Operations & Maintenance

EvolveFM

User Guide

EvolveFM™ Operations & Maintenance

CAFM Resources

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1: About Operations & Maintenance

Operations & Maintenance Overview

Operations & Maintenance Components

Operations & Maintenance Overview

The CMMS (Computerized Maintenance Management Software) functions and tools available in the EvolveFM Operations & Maintenance module have been designed to assist a maintenance department with their primary responsibilities:

- Fix things that need repair
- Prevent things from breaking

How you implement the functions and tools should reflect the way your maintenance department operates, and your EvolveFM Operation & Maintenance module users should reflect the makeup of your maintenance department and how it communicates.

What can be maintained?

The things that need to be maintained within your facility are physical items like equipment and locations. In Evolve these physical items are identified as assets and locations:

- Assets (Equipment, Artwork, Furniture, etc)
- Locations (Property, Building, Floor, Space)

Who does the work?

The people or vendors who perform the maintenance work are identified in Evolve as your labor providers.

- Labor

What about parts & materials?

The parts and materials available to perform the maintenance work are stored in your Evolve Material list.

- Materials

Integrating CMMS & CAFM

The CMMS functions and tools in the Operations & Maintenance module are tied together with the CAFM (Computer Aided Facilities Management) features in the EvolveFM Space & Assets module. This integration of CMMS & CAFM pulls together the assets, locations, and labor that your maintenance people need to do their job.

- Assets used in the Operations & Maintenance module utilize the assets created in the Space & Assets module.
- Locations used in the Operations & Maintenance module utilize the property, building, floor, & space locations created in the Space & Assets module.
- Labor used in the Operations & Maintenance module utilizes contacts (people and vendors) created in the Space & Assets module.

Security & Permissions

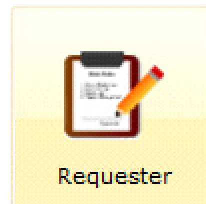
All features and functions of the Operations & Maintenance module can be controlled by the user management tools in EvolveFM, allowing the Evolve administrator to restrict access to specific maintenance functions and controls by each user login.

Operations & Maintenance Components

The EvolveFM Operations & Maintenance module is comprised of the following three components.

- Requester Component
- Call Center Component
- Maintenance Component

Requester Component



The Requester component is designed to provide users the ability to submit service requests via the web.

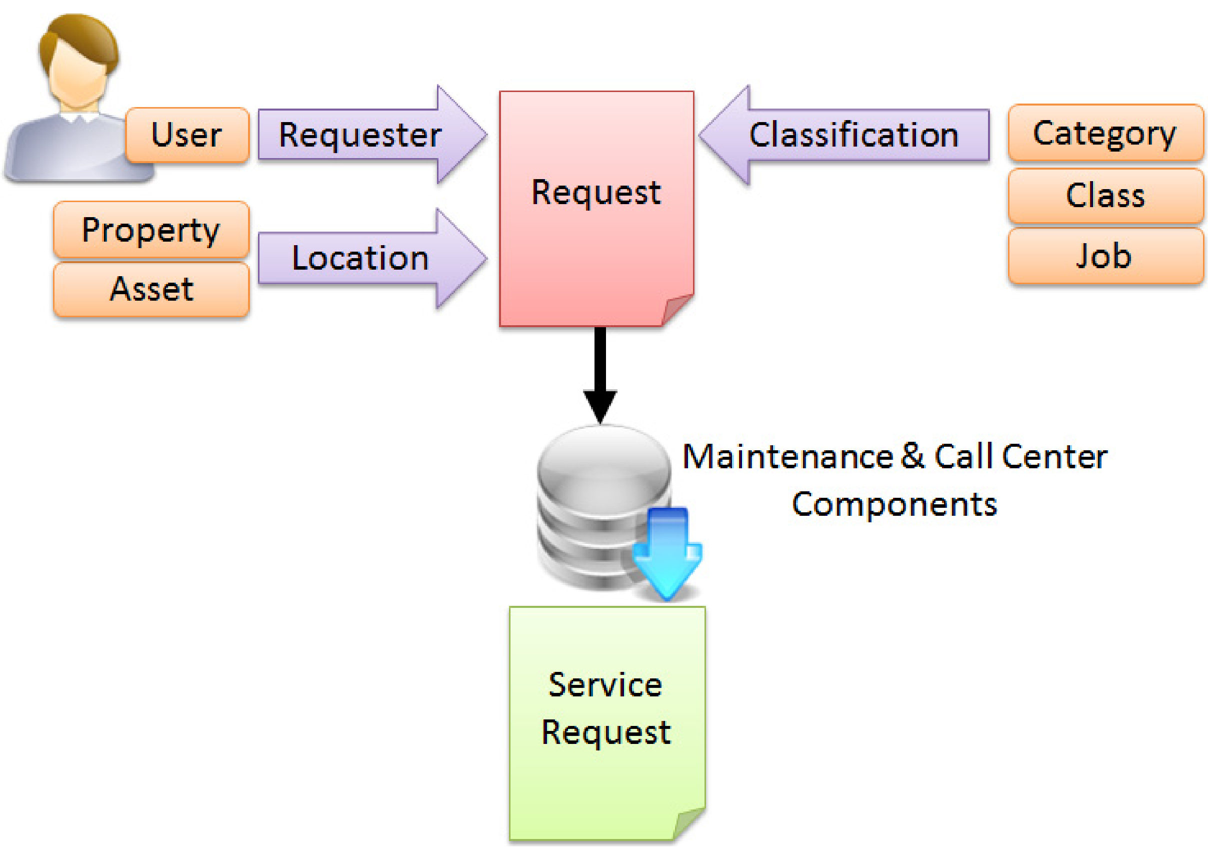
Use the Requester component to:

- Submit service Requests via the web
- View all of your submitted Requests
- Track all activity related to your Requests

Requester Work Flow

All submitted Requests will be automatically distributed to the Call Center component and the Maintenance component, and an EvolveFM Service Request will be generated.

Figure 1—Requester Component - Request Work Flow



Call Center Component

The Call Center component is designed for organizations that have designated personnel who are responsible for the management of all incoming service requests.

