

## Vision PM Module Use Case Section 1 – VT Admin Setup and Task Creation

### Definitions:

VT Admin	Vocation Admin Users, Has full access to the Administration Dashboard, can switch to any account using the “Switch Account” menu.
Account Users	Account user who have access to a company building. Account users include: General Manager, Portfolio Manager, Property Manager and Engineer.
Tenant Admin	A User that has full right to the tenant screen, can add/Modify/Delete users within their own company.
Tenant User	A user with limited rights on the tenant screen. Can NOT Add or Deleted users. Has the ability to modify their own information.
Development Server	dev.visionworkorders.com
Testing Server	qa.visionworkorders.com
Production server	<a href="https://visionworkorders.com">https://visionworkorders.com</a>
PM	Preventive Maintenance
PM Module	refers to a module that can be added to an existing work order program or can be a standalone product.
PM Templates	A set of PM Task the only VT Admin can modify. Located in the Administrator Menu in the VT Admin. PM Templates are visible to all Account Users
Template Name	Name of a defined list of templates for a group of equipment that have similar Tasks. Example: Fruit               <- Template Name Apple         <- Type Designation Pear          <- Type Designation
Type Designation	List of Equipment that fall under a Template Name

10.0 Synchronize Equipment when Templates are changed

10.1 Assume we have Equipment Template with a Template Name of “AIR-Type1”

10.2 Under PM – Equipment, We have a Six pieces of equipment that are using (tied) to the template name “Air Compressors”

Example of Equipment Template with 2 Task(s) and 2 Reading(s)

Air Compressors Red						
	Floor	Unit	Make/ Model	Location	Template	
+	1	1		Electrical closet	AIR-Type1	
+	1	2		Electrical closet	AIR-Type1	
+	2	1		Electrical closet	AIR-Type1	
+	2	2		Electrical closet	AIR-Type1	
+	3	1		Electrical closet	AIR-Type1	
+	3	2		Electrical closet	AIR-Type1	
Fire Pump						

PM – Equipment | Six pieces of equipment are using the “AIR-Type1” template.

10.3 When an Account User modifies the “AIR-Type1” template by adding a new Task(s) or Reading(s), each piece of equipment that is using that template MUST be updated to reflect the new Task(s) or Reading(s).

10.3.1 Each piece of equipment that is using the modified template will default to the Start Date that is created, the system user will then have to modify each piece of equipment that is effective.

Templated Modified with “New Task” with a Start Date of “July 2018”

PM – Work Orders							
PM – Equipment							
Equipment Templates							
Building Administration							
Email Templates							
Reports							
Company Console							
Utility							
Conference Rooms							
Change Password							
Logout							
Your Logout Timer 3:59:55							

  

Floor	Unit	Make/ Model	Location	Template
01	01		1st Floor	AIR-Type1
1	1	McQuade	1st floor	AIR-Type1

Air Compressors Red

Floor	Unit	Make/ Model	Location	Template
1	1		Electrical closet	AIR-Type1

Air Compressors Red - Type Designation - AIR-Type1 | Note -

Task - Order	Task Instruction	Frequency	Next Start Date	Start Day of Month	Start Date Adjustment	Assigned to
1	00-Task	Monthly	Jul 2018	8	Every Day (Sun-Sat)	Default
2	task	Monthly	Jul 2018	8	Every Day (Sun-Sat)	Conference Room

1	2		Electrical closet	AIR-Type1
2	1		Electrical closet	AIR-Type1
2	2		Electrical closet	AIR-Type1
3	1		Electrical closet	AIR-Type1
3	2		Electrical closet	AIR-Type1

Currently, PM-Equipment does not show the “New Task” that was entered.

10.3.2 Once the changes are made to each piece of equipment, create a link “Modified Equipment List” in the upper right hand corner of both Equipment Templates and PM –Equipment screens.

Work Orders

Preventive Maintenance

PM – Work Orders

PM – Equipment

Equipment Templates

Building Administration

Reports

Company Consoles

Utilities

Conference Room

Change Password

Logout

155 Federal Street

10 High Street

185 Cambridge Street

Create Template Name

Add Type Designation

Import Template

Search For

Template Name

Reset

Search

Create a link to a list of modified equipment.

