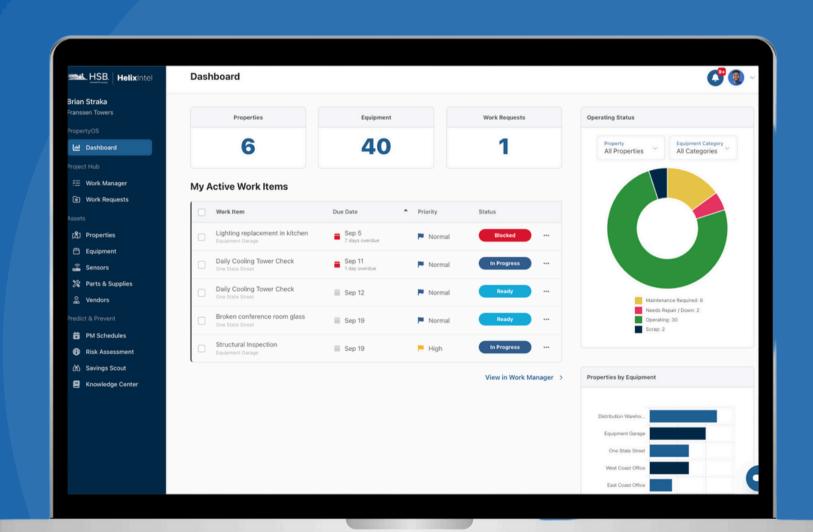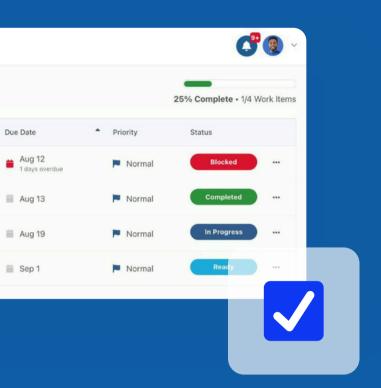# Quick Start Guide

Getting Started with HelixIntel
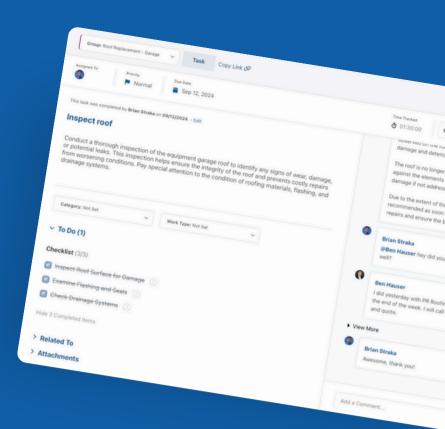
Maintenance is hard.
HelixIntel is here to make it easier.