Use the Call Center module to:

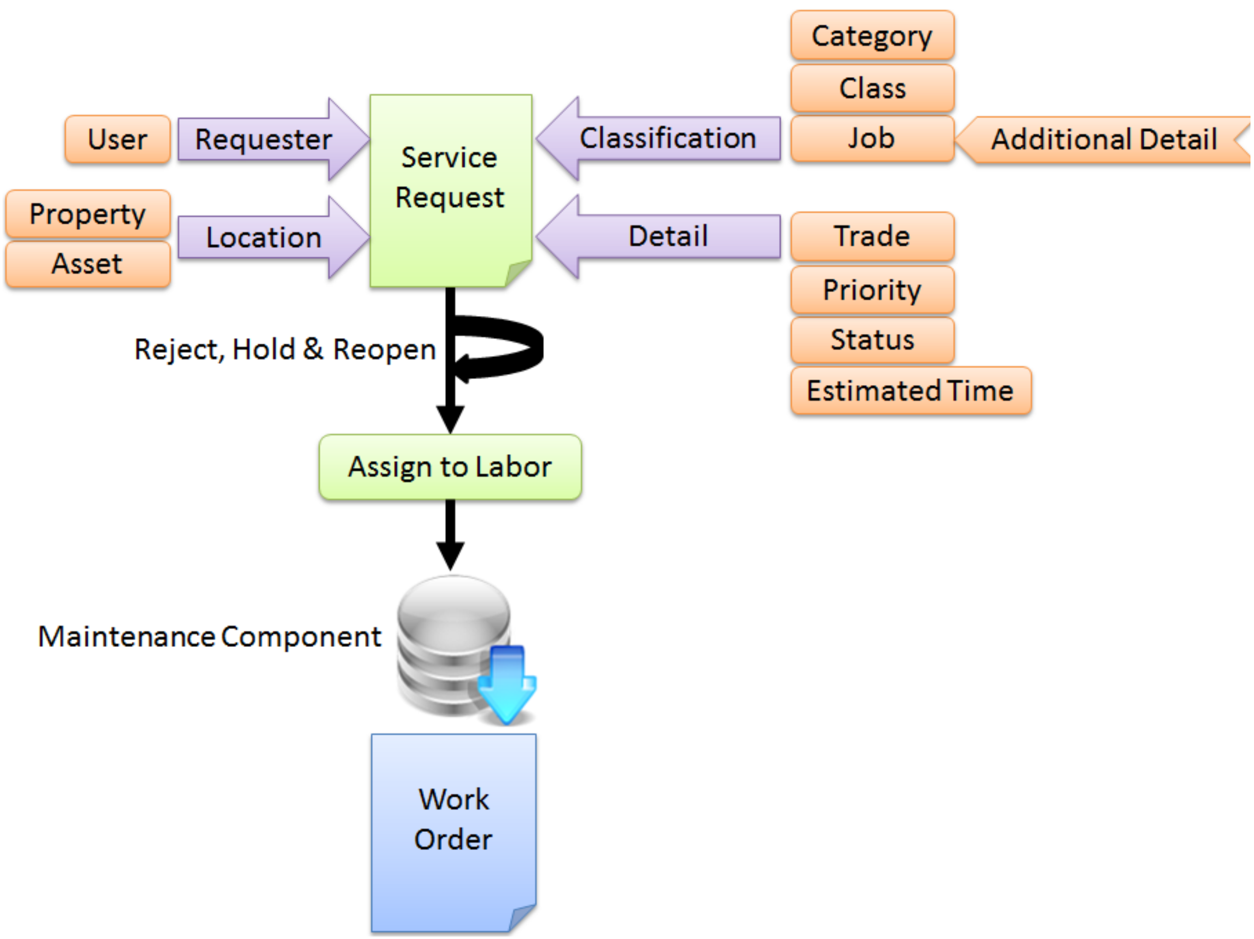
- View & manage all EvolveFM Service Requests
- Create new Service Requests
- Turn Service Requests into Work Orders and distribute them to the Maintenance component

Call Center Work Flow

The Call Center component stores all EvolveFM Service Requests that are generated from the Requester component, the Call Center component, or the Maintenance component.

As Service Requests are generated, the Call Center user can fill out additional information if needed and determine the action required to process the request. If the Call Center user assigns the Service Request to a labor provider a Work Order will be automatically generated in the Maintenance Component.

Figure 2—Call Center Component - Service Request Work Flow



Maintenance Component

The Maintenance component is the only component that is required to create, process, and manage Service Requests & Work Orders in EvolveFM.

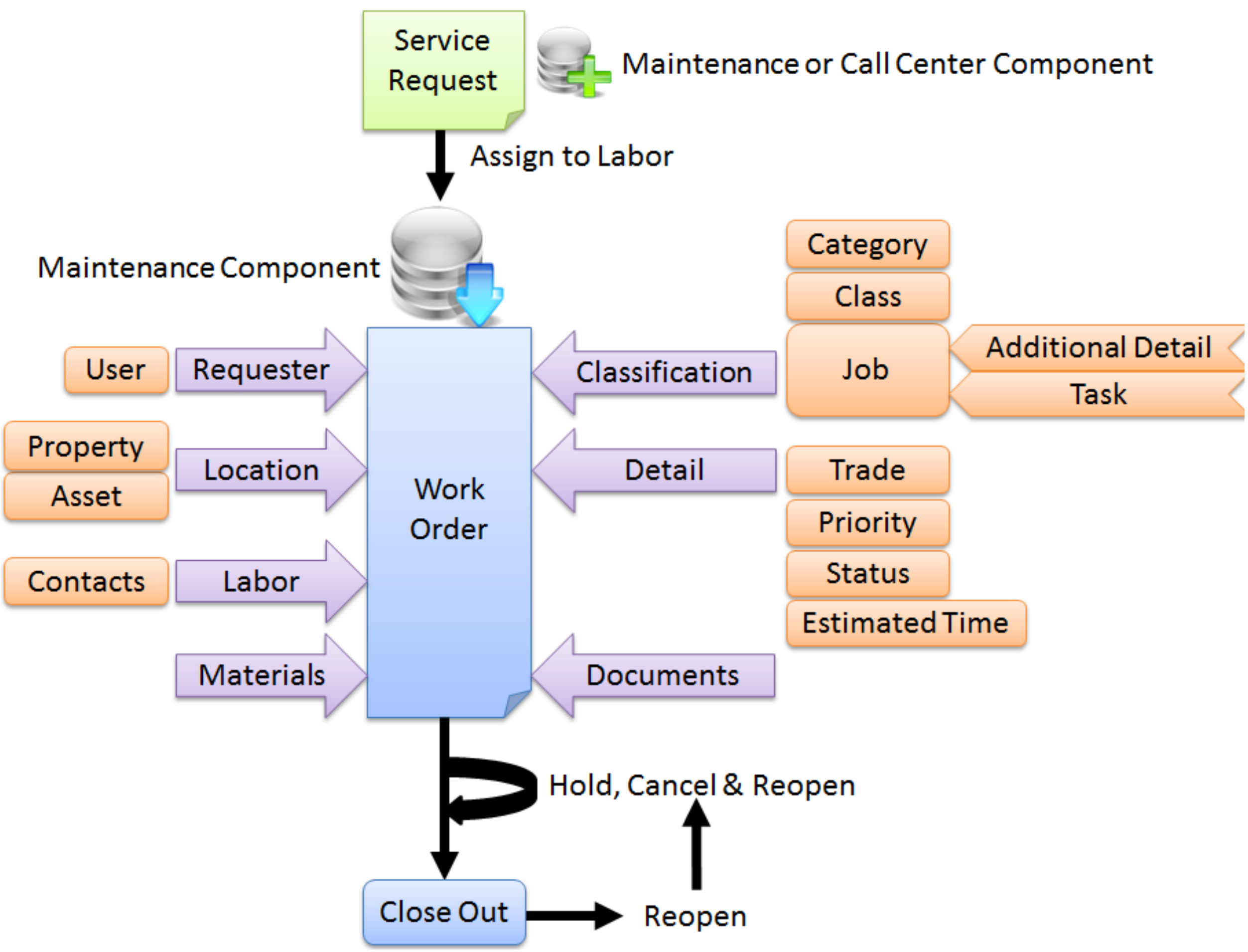
Use the Maintenance component to:

- Manage all Operations & Maintenance Administration tasks
- Manage Labor & Materials
- Create, manage & view all EvolveFM Service Requests
- Create, manage & view all EvolveFM Work Orders
- Create, manage & view Work Orders assigned only to you

Maintenance Work Flow

The Maintenance component stores all EvolveFM Service Requests that are generated from the Requester component, the Call Center component, or the Maintenance component. A Maintenance user can add a new Work Order, or a Work Order can be automatically generated when a Service Request is assigned to a labor provider. As Work Orders are generated, the Maintenance user can fill out additional information if needed and determine the action required to process the Work Order.

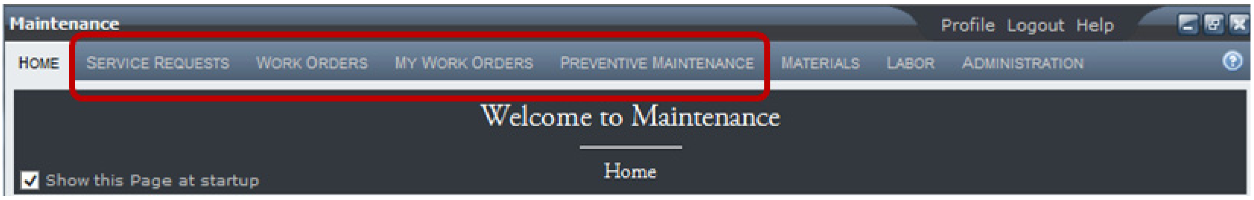
Figure 3—Maintenance Component - Work Order Work Flow



Maintenance Management Functions

The maintenance management functions accessed from the Maintenance menu are used to create and manage service requests and work orders in EvolveFM.

Figure 4—Maintenance Component Menu Bar

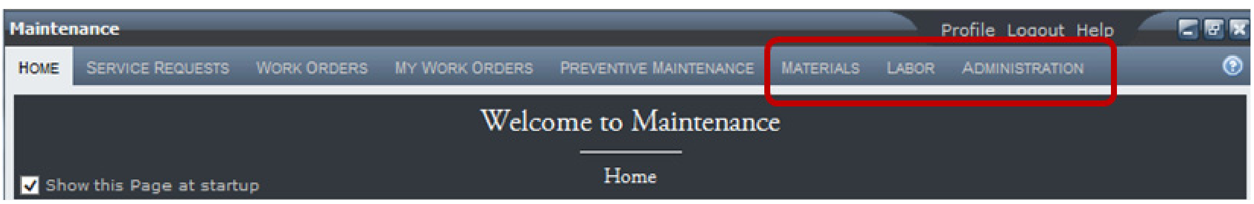


- Service Requests
- Work Orders
- My Work Orders
- Preventive Maintenance

Maintenance Setup Functions

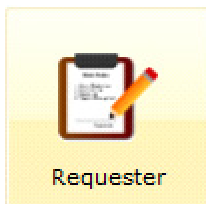
The maintenance setup functions accessed from the Maintenance menu, are used to configure the EvolveFM Operations & Maintenance module to meet the needs of your organization. Based on your configuration of these settings you control how automated the creation and assignment of work orders will be.

Figure 5—Maintenance Component Menu Bar



- Materials
- Labor
- Administration

2: Requests



Requester Grid

Requester Form

Managing Requests

Requester Grid

The Requester grid located in the Requester component, displays a list of all service requests submitted by the current user.

All submitted service requests are automatically distributed to both the Maintenance Module (Service Requests tab) and the Call Center module (Service Requests tab)

Use the requester grid to:

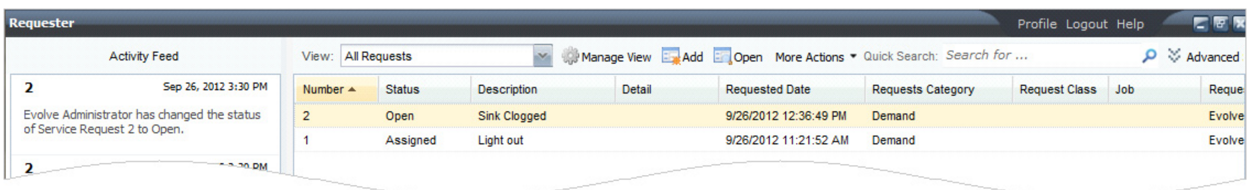
- Retrieve a list of all your submitted service requests
- Add a new service request record
- Open the Request form to a specific service request record

Note: *Once created, a service request will remain in the Request grid until its related work order status changes to Closed. Once closed, the service request will be removed from the grid list.*

To display the requester grid:

1. Double-click the Requester icon on the EvolveFM desktop.

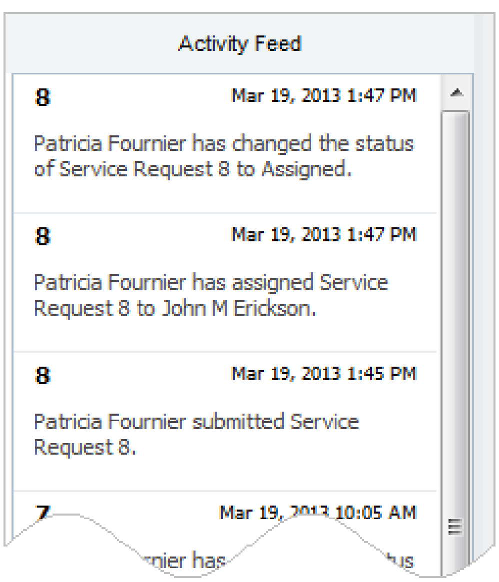
Figure 1—Requester Grid List



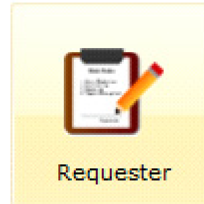
Activity Feed

The Activity Feed located in the Requester component displays a read-only list of all activity related to the current user's service requests.