Modified Equipment List

Existing PM Templates

Template Name	Type Designation	Type Description	
AIR COMPRESSOR			
ACP-Dry	AIR COMPRESSOR DRY SYSTEM		
ACP-SP	AIR COMPRESSOR SPRINKLER SYSTEM		
ACP-BC	AIR BAG COMPRESSOR		
Fan Coil Units			
FCU-001	Fan Coil Units – Type 001		
FCU-002	Fan Coil Units – Type 002		
FCU-003	Fan Coil Units – Type 003		

Equipment Template

Equipment Templates

New Building

Work Orders

Add Equipment

Add Multiple Equipment of Same Type

Search For

Air Compressor

Reset

Search

Create a link to a list of modified equipment

Modified Equipment List

Reset View

Expand All

Collapse All

Equipment List

Equipment Name	Floor	Unit	Make/ Model	Location	Template
A1	12	12	22	Test	
	2	A1	erew	Fire Pump Type 1	
A2	1	1	wqgw	BDWH-1	
AAA	12	12		Fire Pump Type 1	
	22	22		AIR-Type1	
	99	99		Fire Pump Type 1	

PM - Equipment

This link will show List of all Equipment that has been effected by the template modifications.

### 10.3.3 Modified Equipment List will show

Equipment Name, Floor, Unit, Template Name, Date last Modified, Number of Task effected, number of readings effected and Verified for the building that has been updated

Modified Equipment List							
Equipment Name	Floor	Unit	Template Name	Date last Modified	Task	Reading	Verified
Air Compressors Red	01	01	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	01	02	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	02	01	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	02	02	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	03	01	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	03	02	AIR-Type1	07/24/20018	01	0	OK

10.3.4 If Account User click “OK” under Verified, the link will be removed from the table.

10.3.5 If the Account User clicks anywhere on a row, a link will take them to the equipment (Task or Reading) where they can modify the start date

Modified Equipment List							
Equipment Name	Floor	Unit	Template Name	Date last Modified	Task	Reading	Verified
Air Compressors Red	01	01	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	01	02	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	02	01	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	02	02	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	03	01	AIR-Type1	07/24/20018	01	0	OK
Air Compressors Red	03	02	AIR-Type1	07/24/20018	01	0	OK

When a user click any where on a row, they will be taken to the edit screen for that equipment. Once clicked, this record will be removed from the table.

When user click "OK" under the Verified column, this record will be removed form the table

Modified Equipment List

Equipment detail Task/Reading

Tasks

Readings

Return to Modified Equipment List

Change the "Close" button to "Return to Modified Equipment List"

Air Compressor - Type Designation - AIR-Type1

View list

Task - Order	Task Instruction	Frequency	Start date	Seasonal	Start Day of Month
1	00-Task	Monthly	June 2018	Y	8
2	task	Monthly	June 2018	N	8

New Task or Reading to be listed and AU User will have the ability to modify start date

The new Task(s) or Reading(s) will appear in same same location as the template.

The user will be able to modify the start date of any Task(s) or Reading(s)

PM – Equipment | Equipment detail task/Reading

10.3.6 When Account User clicks “Return to Modified Equipment List” this screen will close and this Item will be removed.

10.3.7 Once all the equipment has been removed from the “Modified Equipment List” the “Modified Equipment List” on both the Equipment Templates and PM –Equipment screens will be removed.

