

WORK ORDERS & USER INTERFACES

Glossary of Terms:

ASP
Application Service Provider -- A company that allows you to work on your system via the internet, thus eliminating the need to buy and install software.

Client/Server
Type of software installed on an office network and shared by multiple users.

CMMS
Computerized Maintenance Management System -- A software system for managing maintenance and work order activities.

PDA
Personal Digital Assistant -- handheld devices.

INTRODUCTION

Let's say you're looking at systems to manage work orders, service requests, and maintenance work. Should you go with a web-enabled system? Subscribe to a web-based ASP? Buy a networked client-server application? What's the best way to compare and evaluate different products in the marketplace when they come on such a wide variety of platforms?

Facility Wizards has solved this problem many times for many clients. This document will simplify the complex choices faced by those considering how to improve the flow of their work order process.

THE USERS

Throughout our software success stories, it has become clear with each maintenance/CMMS system that there are 3 distinct types of users, some of whom work in the Facilities department and many who do not. Each of these groups has a very different set of software needs throughout the work order process, so there's no reason to buy the same interface for everyone. They are:

1) Requesters -- people who request work orders and need to know the status of the work being done. Requesters can be anyone in the organization from assistants to executives.

2) Workers -- those who actually do the work. Workers can be in-house trades or technicians, or outside vendors and subcontractors.

3) Administrators -- individuals who field work requests, set up and manage the preventive maintenance program, and assign work orders to workers. These people are the "gatekeepers" of the maintenance team, responsible for communicating the status of work to requesters and the preparation of periodic reports of work activities to managers and executives.

Facility Wizard Software's Workorderama and its available integrated modular technologies have been developed and individualized to respond to the specific needs of these 3 groups.

Workorderama™

**WORK ORDER
MANAGEMENT
SOFTWARE**



FACILITY
WIZARD
SOFTWARE

WORK ORDERS & USER INTERFACES

ADMINISTRATORS

Workorderama Administrator Interface - Software or Web-based

FileMaker Pro - [Wkordpm.fp5]

Facility Wizards

Workorderama PM
MAINTENANCE MANAGEMENT

Order #	Start	Job Type	Order By	Pri	Assigned To	Building	Floor	Complete
99139	01/25/02	Keys / Locks	Chluda, Julie	2	Bill Hammer	100 Park	1950	
99136	01/20/02	Plumbing	Betancourt, Jeannie	2	Bill Hammer	100 Park	1350	
PM 99135	12/16/01	Fire Ext Check	Zurer, Seth F.	2	Terry Porter	300 Park	240	
PM 99120	12/16/01	Electrical	Adams, Julie	2	Willma Peterson	200 Central	120	
PM 99114	12/01/01	PM	Patel, Ami	1	Tara Ross	100 Park	1050	
PM 99112	10/30/01	Carpentry	Bayer, Brian	2	Engineers	300 Park	360	
PM 99107	11/27/01	Cabling / Telecom	Steer, Kristen	2	Engineers	100 Park	1600	
PM 99104	10/24/01	Electrical	Davis, Christi	2	Engineers	100 Park	500	
PM 99099	12/19/01	PM	Adams, Julie	Ami Patel	200 Central	120		
PM 99098		Cabling / Telecom	Oblaya, Chudi	2	Ami Patel	100 Park	1000	
PM 99097	12/18/01	Miscellaneous	Oblaya, Chudi	2	Ami Patel	200 Central	1650	
PM 99085	10/23/01	Cabling / Telecom	Holub, Andy	2	Ami Patel	300 Park	420	
PM 99079	01/30/02	Cleaning	Betancourt, Jeannie	2	Bill Hammer	100 Park	1350	
PM 99078	12/14/01	Miscellaneous	Oblaya, Chudi	2	Blaine Frost	200 Central	1650	
PM 99076	12/19/01	Cabling / Telecom	Bayer, Brian	2	Terry Porter	300 Park	360	
PM 99075	12/16/01	Cleaning	Betancourt, Jeannie	2	Toni Mandry	100 Park	1350	
PM 99069	02/05/02	Painting	Chluda, Julie	2	Bill Hammer	200 Central	1950	
PM 99067	11/23/01	Keys / Locks	Adams, Julie	2	Robert Fisher	200 Central	120	

Find ... All Orders Still Open Complete By Day ... By Week ... By Month ... By Year ...