Figure 2—Activity Feed



Request Form



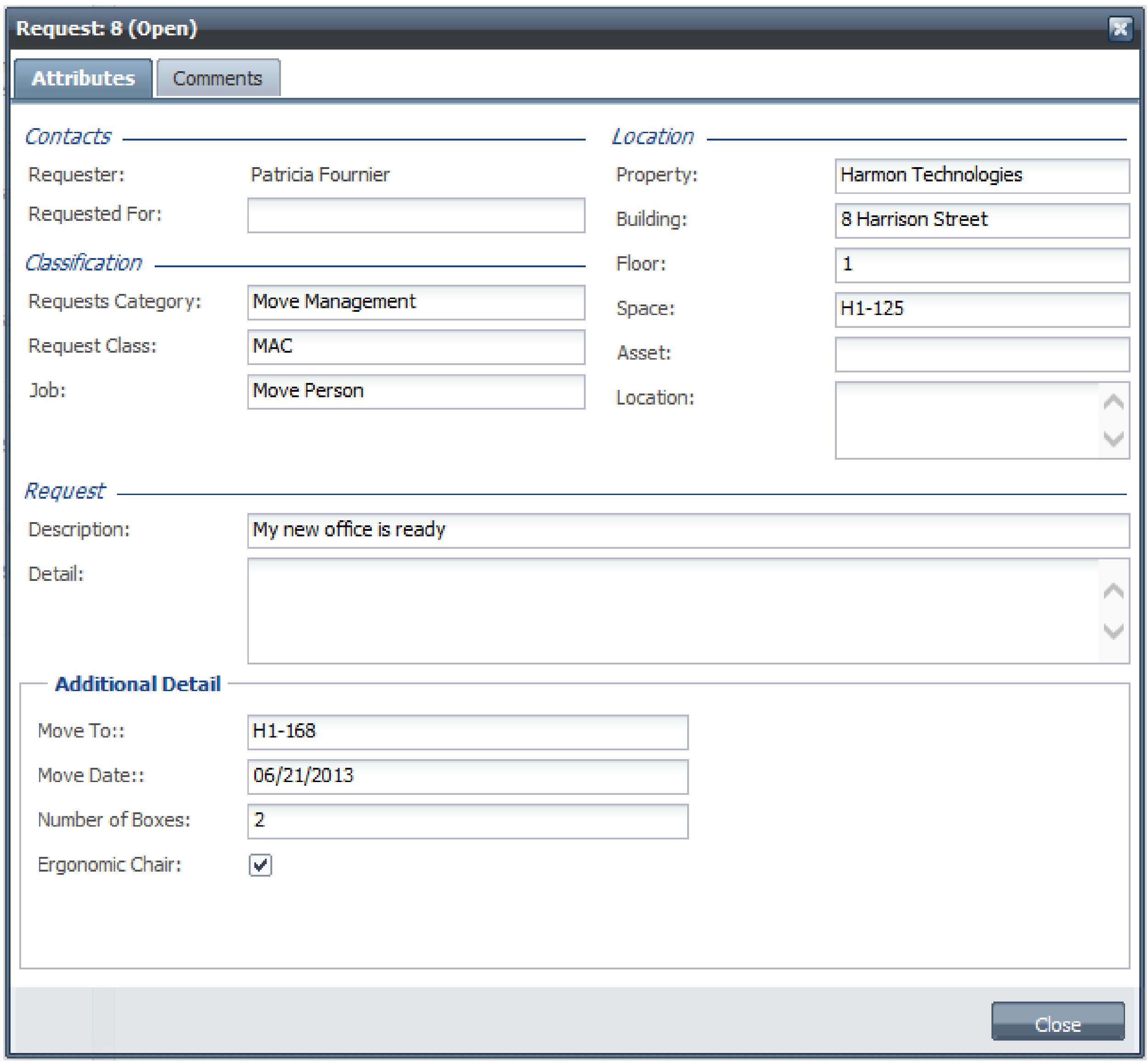
The Request form is used to submit service requests via the web.

To display the request form:

1. Double-click the Requester icon on the EvolveFM desktop.
2. Do one of the following:

- Click Add to open the Request form to a new record.
- Select an existing service request record in the grid list and then click Open.

Figure 3—Request Form



Attributes Tab

Note: *The data fields on the Attributes tab become read-only after a request has been submitted.*

Contacts

Requester. If the current user is an active Evolve Occupant, their name will automatically populate this field.

Requested For. If the current user is requesting this service for someone other than themselves, they can enter the first few letters of the contact's *first name* into the text box and a selection list (derived from the Evolve Contacts list) will populate with all contact matches. The user can then choose a name from the selection list.

Note: *The Requested For text box is active only when the search icon*  *is displayed.*

Location

If the current user is an Evolve Occupant assigned to a property, building, floor, and/or space within Evolve, the Location information will automatically populate with the user's assigned location information, however the location data can be changed as needed.

Property. (Required) Select the property related to this Request.

Building. Use to identify a building on the selected property.

Floor. Use to identify a floor of the selected building.

Space. Use to identify a space on the selected floor.

Asset. Use to identify an asset related to this Request.

Location. Use to enter a more descriptive location description.

Classification

Request Category. Use to assign a Request Category.

Request Class. Use to assign a Request Class.

Job. Use to assign a Job type.

Request

- **Description** - (Required) Enter a description of the service requested.
- **Detail** - Use to enter more detail about this request.

Additional Detail

The Additional Detail section of the form displays custom data fields associated with the Job that is assigned to a request. Use the Additional Data fields to enter job specific data related to the request.

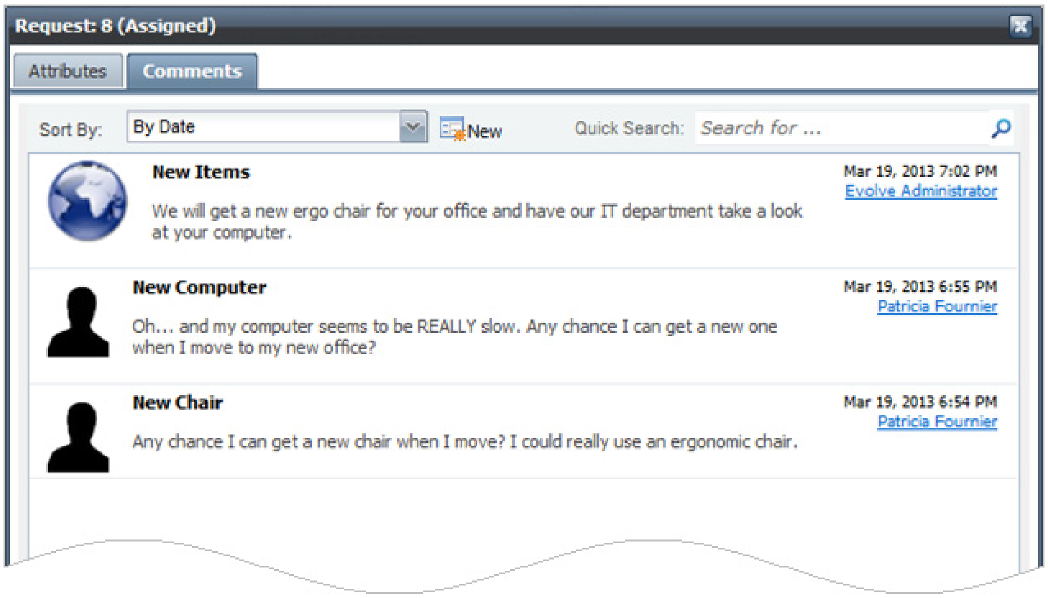
Note: *The Additional Detail section will not be displayed if a Job has not been assigned to the request, or if a job assigned to the request is not configured with additional detail data fields.*

Comments Tab

The Comments tab is used to add and display comments related to a request.