#### 10.4 Change the color of the added task or reading to red so the use will know witch on need to be modified

Work Orders < Preventive Maintenance > PM - Work Orders PM - Equipment Equipment Templates Building Administration < Email Templates < Reports < Company Console < Utility < Conference Rooms < Change Password Logout

Create A New Designation Wizard - Step 2

Tasks Readings

A new task is entered for the "Air Handling Units"

Task Order	Task Instruction	Frequency	Start date	Seasonal	Start Date Of Month	
1	Just added task	Monthly	September 2018	N	1	✗
2	Task subset: New Subset	Frequency	Start date	Seasonal	Start Date Of Month	✗
1	new Task to find ID number	Monthly	July 2018	N	1	✗
3	Task subset: Test subset Second	Frequency	Start date	Seasonal	Start Date Of Month	✗
1	Task Instruction	Monthly	May 2018	N	1	✗
2	this is a new task!	Monthly	September 2018	N	1	✗
4	AAAAA - Add new Task	Monthly	October 2018	N	1	✗
5	Task subset: new subset	Frequency	Start date	Seasonal	Start Date Of Month	✗
1	task instruction first	Monthly	May 2018	N	1	✗
6	task pos	Monthly	May 2018	N	1	✗

Modified Equipment List

Equipment Name	Floor	Unit	Template Name	Date last Modified	Task	Reading	Verified
Pump	24	24	AHU - Type 1	09/18/2018	1	0	Ok
AAA-1	01	01	AHU - Type 1	09/18/2018	1	0	Ok
Air Handling Units	Roof	01	AHU - Type 1	09/18/2018	1	0	Ok
Air Handling Units	Roof	02	AHU - Type 1			0	Ok

Modifying the "Air Handling Unit" show that 4 pieces of equipment have been modified by the change

Work Orders < Preventive Maintenance > PM - Work Orders PM - Equipment Equipment Templates Building Administration < Email Templates < Reports < Company Console < Utility < Conference Rooms < Change Password Logout

Equipment detail Task/Reading

Tasks Readings Return to Modified Equipment List

Pump - Type Designation - AHU - Type 1 View list

Task - Order	Task Instruction	Frequency	Start date	Seasonal	Start Day of Month	
1	Just added task	Monthly	September 2018	N	1	✗
2	New Subset	Frequency	Start date	Seasonal	Start Day of Month	✗
1	new Task to find ID number	Monthly			1	✗
3	Test subset Second	Frequency			Start Day of Month	✗
1	Task Instruction	Monthly			1	✗
2	this is a new task!	Monthly			1	✗
4	new subset	Frequency			Start Day of Month	✗
1	task instruction first	Monthly			1	✗
5	task pos	Monthly	May 2018	N	1	✗

Change the font color to Red to let the use know that those values have been modified

#### 10.5 PM – Equipment : Add a way for the user to return back to pervious menu

preventive maintenance > PM - Work Orders PM - Equipment Equipment Templates Building Administration < Email Templates < Reports < Company Console < Utility < Conference Rooms < Change Password Logout Your Logout Timer 0:59:57

Add Equipment Add Multiple Equipment of same type

Search For Pump Reset Select

Equipment List

Equipment Name AAA-1

Floor 01 Unit 01 Maker/Model Location 1st floor

AAA-1 - Type Designation - AHU - Type 1 | Note - Some type of note

Task - Order	Task Instruction	Frequency	Next Start Date
1	Just added task	Monthly	September 2018
2	New Subset		Dec 2018
1	new Task to find ID number	Monthly	Dec 2018

When user select the equipment task/reading from the PM-Equipment

Equipment detail Task/Reading					
<div>Tasks</div> <div>Readings</div>					
AAA-1 - Type Designation - AHU - Type 1 <div>View list</div>					
Task - Order	Task Instruction	Frequency	Start date	Seasonal	Start Day of Month
1	Just added task	Monthly	September 2018	N	1
2	New Subset	Frequency	Start date	Seasonal	Start Day of Month
1	new Task to find ID number	Monthly	Dec 2018	N	1
3	Test subset Second	Frequency			Start Day of Month
1	Task Instruction	Monthly			1
2	this is a new task!	Monthly			1
4	AAAAA - Add new Task	Monthly			1
5	new subset	Frequency	Start date	Seasonal	Start Day of Month
1	task instruction first	Monthly	Dec 2018	N	1
6	task pos	Monthly	Dec 2018	N	1