Browse For Help, press F1 Start FileMaker Pro - [Wko... 12:20 PM

FileMaker Pro - [Wkordpm.fp5]

Facility Wizards

WORK ORDER INFO

from PM10017

Order #	99055		
Entry Date	10/24/01	Time	5:25 PM
Order By	Patel, Ami		
Dept	Facilities		
Phone	7351		

Description of Work

Inspect and Test UPS / Battery Backup system

Job Type	Lights
Assgn To	Serge Voltaggio CLUNE
Priority	① ② ③
Building	100 Park
Floor	1050
Item ID#	10107
Item/Equip	Cooling Tower 3
Checklist	Battery Backup Testing

Time / \$

Back to List Reports ... Exit

New Order Print Order Help

Time / \$ List E-Mail Notes

Job Start Date Thursday 11/01/01 Time Time Hold

Target / Due Date Time Time Complete

Completion Date Time

Duration 0.0 Days

Labor - Name / Trade Date Hours Rate \$ Amount

Serge Voltaggio 12/01/02 5.00 \$ 35.00 \$ 175.00

Scott Wells 01/01/02 5.00 \$ 35.50 \$ 177.50

New Labor Entry ... Total Labor \$ 352.50

Part Name Part ID Qty Units Unit \$ \$ Amount

Fuse 2414 5 box \$ 2.31 \$ 11.55

New Parts Entry ... Update Inventory ... Total Materials \$ 11.55

Total Order Cost estimate actual \$ 364.05

Bill to: Project pjt001 Amount \$ 364.05

Find ... Make PM Delete Staff Items Vendors Workers Lists

Browse For Help, press F1 Start FileMaker Pro - [Wko... 12:21 PM

Top: The list view of work orders

Bottom: The detail screen with time and materials information

Workorderama is our award-winning application (a program that is installed on your server and PCs) that is ideal for the needs of the Administrators group. It is a powerful and simple-to-use tool for the management and administration of work orders and maintenance tasks.

With 1 or 2 mouse clicks, you can see the answer to "how many work orders are open?", or "when was that job completed?", or "show me all of last week's work orders".

Within seconds, you can run professional reports detailing many aspects of work order activities, such as cost and time analysis, monthly summaries by job type, and bar charts. Many of the features found in Workorderama are almost impossible to develop in a standard ASP-type system.

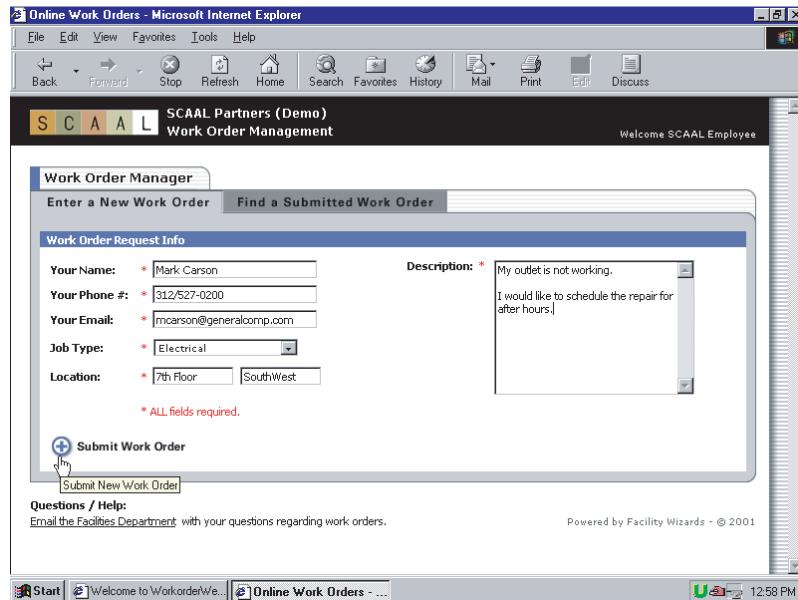
Administrators typically need the power, reporting tools, and flexibility of the Workorderama application. The other 2 types of users, Requesters and Workers, have smaller, more targeted sets of needs that are much different than those found in the full-featured program.