Dive into the tools that will help you streamline daily operations and boost productivity. Whether you're just getting started or need a quick refresh, this guide will walk you through everything you need to hit the ground running and keep your workflow smooth and efficient.
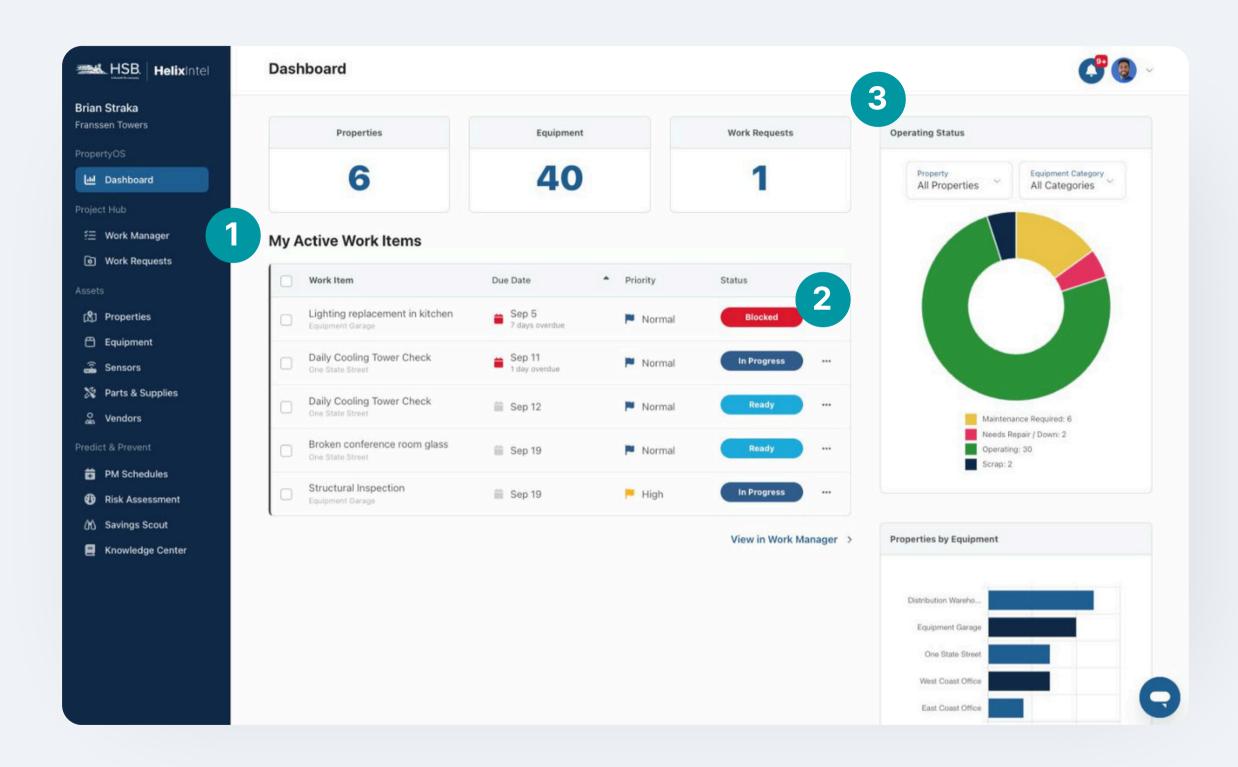
Content

1. Dashboard

Start Your Day Here

The Dashboard is your daily launchpad. Get a snapshot of everything that's happening across your operations. From here, you can:

(1) View Active Work Items: See what's in progress, pending approval, or overdue.

(2) Quickly Access Key Areas: Jump straight into tasks that need your attention.

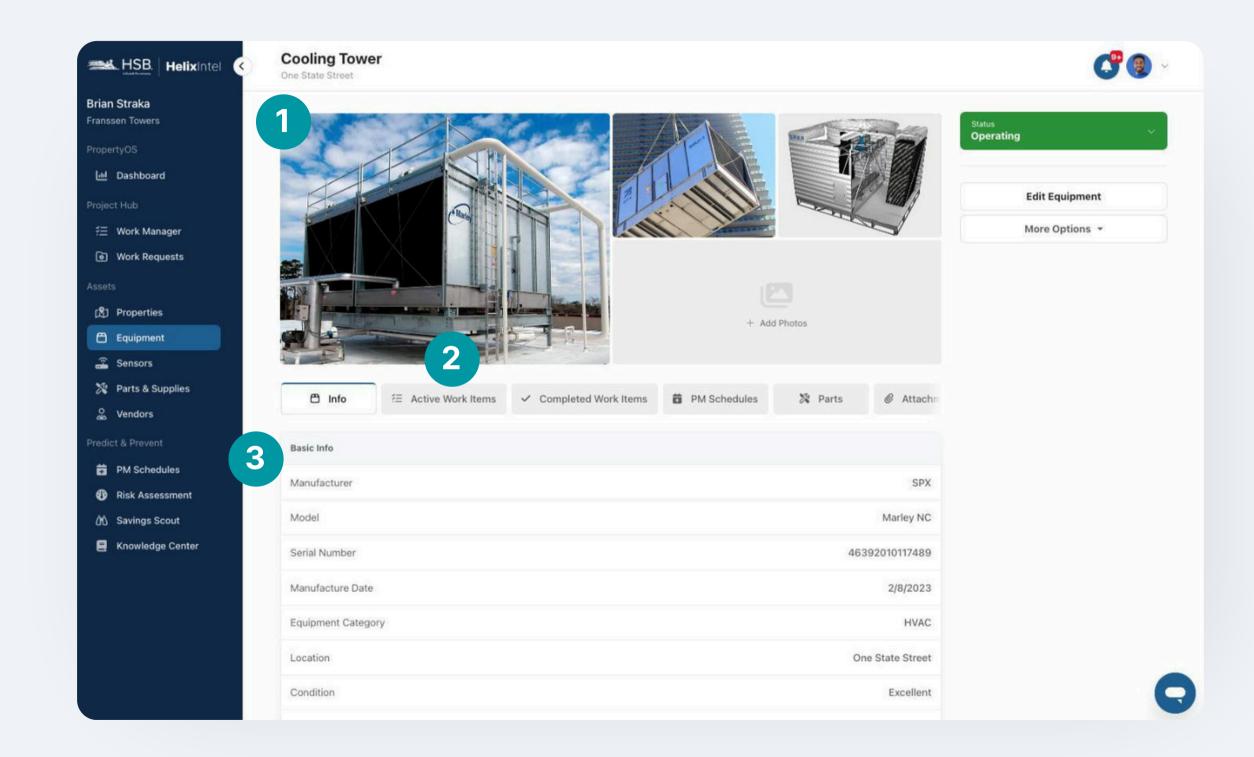**(3) Monitor Performance:** Track key metrics to stay on top of your team's efficiency.

