

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 |

- 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”

Preventive Maintenance

PM – Work Orders

PM – Equipment

Equipment Templates

Building Administration

Email Templates

Create A New Designation Wizard - Step 2

Completed

Task(s)

Reading(s)

Add Task

Air Compressors- Type Designation - AIR-Type1

View list

| Task | Task Instruction | Frequency | Start date | Seasonal | Start Date Of Month | |
|------|------------------|-----------|--------------|----------|---------------------|--|
| 1 | 00-Task | Monthly | October 2025 | Y | 8 | |
| 2 | task | Monthly | October 2025 | N | 8 | |

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.

Preventive Maintenance

PM – Work Orders

PM – Equipment

Equipment Templates

Building Administration

Email Templates

Reports

Create A New Designation Wizard - Step 2

Completed

Task(s)

Reading(s)

Add Task

Air Compressors- Type Designation - AIR-Type1

View list

| Task | Task Instruction | Frequency | Start date | Seasonal | Start Date Of Month | |
|------|------------------|-----------|--------------|----------|---------------------|--|
| 1 | 00-Task | Monthly | October 2025 | Y | 8 | |
| 2 | task | Monthly | October 2025 | N | 8 | |
| 3 | New Task | Monthly | July 2018 | N | 1 | |

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

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 | | | |
| | Type Designation | Type Description | |
| FCU-001 | Fan Coil Units – Type 001 | | |
| FCU-002 | Fan Coil Units – Type 002 | | |
| FCU-003 | Fan Coil Units – Type 003 | | |

Create a link to a list of modified equipment.

Modified Equipment List

Equipment Template

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

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 | | | |
| | Type Designation | Type Description | |
| FCU-001 | Fan Coil Units – Type 001 | | |
| FCU-002 | Fan Coil Units – Type 002 | | |
| FCU-003 | Fan Coil Units – Type 003 | | |

Create a link to a list of modified equipment

Modified Equipment List

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 Add Task

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 date | Seasonal | Start Day of Month | ✗ |
| 1 | Task Instruction | Monthly | | | 1 | ✗ |
| 2 | this is a new task! | Monthly | | | 1 | ✗ |
| 4 | new subset | Frequency | Start date | Seasonal | 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

Task(s) Reading(s)

AAA-1 - 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 | Dec 2018 | N | 1 |
| 3 | Test subset Second | Frequency | Start date | Seasonal | 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

Task(s) Reading(s) Complete

AAA-1 - 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 | Dec 2018 | N | 1 |
| 3 | Test subset Second | Frequency | Start date | Seasonal | 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

| Floor | Unit | Make/ Model | Location | Template |
|-------|------|-------------|----------|--------------|
| 01 | 01 | | | AHU - Type 1 |
| Roof | 01 | McQuade | | AHU - Type 1 |
| Roof | 02 | McQuade | West | AHU - Type 1 |
| Pump | 01 | 01 | McQuade | 15th Floor |

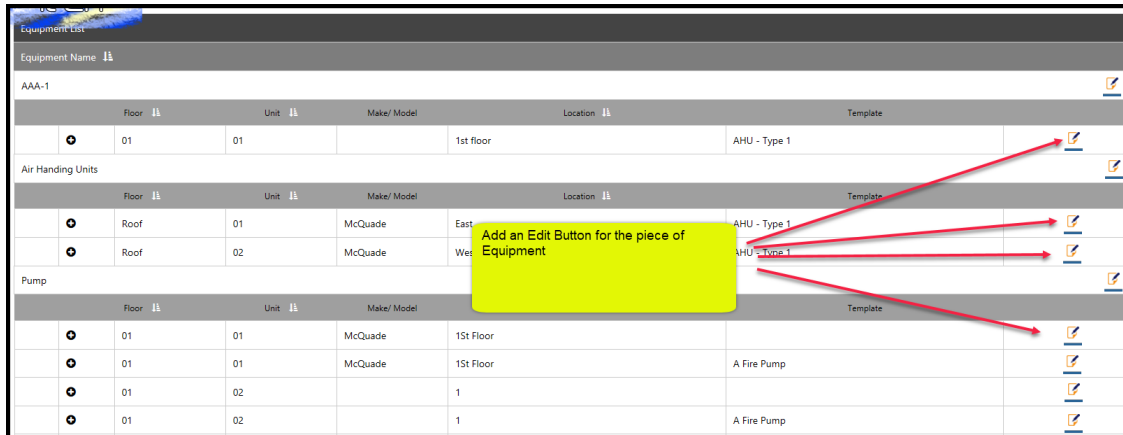
Add an Edit Button for the Equipment Name

