it by scanning the asset's QR tag.

asset class

A kind of asset, such as rooftop unit, chiller, elevator or fire pump, that shares specification fields and manufacturer intervals.

asset record

The registry entry for one piece of equipment: make, model, serial number, location, who owns it, specifications and history. In Zylergy Facilities the asset brain is built on the asset record.

attestation

A scheduled statement of an operation's compliance status, produced from the compliance record for a building owner or an authority.

audit pack

A PDF that Zylergy Facilities exports for an asset or a site. It shows obligations against completed work, who did the work and with what credential, the proof captured, the routing rationale and the verification trail.

award

The facility manager's choice of the bid that wins a marketplace work order. The awarded contractor gains access to the asset.

back office

The people who work in the web console: planning, dispatch, quotes, customers, supervision and reports. The matching role is **Back office**. In Zylergy Field this is the shop owner and any office staff. In Zylergy Facilities it is facility managers, dispatchers and compliance staff. In Zylergy Solar it is sales and service coordination.

bid

A contractor's offer to carry out a work order published to the marketplace.

bill of materials

The list of parts and quantities a repair needs. In Zylergy Solar it is part of the repair package.

building management system (BMS)

An existing building system that monitors equipment and can supply condition data.

building selector

The control at the right of the web console header that shows and changes the building you are working in.

cadence learning

The refinement of preventive maintenance intervals from verified outcomes. Each change is recorded, attributable and reversible, and is shared across organizations only under data-use authorization.

CMMS

Computerized maintenance management system: the system of record many facility teams already use for assets and work orders.

CMMS overlay

The Zylergy Facilities mode in which assets, schedules and work orders are read from your existing CMMS and completed work and compliance entries are written back to it.

Company Brain

Your organization's governed knowledge in Zylergy: the manuals, records, notes and photos the product draws on, with access set by your administrator. Each product presents it where you work: the document library in Zylergy Field, the asset brain in Zylergy Facilities, and the manuals and history on the asset record in Zylergy Solar.

compliance entry

The record Zylergy Facilities writes automatically when a job closes: who did the work and with what credential, when, what was done, and the proof.

compliance officer

The person who owns regulatory packs and attestations across a portfolio. Works in the web console with the **Back office** role.

compliance record

All compliance entries for an asset or a site, shown on the **Compliance** tab of the web console. It is append-only.

condition-based trigger

Maintenance raised by the condition a connected unit or an existing building system reports, rather than by a fixed interval.

contractor

An outside company, such as an elevator or mechanical service firm, that carries out work routed to it under a service agreement, with access limited to the assets it is authorized for.

contractor's technician

A technician employed by a contractor who carries out the contractor's work in the Zylergy Facilities app.

credential

A certification a person must hold to perform regulated work, such as a QEI elevator inspector credential or EPA 608 certification. Zylergy Facilities uses credentials on file to decide who can be assigned a job.

credential vault

Encrypted storage for passwords and access tokens that connect Zylergy to other systems. Stored secrets are never shown to users.

data-use authorization

Your organization's permission for the outcomes of its work to improve the product for other customers, with auditable lineage.

dispatcher

The person who schedules and routes work.

EPA 608

The US Environmental Protection Agency certification required to handle refrigerants under Section 608 of the Clean Air Act.

facility manager

The person who runs maintenance and compliance for a building or portfolio, walking the building with the app and working in the web console.

governing authority

The code, standard or regulation an obligation comes from, such as ASME A17.1 or NFPA 25.

guided checklist

The step-by-step checklist a technician follows on the Zylergy Facilities app, with links to the manual pages for each step and the proof the step requires.

in-house technician

A technician employed by the facility operator, as opposed to a contractor's technician.

integration credentials

Passwords and access tokens that connect a Zylergy product to another system, kept in the credential vault.

learning loop

The use of verified outcomes to refine procedures, task packages, intervals and the asset knowledge.

manufacturer's documentation

Installation, operation, service and parts documents published by the equipment manufacturer.

marketplace

The Zylergy Facilities function through which qualified contractors receive requests for proposal, submit bids and are awarded work.

nameplate

The plate or label on equipment that carries its make, model, serial number and ratings.

NFPA 25

The standard for inspection, testing and maintenance of water-based fire protection systems. Zylergy Facilities tracks fire pump certification under it.

NFPA 80

The standard for fire doors and other opening protectives; Zylergy Facilities tracks fire damper inspections under it.

obligation

A maintenance, inspection, compliance or warranty requirement on an asset, with a due date and a governing authority. Obligations feed the work queue.

offline

Working without a network connection. Work you record offline is saved on the device and synchronized when the connection returns.

PM interval

The interval at which preventive maintenance falls due for an asset, seeded from the manufacturer's documentation and editable.

point-and-identify

Identifying an asset by pointing the camera at it instead of scanning its QR tag. Zylergy Facilities asks you to confirm when the match is uncertain.

portfolio administrator

The person who sets cross-site compliance, routing and marketplace policy for a portfolio of sites. Works with the **Back office** role.

preventive maintenance (PM)

Scheduled maintenance carried out at set intervals to keep equipment in service, such as a quarterly PM.

proof

The photos and readings a technician must capture before a Zylergy Facilities job can be completed.