2. Assets

Log Your Key Details

Keep your property and equipment information organized in the Assets section. This will help you:

1 **Centralize Information:** Store critical details about each asset in one place.

2 **Enhance Workflows:** Relate assets to relevant work orders for seamless tracking and reporting.

3 **Improve Maintenance:** Use asset details to inform preventive maintenance schedules.

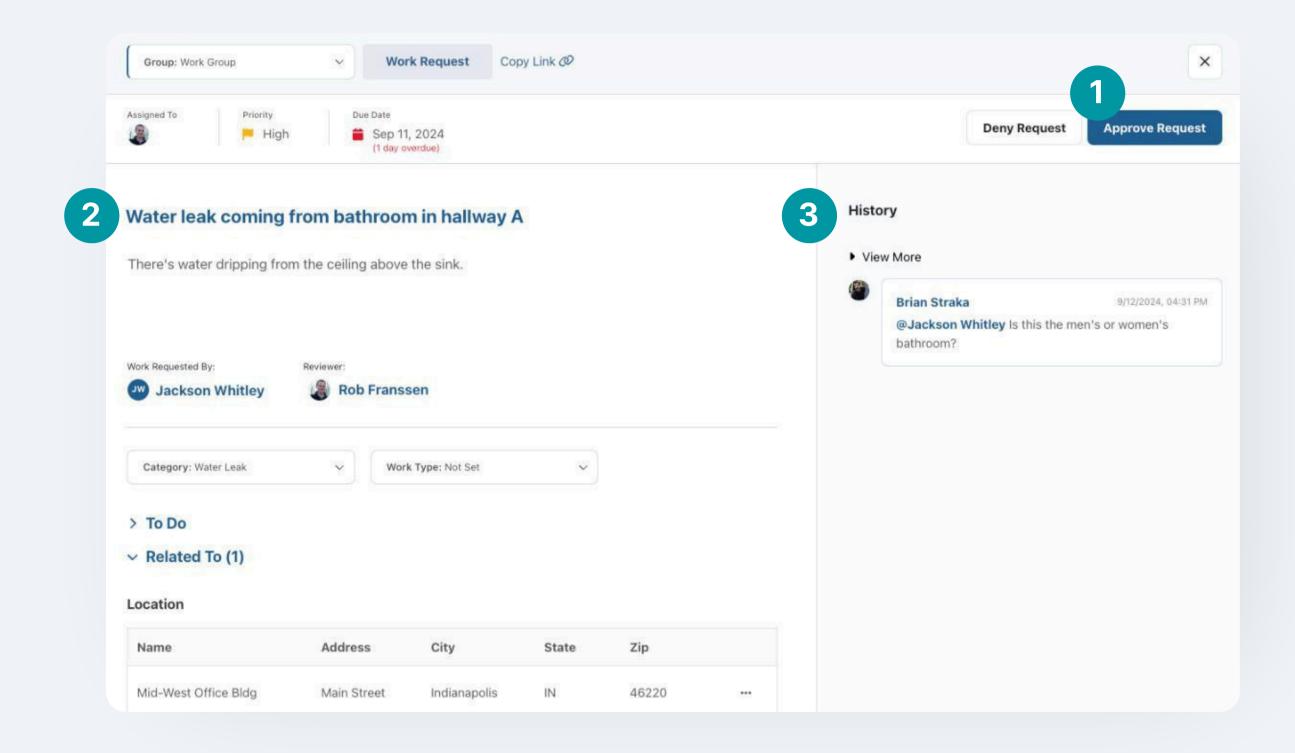**Tip:** Regularly update asset information to ensure accurate maintenance records.