Edit Equipment Name

Edit Equipment Name Air Handling units Task

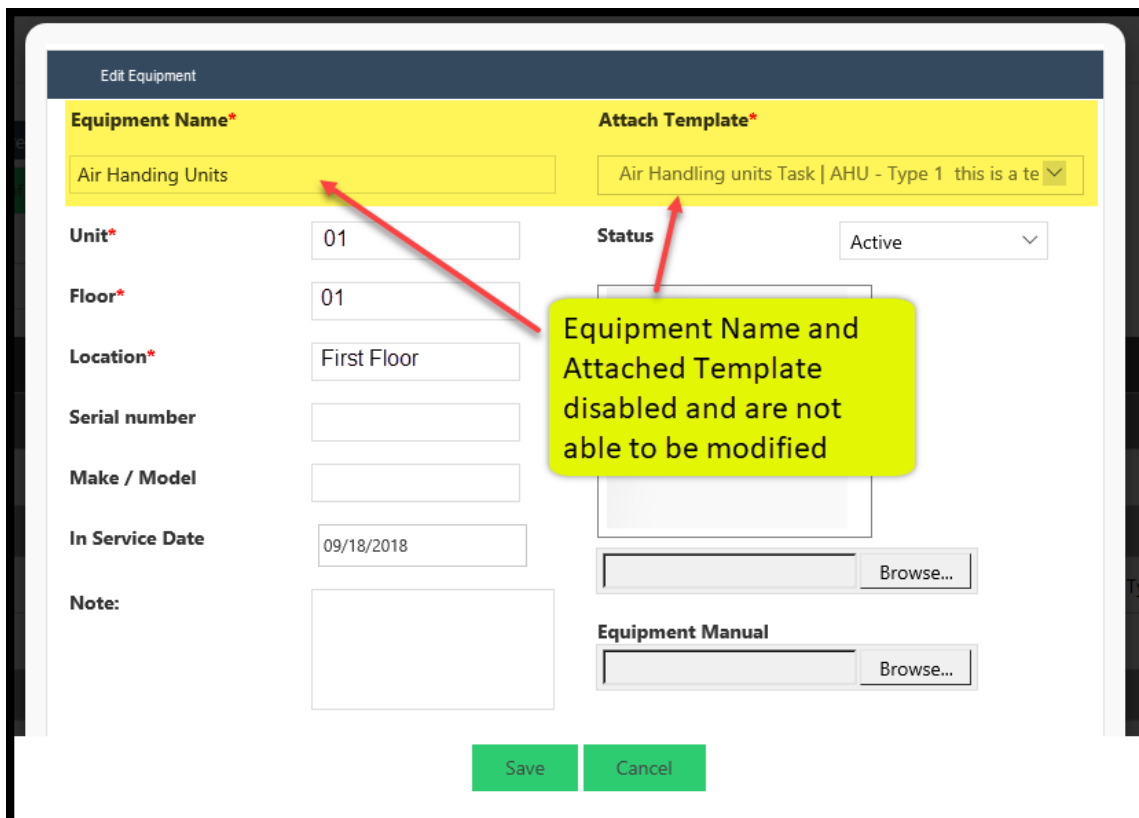
Update Cancel

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. A yellow callout box points to the "Air Handling Units" section with the text "Add an Edit Button for the piece of Equipment". Red arrows point from this callout to the edit icons (pencil icons) in the Template column for the "Air Handling units Task | AHU - Type 1" row.

| | 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. A yellow callout box points to the "Equipment Name" and "Attach Template" fields with the text "Equipment Name and Attached Template disabled and are not able to be modified". Red arrows point from this callout 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 Browse...

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 Equipment Manual

The screenshot shows the 'Edit Equipment' form with the following fields and annotations:

- Equipment Name***: Text input field containing 'Equipment'.
- Attach Template***: Dropdown menu showing 'Equipment | Ac Maintenance Test description'.
- Unit***: Text input field containing '2'.
- Floor***: Text input field containing '1'.
- Location***: Text input field containing 'west'.
- Serial**: Text input field (empty).
- Make**: Text input field (empty).
- In Service Date**: Text input field containing '07/24/2018'.
- Note:**: Text area (empty).
- Equipment Manual**: Section containing a 'Choose File' button and a list of files: 'PS_AK_DN2_2267.pdf' and 'Manual_3do.pdf'. A red 'X' is next to each file name.
- Buttons**: 'Save' and 'Cancel' buttons at the bottom.

Annotations (yellow boxes with red arrows):

- Create the ability to add multiple manuals**: Points to the 'Choose File' button and the file list.
- Create the ability to remove and Equipment Manual**: Points to the red 'X' marks next to the file names.

- 11.2.3.1 Add the ability for user to be able to remove any PDF document listed
- 11.2.3.2 Add the ability to add unlimited number of PDF documents.

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