

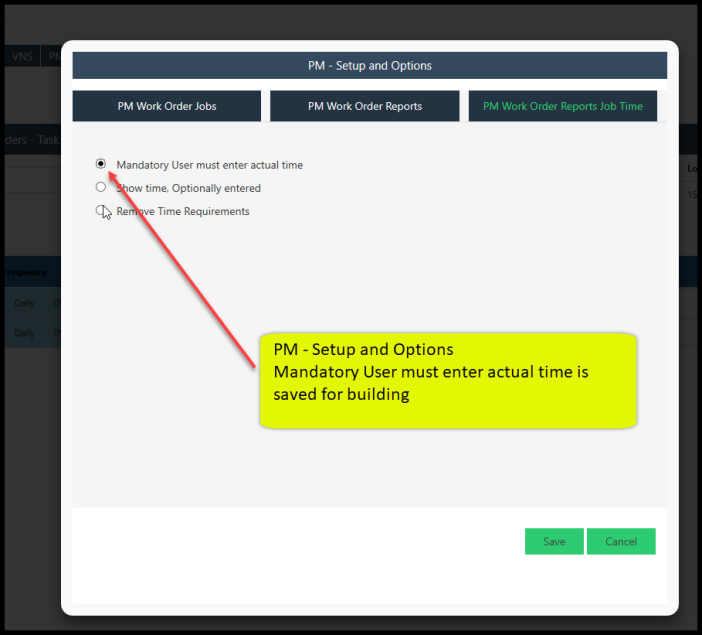
Vision PM Module Use Case Section 1 – VT Admin Setup and Task Creation

Definitions:

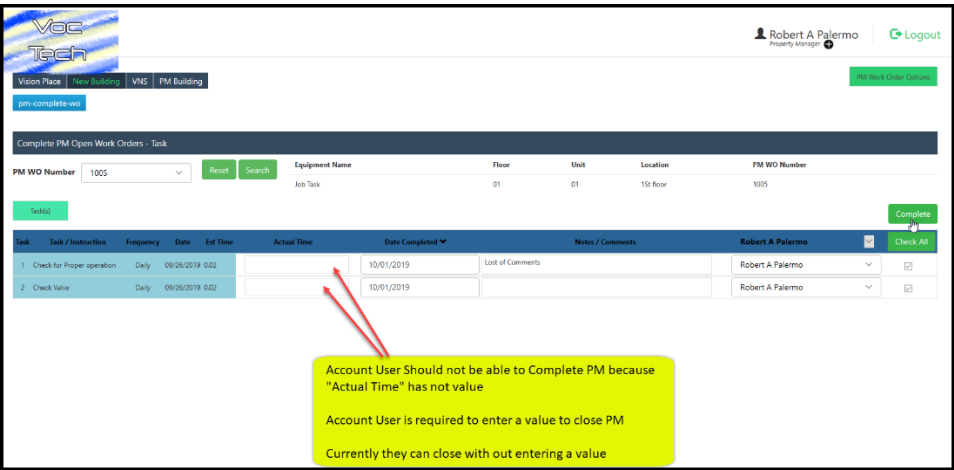
VT Admin	Vocation Admin Users, has full access to the Administration Dashboard, can switch to any account using the “Switch Account” menu.
Account Users	Account user who have access to a company building. Account users include: General Manager, Portfolio Manager, Property Manager and Engineer.
Tenant 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	https://visionworkorders.com
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

BAT ID

1332 – PM – Complete WO's, PM Work Order Options set to "Mandatory User must enter actual time" is set, but the Account User still can close out PM's with out entering a value.



Building set for Mandatory User must enter actual time in Options.



Account User Should not be able to Complete PM because "Actual Time" has not value
Account User is required to enter a value to close PM
Currently they can close without entering a value

BAT ID

1333 – Sub Task and Reading default to today's date, should be left blank not prefilled