3. Work Requests

Review and Act

Work Requests is where you manage incoming requests. Here, you can:

1 Approve or Decline Requests: Quickly decide which requests should move forward.

2 Adjust Request Details: Modify due dates, priority levels, or add notes.

3 Communicate with Requesters: Leave comments or ask for additional information if needed.
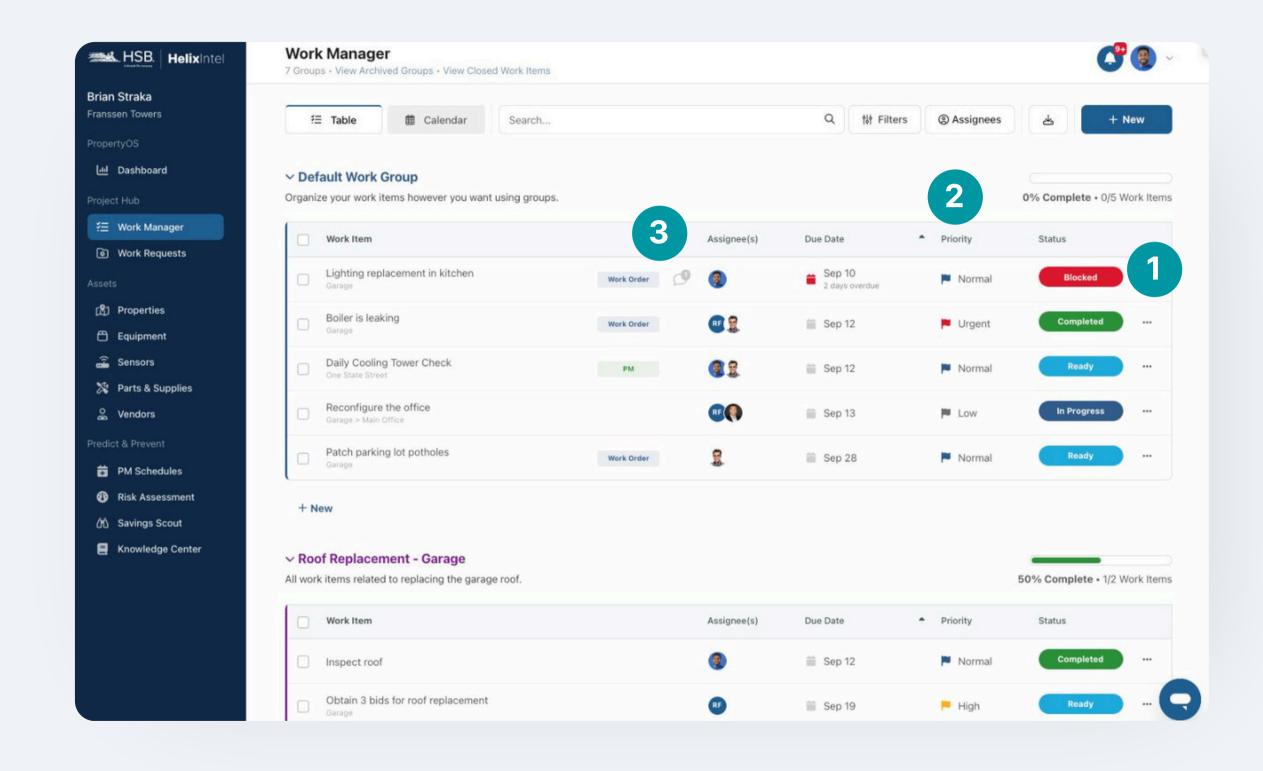
4. Work Manager

Handle Everything from Here

The Work Manager is your command center for all tasks. Use it to:

1 **Track Your Work:** See what's ready to be worked on, in progress, completed, or blocked.