Note: *Comments cannot be edited or removed after they have been added to the Comments tab.*

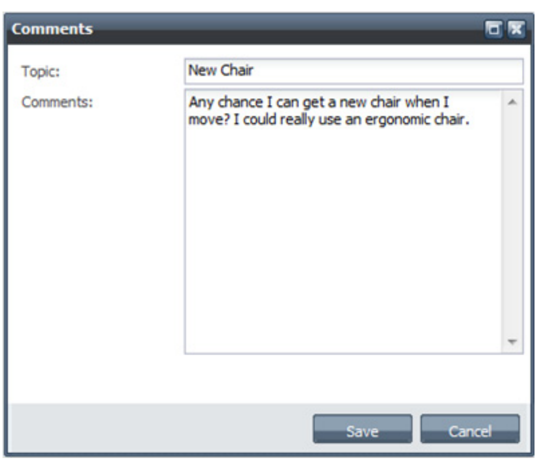
Figure 4—Comments Tab



To add a new comment:

1. Click the New button located on the Comments tab.
2. On the Comments form, enter the comment Topic. The topic appears in bold text on the comment tab.
3. In the Comments text field, enter a comment. The comment appears beneath the topic on the comments tab.

Figure 5—Comments Form



Note: *The date the comment was added, and an email link to the user who created the comment, is automatically added to the comment tab.*

Note: *Comments cannot be edited or removed after they have been added to the Comments tab.*

Managing Requests

Submit a New Request

1. Log into Evolve using your User Name and Password.
2. If you have been given privileges to other modules in Evolve, click the Requester icon on the desktop to open the Requester component.
3. On the Requester grid, click Add to display the Request form.
4. In the Location list, select a Property from the pick list (required).

Note: *NOTE: If you are an occupant in Evolve and are currently assigned to a Property, Building, Floor, and/or Space, your location data will automatically populate the location fields.*

5. Enter a description of your request in the Description text box (required).
6. Fill in any other data fields as needed.
7. Click Save.

Note: *Once the request has been saved, all data fields on the Attributes tab become read-only and no changes can be made to the request.*

View an Existing Request

1. Log into Evolve using your User Name and Password.
2. If you have been given privileges to other modules in Evolve, click the Requester icon on the desktop to open the Requester component.
3. In the Request grid list, select the request you want to open.
4. Click Open.

Note: *All data fields on the Attributes tab are read-only and other than comments, no changes can be made to existing requests.*

Add a Comment to a Request

1. On the Comments tab of the Request form, click New to display the Comments form.
2. In the Topic text box enter the topic of your comment (required).

Note: *The topic will appear in bold text on the Comments tab.*

3. In the Comments text area, enter your comment (optional).

Note: *The description will appear below the topic text on the Comments tab.*

4. Click Save.

Note: *Comments cannot be edited or removed after they have been added to the Comments tab.*

3: Service Requests

Service Requests Grid

Service Request Form

Managing Service Requests

Service Request Grid

The Service Request grid located in both the Call Center component and the Maintenance component, displays a list of all Service Requests submitted by all Requester, Call Center, and Maintenance users.

Use the service request grid to:

- Retrieve a list of all service requests
- Add a new service request record
- Open the Service Request form to a specific service request record

Note: *Once created, a service request will remain in the Service Request grid until its related work order status changes to Closed. Once closed, the service request will be removed from the grid list.*

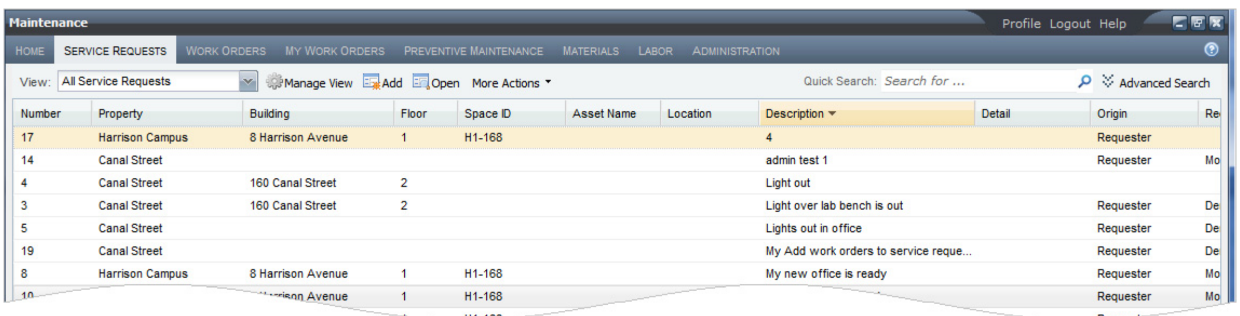
To display the service request grid:

1. Do either of the following:

- Double-click the Maintenance icon on the EvolveFM desktop.
- Double-click the Call Center icon on the EvolveFM desktop.

2. Click the Service Requests tab.

Figure 1—Service Request Grid (Maintenance Component)



Activity Feed (Call Center Component)

The Activity Feed located to the left of the Call Center Service Request grid, displays a read-only list of all activity related to all service requests in EvolveFM.