WORK ORDERS & USER INTERFACES

Our Web Access technologies include 2 modules that are custom-tailored for the needs of Requesters and Workers. Not surprisingly, we call them the Requester Interface and the Worker Interface. Here's how they work:

REQUESTERS

The Web-Based Requester Interface



Online Work Orders - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss

SCAAL Partners (Demo) Work Order Management

Welcome SCAAL Employee

Work Order Manager

Enter a New Work Order Find a Submitted Work Order

Work Order Request Info

Your Name: * Mark Carson

Your Phone #: * 312/527-0200

Your Email: * mcarson@generalcomp.com

Job Type: * Electrical

Location: * 7th Floor SouthWest

Description: * My outlet is not working. I would like to schedule the repair for after hours.

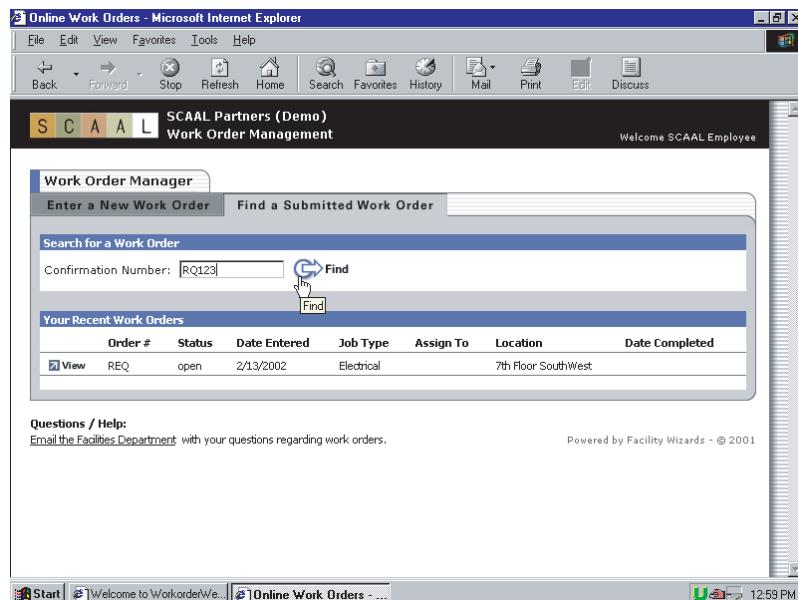
* ALL fields required.

Submit Work Order

Submit New Work Order

Questions / Help: Email the Facilities Department with your questions regarding work orders.

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Online Work Orders - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss

SCAAL Partners (Demo) Work Order Management

Welcome SCAAL Employee

Work Order Manager

Enter a New Work Order Find a Submitted Work Order

Search for a Work Order

Confirmation Number: RQ123

Find

Find

Your Recent Work Orders

Order #	Status	Date Entered	Job Type	Assign To	Location	Date Completed
REQ	open	2/13/2002	Electrical		7th Floor SouthWest	

Questions / Help: Email the Facilities Department with your questions regarding work orders.