2 **Prioritize Work:** Assign priority levels to ensure critical tasks are handled first.

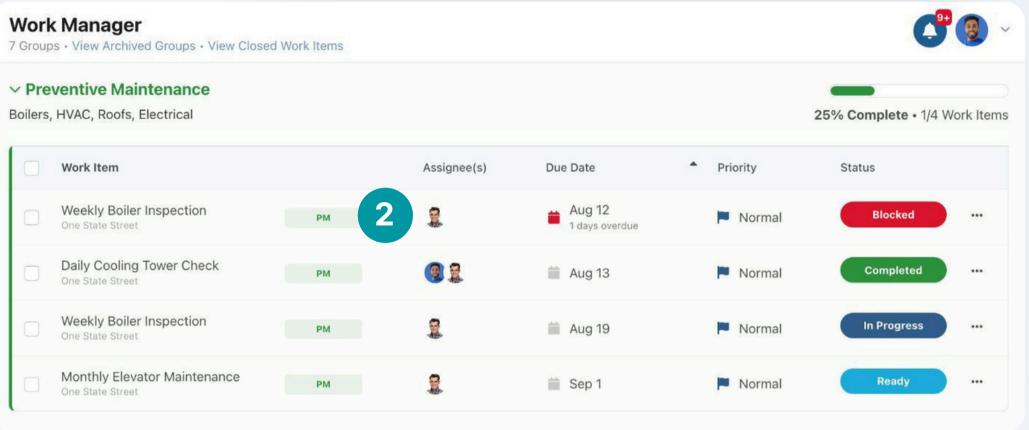**3** **Collaborate with Your Team:** Add comments and notes to keep everyone in the loop.
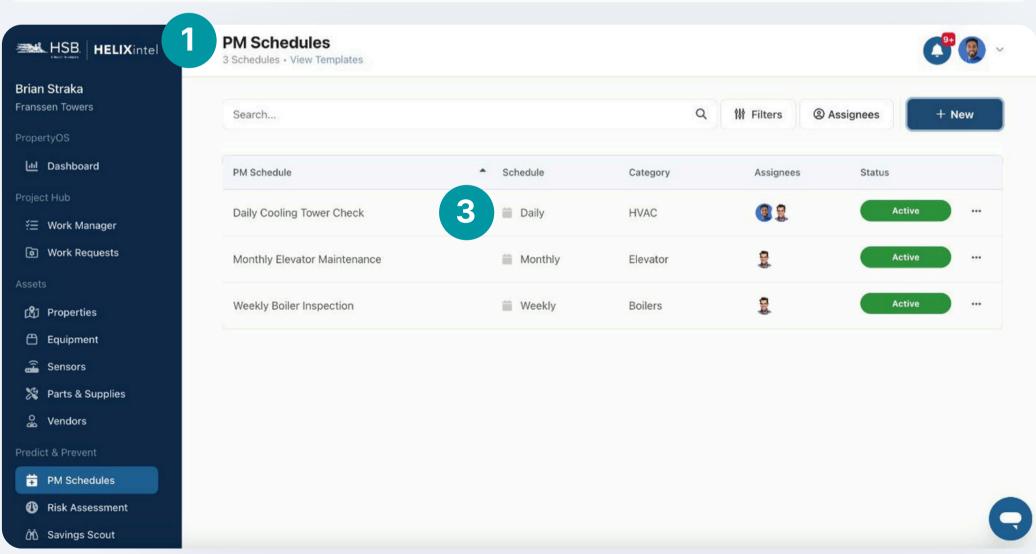
5. Preventive Maintenance Schedules

Automate Your Preventive Efforts

Preventive Maintenance (PM) Schedules help you stay proactive. With this tool, you can:

1 **Reduce Manual Work:** Create schedules that automatically generate and assign PM work orders at regular intervals.