Figure 2—Activity Feed

Service Request form

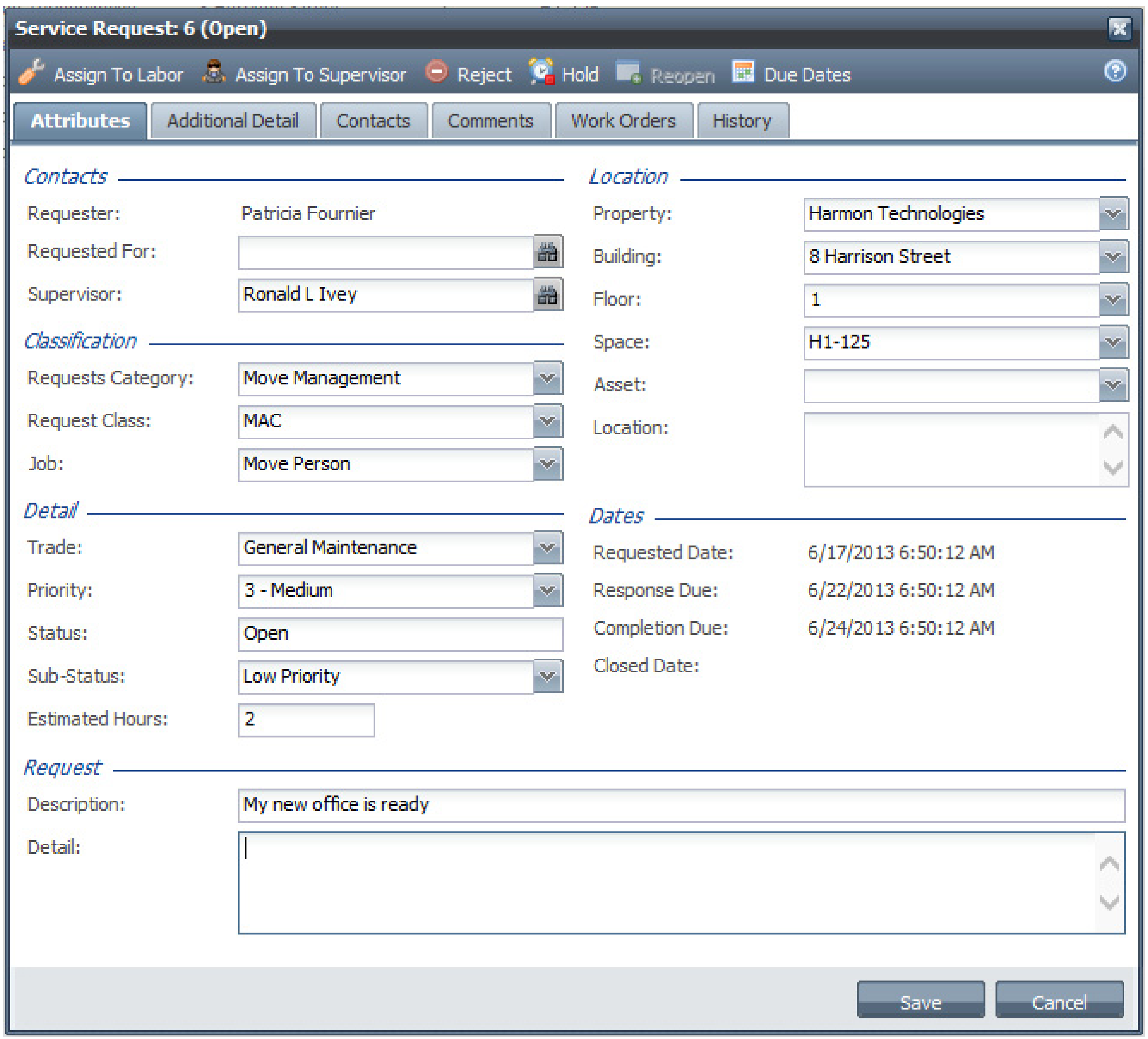
The Service Request form is used to manage service requests in EvolveFM.

To display the service request form:

1. In either the Maintenance component or the Call Center component, click the Service Requests tab.
2. Do one of the following:

- Click Add to open the Service Request form to a new record.
- Select an existing service request record in the grid list and then click Open.

Figure 3—Service Request form



Attributes Tab

Contacts

Requester. If the current user is an active Evolve Occupant, their name will automatically populate this field.

Requested For. If the current user is requesting this service for someone other than themselves, they can enter the first few letters of the contact's *first name* into the text box and a selection list (derived from the Evolve Contacts list) will populate with all contact matches. The user can then choose a name from the selection list.

Supervisor. If the Assign to Supervisor button is used to assign the service request to a labor supervisor, this field will automatically populate with the selected supervisor's name. The user can also enter the first few letters of a supervisor's *first name* into the text box and a selection list (derived from the Evolve Labor list) will populate with all labor supervisor matches. The user can then choose a name from the selection list.

Note: *The Requested For and Supervisor text box are active only when the search icon is displayed.*

Location

If the current user is an Evolve Occupant assigned to a property, building, floor, and/or space within Evolve, the Location information will automatically populate with the user's assigned location information, however the location data can be changed as needed.

Property. (Required) Select the property related to this Request.

Building. Use to identify a building on the selected property.

Floor. Use to identify a floor of the selected building.

Space. Use to identify a space on the selected floor.

Asset. Use to identify an asset related to this Request.

Location. Use to enter a more descriptive location description.

Note: *The Location data fields become read-only when a service request enters an Assigned status state.*

Classification

Request Category. Use to assign a Request Category.

Request Class. Use to assign a Request Class.

Job. Use to assign a Job type.

Note: *The Classification data fields become read-only when a service request enters an Assigned status state.*

Detail

Trade. Use to assign a trade to a service request.

Note: *If your organization is utilizing the work order automation tools, this assignment may be automatically assigned by a Job.*

Priority. Use to assign a priority to a service request.

Note: *If your organization is utilizing the work order automation tools, this assignment may be automatically assigned by a Job.*

Status. The Status field displays the current status state of a service request.

Sub Status. Use to select and assign a more detailed reason for the current status of the service request.

Estimated Hours. Use to enter the estimated hours to perform the service.

Note: *If your organization is utilizing the work order automation tools, this assignment may be automatically assigned by a Job.*

Note: *The Detail data fields become read-only once the service request enters an Assigned status state.*

Dates

Requested Date. The date the service request was created (read-only).

Response Due. The Response due date is initially calculated and set by the Response Due data configured on Priority that is assigned to the service request. After the service request has been saved for the first time, the date can be changed using the Due Dates button located on the Service Request form menu.

Completion Due. The Completion due date is initially calculated and set by the Completion Due data configured on Priority that is assigned to the service request. After the service request has been saved for the first time, the date can be changed using the Due Dates button located on the Service Request form menu.

Closed Date. The date the service request is closed (read-only).

Request

Description. (Required) Use to enter a description of the service requested.

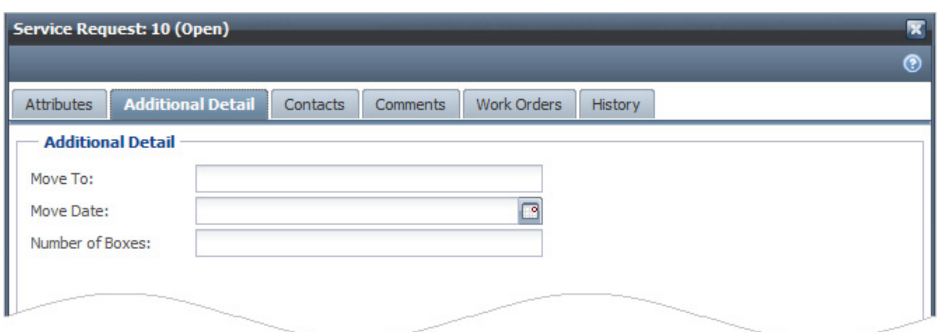
Detail. Use to enter more detail about the service request.