QEI

Qualified Elevator Inspector: the credential required to perform certified elevator inspections.

QR tag

A label with a QR code bound to one asset record. Scanning it opens that asset.

qualification

The check that a contractor holds the required credentials before it may bid on marketplace work.

quality score

The automatic score given to a completed job from its proof and how it was carried out, recorded with the job.

reading

A measured value recorded for a checklist item, such as suction pressure, checked against its acceptance range as you enter it.

regulatory pack

A compliance pack assembled for a regulation or authority across sites, as distinct from the audit pack for one asset or site.

request for proposal (RFP)

A work order offered to contractors to accept or bid on: to one known contractor (RFP handoff) or to qualified contractors through the marketplace.

RFP handoff

Sending a work order to one known contractor as a request for proposal.

role

What a user can do in Zylergy: **Admin**, **Back office**, **Field tech** or **Customer**, given per user by the administrator. A user can hold more than one role.

routing

Assigning a work order to an in-house technician or a contractor. Zylergy Facilities blocks assignments that would give certified work to someone without the required credential.

routing rationale

The recorded reason for a routing decision. It is written to the compliance record and appears in the audit pack.

scoped access

Access limited to exactly the assets a person or contractor is authorized for.

service agreement

A contract between the operator and a contractor, recorded with the contractor, that covers certain assets or sites.

shadow copy

The complete copy of assets and records that Zylergy Facilities keeps in both CMMS overlay and standalone modes. In overlay mode, the CMMS wins when the two disagree on asset data.

site

A location that groups assets: a building or campus in Zylergy Facilities, a homeowner's property in Zylergy Solar.

standalone mode

The Zylergy Facilities mode in which Zylergy Facilities is your system of record and no CMMS is connected.

sync

The transfer of changes between your device and Zylergy when a connection is available.

task package

The scope, checklist and manual pages that Zylergy Facilities generates from the asset brain for a work order, so the person doing the work has what they need.

technician

A person who works at the equipment with the app. The matching role is **Field tech**.

verification gate

The check that keeps a job from being completed until its proof has been captured.

verification trail

The sequence of proof and approvals behind a completed job, as shown in the audit pack.

walk-through

The facility manager's round of the building with the app on iPad or iPhone, scanning assets and reviewing what is due at each one.

web console

The browser-based part of a Zylergy product, used by the back office instead of the app.

work order

An assignment of work on an asset or site to a technician or contractor.

work queue

The list of work that needs attention, sorted so the most urgent comes first: in Zylergy Facilities, obligations and due work; in Zylergy Field, approvals, reviews, exceptions and overdue maintenance.

Index

A

access
  to assets 12
access control 41
administrator 2
  role 52
append-only 41
ASME A17.1 26
asset classes 17
asset record 17
asset registry 16
attestations
  scheduling 44
audit
  access 45
  manual access 21
  permission grants 14
  preparing for 46
  what is recorded 44
audit pack 44
  automated exports 45

B

baseline 28
bill of materials 38
billing 47
  contact 47
building systems 37
buildings 8
bulk provisioning 19

C

cadence learning 25
CMMS
  planning 35
  reconciliation 19
  write-back 45
CMMS overlay 35
  tasks 36
Company Brain 16
compliance officer 11
condition-based trigger 37
conflicts 19
contractors 30
  access 13, 52
  adding 31
  service levels 33
Corrigo 36
credential vault 38
credentials 29

D

data use 41
defaults 54
dispatcher 11
disputes 32
documents 20

E

encryption 40
EPA 608 26

F

facility manager
  role 52
  setup responsibilities 2
Fiix 36

G

glove mode 54
go-live checks 4
governing authority 26

H

history
  support actions 50

I

IBM Maximo 36
integration credentials 38
integrations 34
intervals
  seeded from manuals 24
invitation 12
  resending 50
invoices 47

L

learning loop 20
  authorization 41
least privilege 41
licensed content 20
locations 8
  adding 9

M

manuals 20
marketplace 32
  integrity 33
  policy 32

N

nameplate
  capture 18
NFPA 25 26
NFPA 80 26

O

obligations
  example 26
offline
  data on devices 42
onboarding
  assets 19
  order 3
Operator Guide 4
organization 6

P

parts
  handoff 38
  not resold 47
payment methods 47
permission grants
  audit 14
permissions 12
  typical set-ups 13
PM intervals 24
portfolio administrator 9, 32
portfolios 9

Q

QEI 26
QR tag 18
qualification 32

R

ratings 32
regulatory pack 44
retention 41
RFP handoff 31
roles 11
  administration 2
  changing 14
  reference 52
routing
  guidance 31

S

scoped access 13
security
  your organization's part 42
service agreements 31
service contracts 28
settings
  app 54
  organization 54
  reference 53
  web console 54
  where they live 5
setup checklist 3
sign-in
  settings 7
single sign-on 7
sites 8
  adding 8
standalone mode 35
  tasks 36
subscription 47
support access 48
  act-as 48
  consent 49
  contacting support 49
  view-as 48

T

tamper-evident record 41
technicians
  role 52
tenant isolation 6, 40
triggers 24
troubleshooting
  access 15
  integrations 39

U

UpKeep 36
users
  inviting 12
  removing 14

W

warranty 28
work queue
  sources 24

Z

Zylergy support 50