## 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.

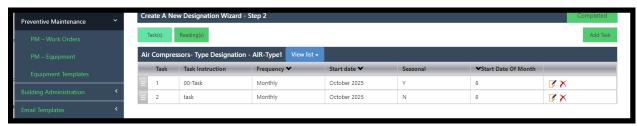
Example:

Fruit <- Template Name
Apple <- Type Designation
Pear <- Type Designation

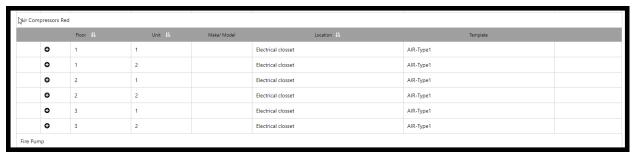
Type Designation List of Equipment that fall under a Template Name

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- 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"

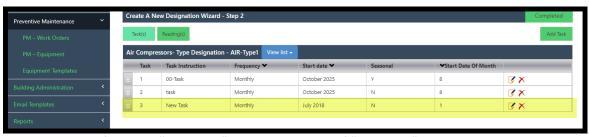


Example of Equipment Template with 2 Task(s) and 2 Reading(s)



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.



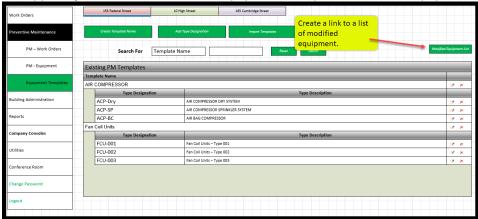
Templated Modified with "New Task" with a Start Date of "July 2018"

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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.



**Equipment Template** 



PM - Equipment

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

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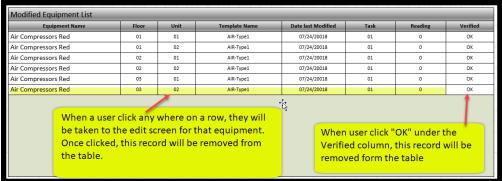
10.3.3 Modified Equipment List will show

Equipment Name, Floor, Unit, Template Name, Date last Modified, Number of Task effected,

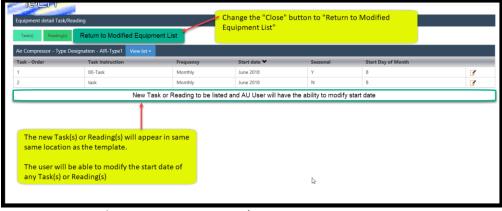
number of readings effected and Verified for the building that has been updated

Equipment Name	Floor	Unit	Template Name	Date last Modified	Task	Reading	Verified
Air Compressors Red	01	01	AIR-Type1	07/24/20018	01	0	ОК
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
				Ė			

- 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** 



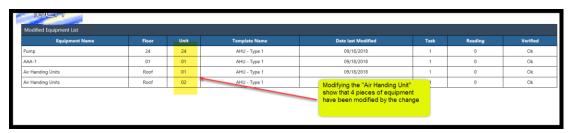
PM - Equipment | Equipment detail task/Reading

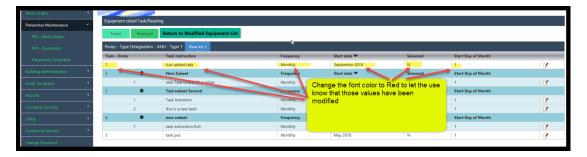
- 10.3.6 When Account User clicks "Return to Modified Equipment List" this screen will close and this Item will be removed.
- 10.3.7 Once all the equipment has been removed from the "Modified Equipment List" the "Modified Equipment List" on both the Equipment Templates and PM –Equipment screens will be removed.

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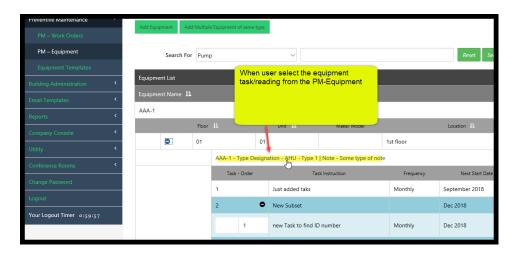
10.4 Change the color of the added task or reading to red so the use will know witch on need to be modified







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



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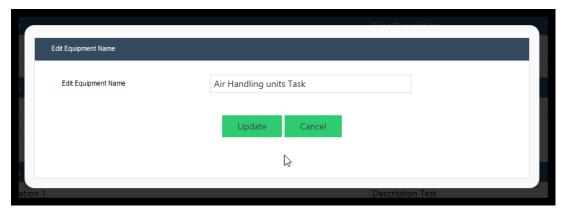




# 11.0 Add the ability to Modify Equipment

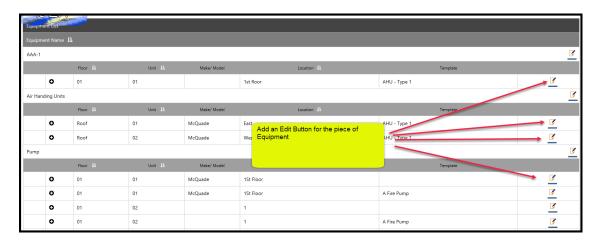
11.1 Add the ability to edit the equipment Name

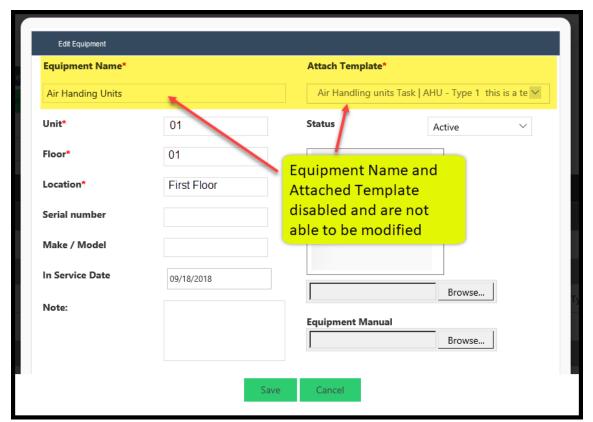




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#### 11.2 Add the ability to edit Floor / Unit ....



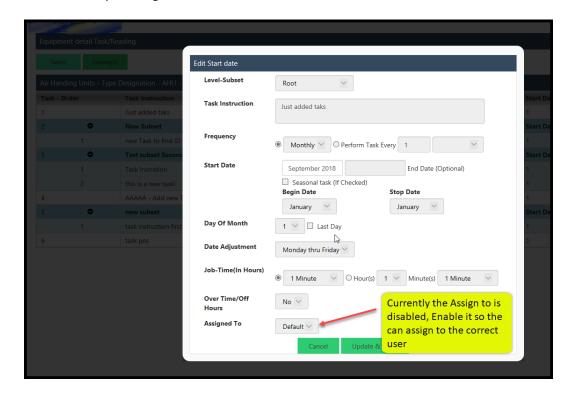


- 11.2.1 The User will be able to Change Unit, Floor, Location, Serial Number, Notes, Upload / Remote Picture and manual.
- 11.2.2 Use will also be able to set unit status as "Inactive" or "Active"

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### 11.2.3

- 11.3 Edit Start Dates and assign user
  - 11.3.1 Add the ability to assign user



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