Note: *The Request data fields become read-only once the service request enters an Assigned status state.*

Additional Detail Tab

The Additional Detail tab displays custom data fields associated with the Job that is assigned to a service request. Use the Additional Data fields to enter job specific data related to the service request.

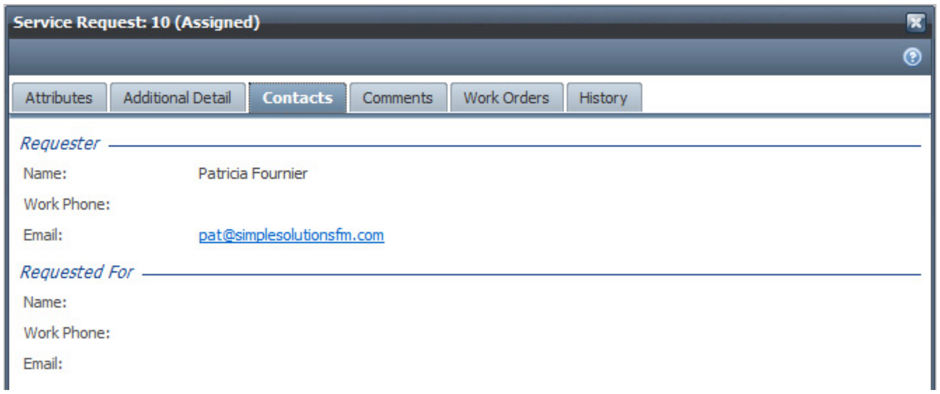
Figure 4—Additional Detail Tab, Service Request form



Contacts Tab

The Contacts tab displays contact information assigned to the people related to a service request (read-only).

Figure 5—Contacts Tab, Service Request form

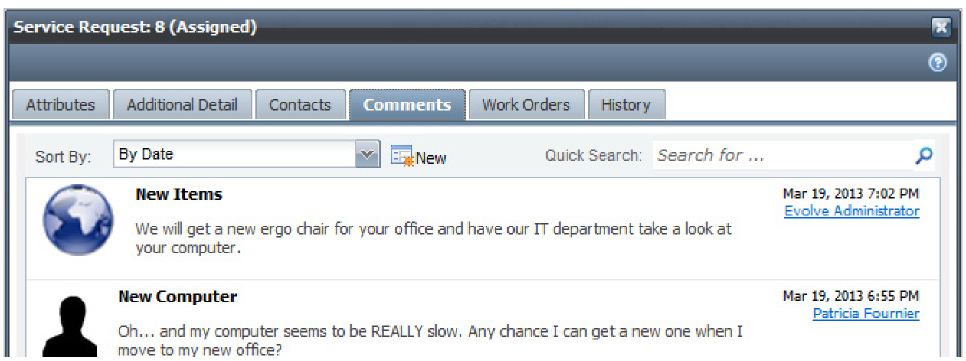


Comments Tab

The Comments tab is used to add and display comments related to a service request.

Note: *Comments cannot be edited or removed after they have been added to the Comments tab.*

Figure 6—Comments Tab, Service Request form

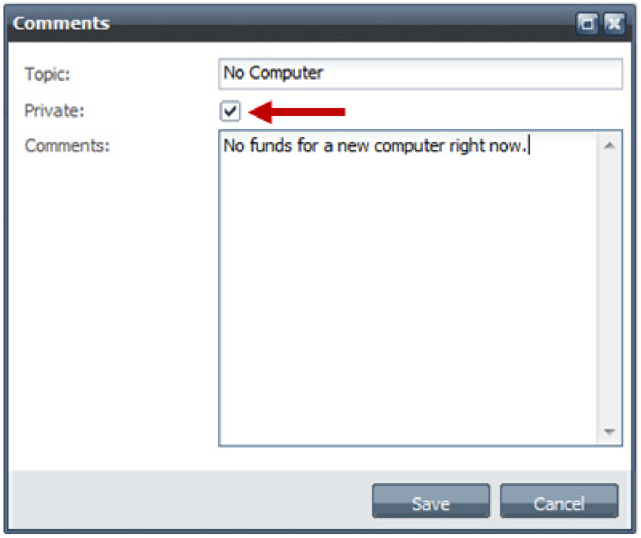


To add a new comment:

1. Click the New button located on the Comments tab.
2. On the Comments form, enter the comment Topic. The topic appears in bold text on the comment tab.
3. If needed, select the Private check box.

4. In the Comments text field, enter a comment. The comment appears beneath the topic on the comments tab.

Figure 7—Comments Form



Private Check Box. When a comment is saved with this check box selected, the comment will be visible only to the user who created the comment.

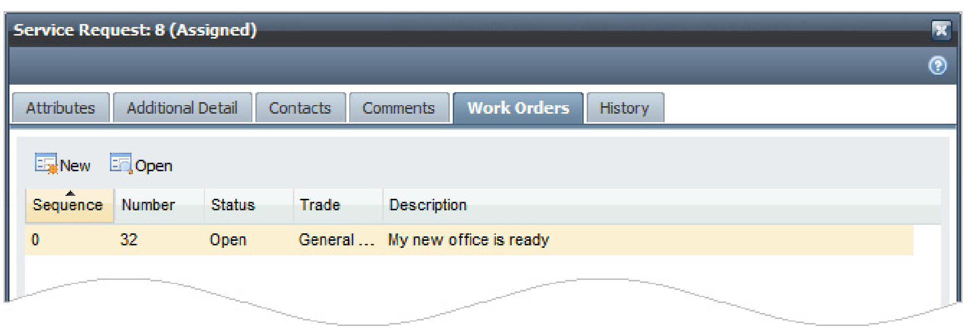
Note: *The date the comment was added, and an email link to the user who created the comment, is automatically added to the comment tab.*

Note: *Comments cannot be edited or removed after they have been added to the Comments tab.*

Work Order Tab

The Work Order tab is used to manage work orders associated with a service request.

