

adding fields which apply to my client
- hiding tabs, etc

Adding wo

planner - spares, labour, etc
artisan - basic

Roles?

- planner
- scheduler
- data capturer
- artisan
- power user (administrator)

out of the box best practises
default steps?

auto generate screens? (e.g. isolated approval page)

****POST MEETING**

- get on key out of the way where ever possible
 - email approvals
 - link to isolated page providing relevant info
 - offline?
- planner overview
 - waiting for approval
 - wo statuses
 - feedback review
- integrated collaborative processes

***MEETING 2

What are the roles?

helpdesk - lookup asset old existing wo's, communicate to contractor
artisan does work

changes done to asset tree

What are the process involved?

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create
approve, helpdesk, manager
does work, give feedback

—Data capturer

find work order