2 **Save Time:** Spend less time manually creating and assigning work.

3 **Stay Ahead on Maintenance:** Keep your equipment running smoothly with timely upkeep.

Tip: Review your schedules periodically to adjust for any changes in asset usage.
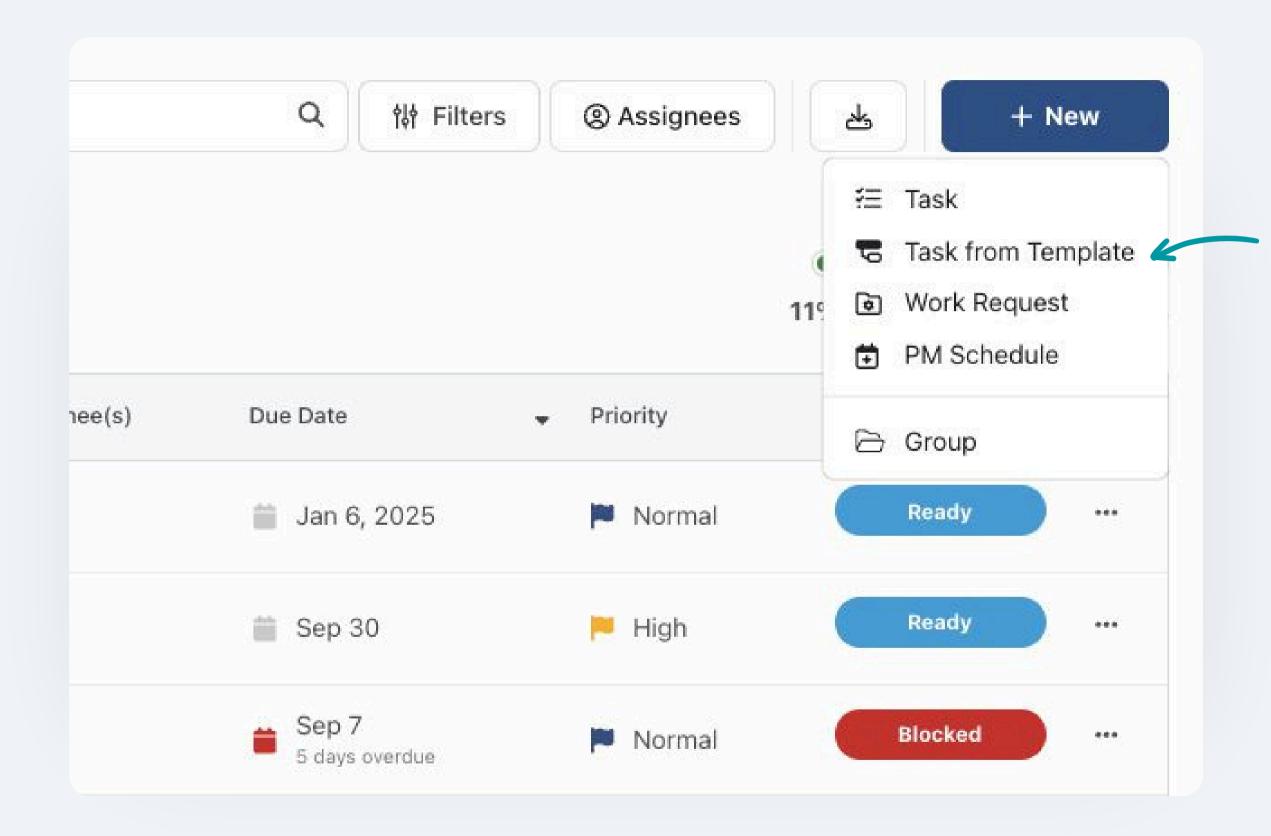
6. Templates

Standardize Your Tasks

Templates help you maintain consistency across your operations. They allow you to:

1 **Create Standardized Tasks:** Build templates for common tasks to save time.

2 **Ensure Uniformity:** Apply the same standards across different teams or locations.