Powered by Facility Wizards - © 2001

Top: The Requester's work order entry form

Bottom: Requesters can see a list of their work orders or search for others by confirmation number

Requesters can be anyone in your company. They may be really smart individuals, or they might not be the sharpest pencil in the box. They should have a tool for submitting work requests that is easier than picking up the phone. The tool should not require any training or explanation. It should be obvious and simply intuitive for Requesters to (1) click on a link (or 'Favorite') in their web browser; (2) type in a few words describing their request; and (3) click a button to submit the order. Facility Wizards' Requester Interface is exactly that. 1-2-3.

Once the work request has been submitted, the Requester receives a tracking number that gives them 24x7 access to the current status of the job. In addition, Facility Wizard Software enables the system to automatically send custom-tailored emails at various stages of the work process. Typically, the Requester gets email notification of (1) receipt of the request; (2) generation of a Work Order number and assignment to a worker; and (3) order completion.

The bottom line is that well-designed technology can dramatically increase the level of communication and service you provide to your end-users.

WORK ORDERS & USER INTERFACES

WORKERS

The Worker Interface - Web-Based or Mobile Device

Let's face it. Workers hate paperwork. After their morning cup of coffee, they want to focus on getting things done. They want to know what jobs are assigned to them and when they're finished, they want to move on to the next one. The Administrators want to know 3 things: (1) when was the work done; (2) how many hours were put in, and (3) what parts and supplies were used.



A screenshot of a Windows Internet Explorer browser window. The title bar says 'WKO_WORKORDERS_v6 - Windows Internet Explorer'. The address bar shows the URL 'http://164.1.127.246/fmi/lwp/cgi?db=WKO_DASHBOARD_v6-loadframes'. The main content area displays a 'Facility Wizards WORK ORDER INFO' page. It shows a 'Property' section with 'Order # 10838', 'Entry Date 03/20/07', 'Entry By Bolger, Katie', 'Dept Facilities', 'Phone 973-179-8738', 'Loc 1 Center1', 'Loc 2 120', and 'Location Description 100-Northwest'. Below this is a 'Description of Work' section with 'Semi-annual UPS inspection'. On the right, there are three tabs: 'Time / \$', 'Checklist', and 'Notes'. The 'Time / \$' tab is active, showing a table for 'Bill Hammer' with a total of \$88.00. Below this are sections for 'New LABOR Entry' and 'New PARTS Entry', both with a total of \$4.70. At the bottom right, there are buttons for 'Total Parts \$ 4.70', 'Refresh', and '\$ 92.70'.

Worker-Interfaces shown above allow entering, viewing, & completing work orders, as well as adding notes, time & materials

Top: Symbol© PocketPC© (left) and BlackBerry© (right) mobile Worker Interfaces

Bottom: Browser-based worker interface

Workorderama facilitates the traditional process of printed work orders which go from outbox to inbox. Facility Wizards' Worker Interface streamlines the process with more simple technologies that can eliminate paperwork and speed up communication within the facilities/maintenance team. The Worker Interface lets the Workers immediately see (and print out if necessary) open work orders assigned to them. Many times, closing a work order is one click away. When there are hours and supplies to track, they just enter them on the screen and the database is immediately updated.

The Worker Interface can be seen from any web browser, but we realize that if these guys are doing their job, they are on the move, in the shop, in a truck, on the roof, or somewhere actually doing the work, and not near a PC. That's why we've developed the Worker Interface for mobile devices. From anywhere workers can check assignments, enter hours, and close out orders with a few taps on their PDA screen. It takes about 15 minutes to learn, and from then on, about one minute to check on or close out each task, while instantly updating the Workorderama database for the Administrators.

SUMMARY

The most important thing that we've learned is that there are some interfaces that work well on the web, some that work better on a mobile device, and some things that need more full-featured functionality. The Workorderama suite of products developed by Facility Wizard Software are all about doing it the right way. Putting the right tools in the right places for the right people at the right time (and at the right price).



Workorderama™
Asset Maintenance + Work Order Tracking



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SYSTEM REQUIREMENTS



WINDOWS
Windows 2000 and XP
Windows Server 2000 or 2003