Voc Tech

Robert A Palermo Property Manager Logout

Vision Place New Building **VOC** PM Building

pm-complete-wo

Complete PM Open Work Orders - Task

PM WO Number: 1006

Equipment Name	Floor	Unit	Location	PM WO Number
AHU	01	01	1st floor	1006

Task	Task / Instruction	Frequency	Date	Est Time	Actual Time	Date Completed ▼	Notes / Comments	Completed By	Check All
1	Check all actuators for leaks	Monthly	08/01/2019	0.08				Select From List	<input type="checkbox"/>
2	Check for loose electrical connections	Monthly	08/01/2019	0.08				Select From List	<input type="checkbox"/>
3	Check general operation and condition of equipment	Monthly	08/01/2019	0.08				Select From List	<input type="checkbox"/>
4	Check for unusual noise and vibration	Monthly	08/01/2019	0.08				Select From List	<input type="checkbox"/>
5	Bi-Yearly Task								
5-1	Check motor and fan sheaves	Bi-Yearly	08/01/2019	0.08		09/26/2019		Select From List	<input type="checkbox"/>
5-2	Clean unit and motor	Bi-Yearly	08/01/2019	0.17		09/26/2019		Select From List	<input type="checkbox"/>
5-3	Clean adjust & lubricate fire dampers	Bi-Yearly	08/01/2019	0.17		09/26/2019		Select From List	<input type="checkbox"/>
5-4	Check bucket tightness to fan shaft	Bi-Yearly	08/01/2019	0.17		09/26/2019		Select From List	<input type="checkbox"/>
5-5	Check vibration isolation springs	Bi-Yearly	08/01/2019	0.17		09/26/2019		Select From List	<input type="checkbox"/>
5-6	Check starter contacts	Bi-Yearly	08/01/2019	0.17		09/26/2019		Select From List	<input type="checkbox"/>
5-7	Clean condensate and machine room floor drains	Bi-Yearly	08/01/2019	0.17		09/26/2019		Select From List	<input type="checkbox"/>
5-8	Reset run hour attribute on EMS	Bi-Yearly	08/01/2019	0.08		09/26/2019		Select From List	<input type="checkbox"/>

BAT ID

1134 – Change the "Date Completed" select drop-down, The AU should be able to select any part of the Date Completed to show the dates, make it work like the Completed By drop down.

Voc Tech

Robert A Palermo Property Manager Logout

Vision Place New Building **VOC** PM Building

pm-complete-wo

Complete PM Open Work Orders - Reading

PM WO Number: 1006

Equipment Name	Floor	Unit	Location	PM WO Number
AHU	01	01	1st floor	1006

Task	Task / Instruction	Frequency	Date	Est Time	Actual Time	Date Completed ▼	Notes / Comments	Completed By	Check All
1	Check operation of lead/lag	Bi-Yearly	08/01/2019	0.08				Robert A Palermo Donna Palermo Robert A Palermo	<input type="checkbox"/>
2	Check relief valves	Bi-Yearly	08/01/2019	0.08				Select From List	<input type="checkbox"/>
3	Check vibration eliminators for operation	Bi-Yearly	08/01/2019	0.08				Select From List	<input type="checkbox"/>
4	Check oil pressure	Bi-Yearly	08/01/2019	0.08				Select From List	<input type="checkbox"/>
5	Inspect all electrical connections	Bi-Yearly	08/01/2019	0.08				Select From List	<input type="checkbox"/>
6	Change oil	Bi-Yearly	08/01/2019	0.33				Select From List	<input type="checkbox"/>
7	Check belts for wear, cracks and proper tension	Bi-Yearly	08/01/2019	0.08				Select From List	<input type="checkbox"/>

BAT ID

1135 – When a reading Value is out of Tolerance, The Account user should be able to add notes, the **** Out of Tolerance Value Entered **** will still be save to the database with the added to the Account User notes

Custom Plans

New Building

VNS

PM Building

pm-complete-wr

PM Work Order Options

Complete PM Open Work Orders - Reading

PM WO Number1006

Reset

Search

Equipment NameAir Compressors

PM WO Number1006

Tafels

Readings

Complete

Seq	Reading / Instruction	Frequency	Date	Est. Time	Assigned Value	Tolerance %	Actual Time	Reading Value	Date Completed	Notes / Comments	Robert A Pale	Check All
1	L1 Amps	Bi-Yearly	07/01/2019 0.08	15	Amps(s)	15.00		19	10/01/2019	**** Out of Tolerance Value Entered ****	Robert A Pale	<input type="checkbox"/>
2	L2 Amps	Bi-Yearly	07/01/2019 0.08	15	Amps(s)	15.00		19	10/01/2019	**** Out of Tolerance Value Entered ****	Robert A Pale	<input type="checkbox"/>
3	L3 Amps	Bi-Yearly	07/01/2019 0.08	15	Amps(s)	15.00		34	10/01/2019	Side	Robert A Pale	<input type="checkbox"/>

The Notes Added to the database should read as follows:

**** Out of Tolerance Value Entered ****
Need to change out motor ASAP