

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 -- hand-held 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.

WORK ORDERS & USER INTERFACES

ADMINISTRATORS

Workorderama Administrator Interface - Software or Web-based

The screenshot displays the Workorderama Administrator Interface in FileMaker Pro. The main window shows a list of work orders with columns for Order #, Start, Job Type, Order By, Pri, Assigned To, Building, Floor, and Complete. The list includes various job types such as Keys / Locks, Plumbing, Fire Ext Check, Electrical, PM, Carpentry, Cabling / Telecom, and Miscellaneous. The interface also features a menu bar with options like New Order, PM Orders, Reports, Menu, Print Batch, Print List, and Help. A search bar and sorting options are visible at the bottom of the list.

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

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".

The screenshot displays the Workorderama Administrator Interface in FileMaker Pro, showing a detailed view of a work order. The main window is titled "WORK ORDER INFO" and contains various fields and tables. The "Order # 99055" is highlighted. The "Description of Work" field contains "Inspect and Test UPS / Battery Backup system". The "Job Type" is "Lights". The "Assign To" field is "Serge Voltaggio". The "Priority" is "1". The "Building" is "100 Park" and the "Floor" is "1050". The "Item ID#" is "10107" and the "Item/Equip" is "Cooling Tower 3". The "Checklist" is "Battery Backup Testing". The "Time / \$" table shows labor entries for Serge Voltaggio and Scott Wells. The "Part Name" table shows a Fuse entry. The "Total Order Cost" is \$364.05.

Order #	Entry Date	Time
99055	10/24/01	5:25 PM

Job Start Date	Target / Due Date	Completion Date	Duration
Thursday 11/01/01			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

Part Name	Part ID	Qty	Units	Unit \$	\$ Amount
Fuse	2414	5	box	\$ 2.31	\$ 11.55

Total Labor: \$ 352.50
Total Materials: \$ 11.55
Total Order Cost: \$ 364.05

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.

Top: The list view of work orders

Bottom: The detail screen with time and materials information

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

The screenshot shows a web browser window titled "Online Work Orders - Microsoft Internet Explorer". The page header includes "SCAAL Partners (Demo) Work Order Management" and "Welcome SCAAL Employee". The main content area is titled "Work Order Manager" and has two tabs: "Enter a New Work Order" (selected) and "Find a Submitted Work Order". Below the tabs is a "Work Order Request Info" form with the following fields:

- 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.]

At the bottom of the form is a "Submit Work Order" button. Below the form is a "Questions / Help" section with a link to "Email the Facilities Department" and the text "Powered by Facility Wizards - © 2001".

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.

The screenshot shows the same web browser window, but the "Find a Submitted Work Order" tab is selected. The form is titled "Search for a Work Order" and has a "Confirmation Number:" field with the value "RQ123" and a "Find" button. Below the form is a section titled "Your Recent Work Orders" with a table:

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

Below the table is a "Questions / Help" section with a link to "Email the Facilities Department" and the text "Powered by Facility Wizards - © 2001".

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.

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

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

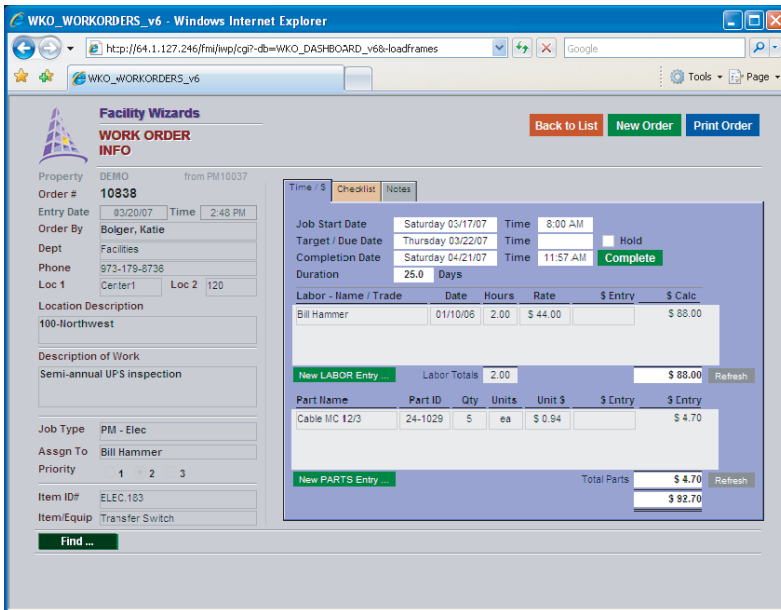
The Worker Interface - Web-Based or Mobile Device

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.



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.



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

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

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