Currently the use has no way to return back to the previous screen

Equipment detail Task/Reading					
<div>Tasks</div> <div>Readings</div> <div>Complete</div>					
AAA-1 - Type Designation - AHU - Type 1 <div>View list</div>					
Task - Order	Task Instruction	Frequency	Start date	Seasonal	Start Day of Month
1	Just added task	Monthly	September 2018	N	1
2	New Subset	Frequency	Start date	Seasonal	Start Day of Month
1	new Task to find ID number	Monthly	Dec 2018	N	1
3	Test subset Second	Frequency			Start Day of Month
1	Task Instruction	Monthly			1
2	this is a new task!	Monthly			1
4	AAAAA - Add new Task	Monthly			1
5	new subset	Frequency	Start date	Seasonal	Start Day of Month
1	task instruction first	Monthly	Dec 2018	N	1
6	task pos	Monthly	Dec 2018	N	1

Add a "Complete" button for the user to be able to return to the "PM-Equipment" form

- 11.0 Add the ability to Modify Equipment
- 11.1 Add the ability to edit the equipment Name

Equipment List

Equipment Name

AAA-1

<

Add an Edit Button for the Equipment Name

Edit Equipment Name

Edit Equipment Name

Air Handling units Task

Update

Cancel

## 11.2 Add the ability to edit Floor / Unit ....

The screenshot shows a table titled "Equipment List" with columns: Floor, Unit, Make/ Model, Location, and Template. It lists three categories: AAA-1, Air Handling Units, and Pump. Each row has an edit icon (pencil) in the Template column. A yellow callout box with the text "Add an Edit Button for the piece of Equipment" points to the edit icon in the first row of the Air Handling Units section. Red arrows point from the callout box to the edit icons in the other rows of the Air Handling Units and Pump sections.

	Floor	Unit	Make/ Model	Location	Template
AAA-1	01	01		1st floor	AHU - Type 1
Air Handling Units	Roof	01	McQuade	East	AHU - Type 1
	Roof	02	McQuade	West	AHU - Type 1
Pump	01	01	McQuade	1st Floor	A Fire Pump
	01	01	McQuade	1st Floor	A Fire Pump
	01	02		1	A Fire Pump
	01	02		1	A Fire Pump

The screenshot shows the "Edit Equipment" form. It has fields for Equipment Name, Unit, Floor, Location, Serial number, Make / Model, In Service Date, and Note. There is also a Status dropdown menu and two "Browse..." buttons for uploading a picture and manual. A yellow callout box with the text "Equipment Name and Attached Template disabled and are not able to be modified" points to the Equipment Name and Attach Template fields. Red arrows point from the callout box to the Equipment Name and Attach Template fields.

**Edit Equipment**

**Equipment Name\*** Air Handling Units

**Attach Template\*** Air Handling units Task | AHU - Type 1 this is a te

**Unit\*** 01

**Floor\*** 01

**Location\*** First Floor

**Serial number**

**Make / Model**

**In Service Date** 09/18/2018

**Note:**

**Status** Active

**Equipment Manual**

Save Cancel

11.2.1 The User will be able to Change Unit, Floor, Location, Serial Number, Notes, Upload / Remote Picture and manual.

11.2.2 Use will also be able to set unit status as "Inactive" or "Active"

### 11.2.3

## 11.3 Edit Start Dates and assign user

### 11.3.1 Add the ability to assign user

Equipment detail Task/Reading

Task(s) Reading(s)

Air Handling Units - Type Designation - AHU

Task - Order	Task Instruction
1	Just added taks
2	New Subset
3	Test subset Second
4	AAAAA - Add new T
5	new subset
6	task instruction first
6	task pos

#### Edit Start date

**Level-Subset** Root

**Task Instruction** Just added taks

**Frequency** ☒ Monthly ☐ Perform Task Every 1

**Start Date** September 2018 **End Date (Optional)**

☐ Seasonal task (If Checked)

**Begin Date** January **Stop Date** January

**Day Of Month** 1 ☐ Last Day

**Date Adjustment** Monday thru Friday

**Job-Time(In Hours)** ☒ 1 Minute ☐ Hour(s) 1 Minute(s) 1 Minute

**Over Time/Off Hours** No

**Assigned To** Default

Cancel Update &

Currently the Assign to is disabled, Enable it so the can assign to the correct user