3 **Streamline Workflows:** Simplify the task creation process for routine operations.
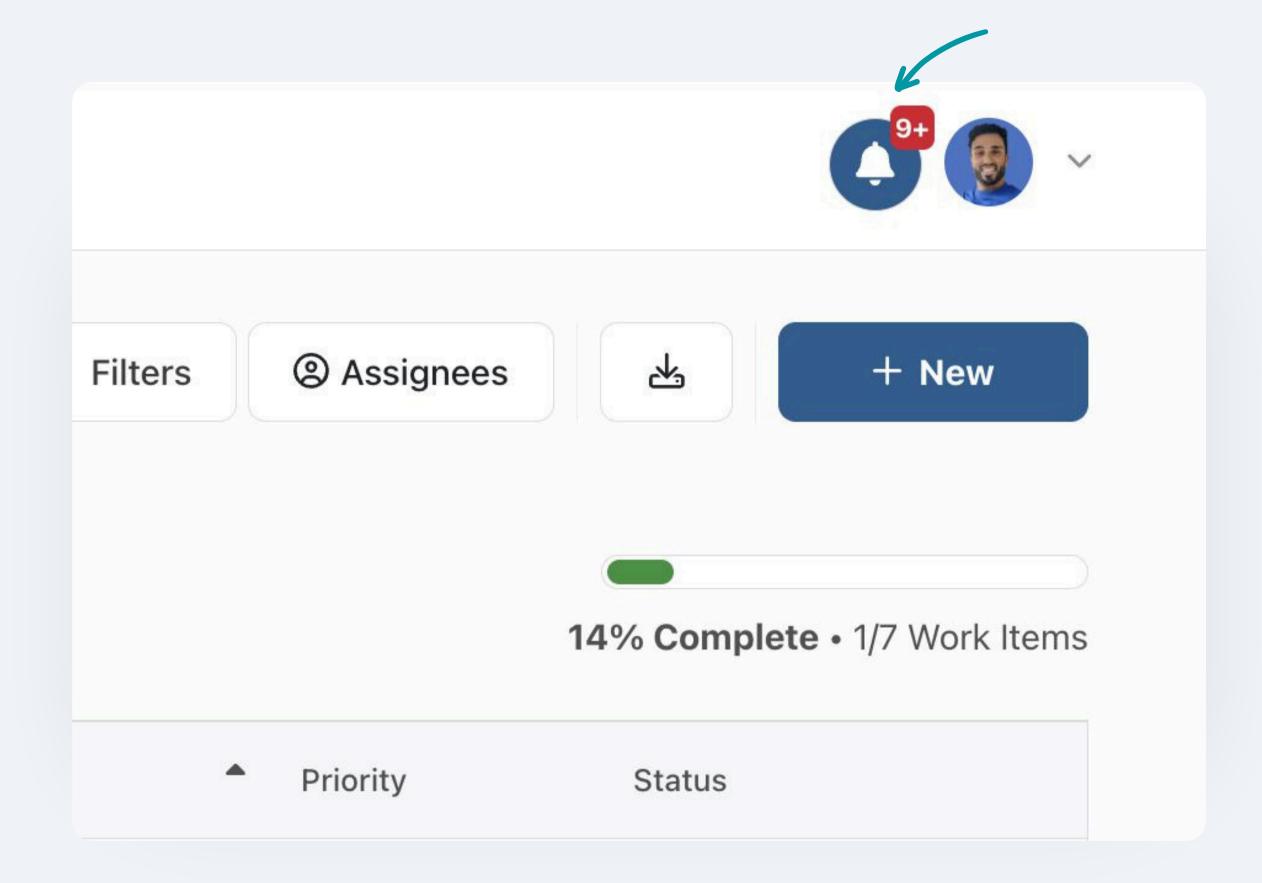
7. Notifications

Never Miss an Update

Notifications keep you informed about what matters most. You can:

1 **Choose Your Channels:** Select how you want to receive alerts – in-app, email, SMS, or mobile.

2 **Customize Alerts:** Set preferences for the types of notifications you receive.

Need Help?

If you have questions or need further assistance, use the in-app chat support or reach out to your Account Manager.

www.helixintel.com