Figure 8—Work Order Tab, Service Request form



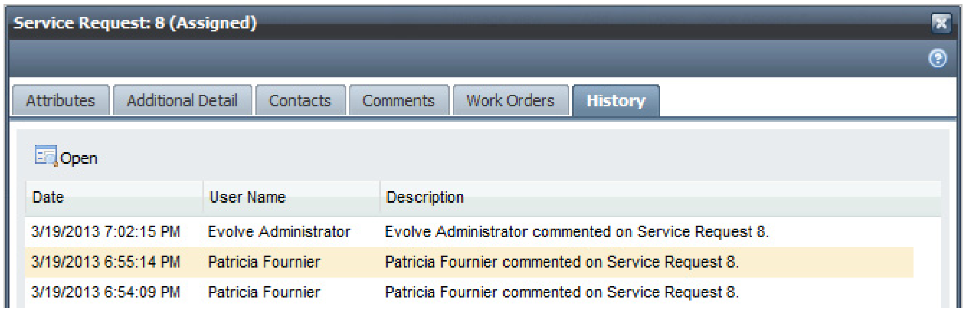
New Button. Use the New button to create a new work order against the service request.

Open Button . Use the Open button to display a work oder selected in the list.

History Tab

The History tab is used to view the activity related to a service request.

Figure 9—History Tab, Service Request form

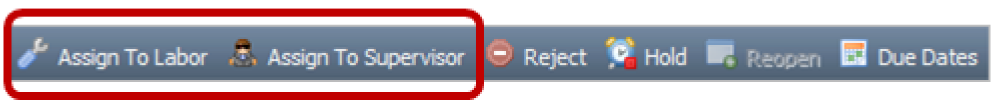


Open Button. Use the Open button to display the history record selected in the list (read-only).

Assignment Controls

The Assign To Labor and the Assign To Supervisor controls are visible on the Service Request form only when the Attributes tab is the active tab. Use the controls to assign the service request to the labor provider responsible for performing the work, or to the labor supervisor responsible for delegating the work.

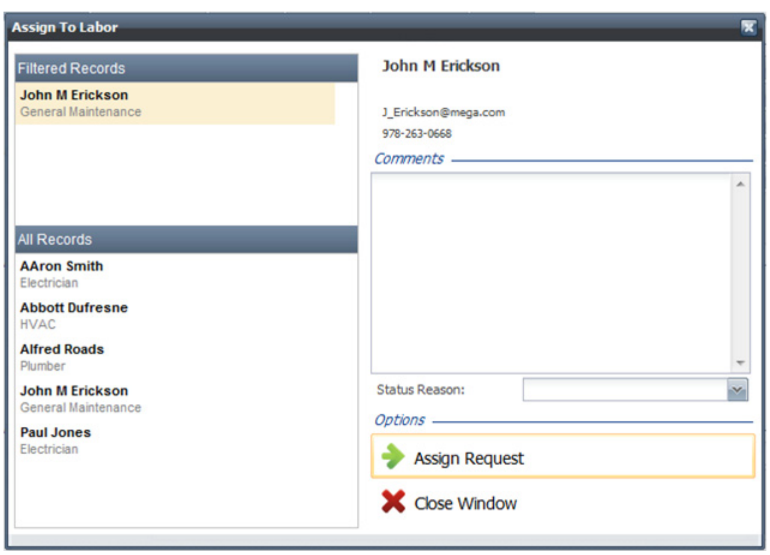
Figure 10—Assignment Controls, Service Request Form



Assign To Form

The Assign To Labor and the Assign to Supervisor controls when clicked display the Assign To form. When the form is used to assign the service request to a labor provider, a work order is generated and is given the status Assigned. When the form is used to assign the service request to a labor supervisor, a work order is generated and is given the status Open.The Assign To Labor and the Assign to Supervisor controls when clicked display the Assign To form. The

Figure 11—Assign To Form



All Records. The All Records selection list displays all Evolve labor/supervisor records along with their trade.

Filtered Records. The Filtered Records selection list filters the All Records list to display only the labor/supervisor records assigned to the same trade and same location property as assigned to the service request.

Comments. Comments entered in the Comments area are added to the Comments tab of the Service Request form.

Status Reason. The Status Reason pick list can be used to select a reason why the status has changed to Assigned.

Assign Request. Click the Assign Request option to assign the service request to the selected labor/supervisor record, and to update the service request status to Assigned.

Close Window. Click the Close Window option to cancel the assignment and close the Assign To form.

Assigned Status State

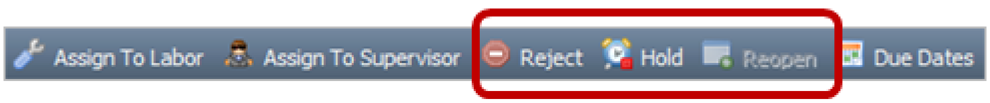
When the Assign To form is used to assign a service request to a labor provider, a work order is generated and the service request status state changes to Assigned.

Note: *When a service request is in the Assigned status state it cannot reenter any other state. The Attributes tab, the menu buttons Assign To Labor, Assign To Supervisor, Reject, Hold, and Reopen become inactive.*

Reject, Hold, Reopen Controls

The Reject, Hold, and Reopen controls are visible on the Service Request form only when the Attributes tab is the active. Use the controls to change the status state of a service request.

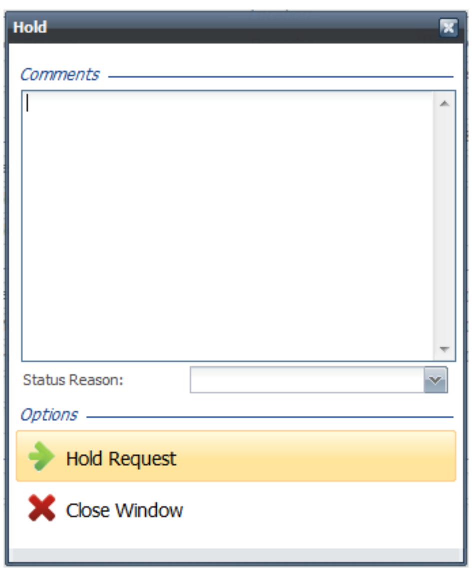
Figure 12—Reject, Hold, Reopen Buttons



Change Status Form

The Reject, Hold, and Reopen controls when clicked display the Change Status form.

Figure 13—Change Status Form (Hold status shown)



Comments. Use the Comments text box to add a comment to the Comments tab of the Service Request form.

Status Reason. The Status Reason pick list can be used to select a reason why the status has changed.

Options. Two options are provided. The first option button is the Change Status button which is used to change the status of the service request. The second option button is the Cancel button which is used to cancel the status change and close the form.

Rejected Status State

The service request Reject control is used to change the status state of a service request to Rejected.

Note: *The Attributes tab of the Service Request form, and the Assign To Labor, Assign To Supervisor, Reject, Hold, and Due Dates buttons are inactive while the request is in a Rejected status state.*

Hold Status State

The service request Hold control is used to change the status state of a service request to On Hold.

Note: *The Attributes tab of the Service Request form is inactive while the request is in an On Hold status state.*

Reopen Status State

The service request Reopen control is used to change the status state of a service request from Rejected or On Hold to Open.

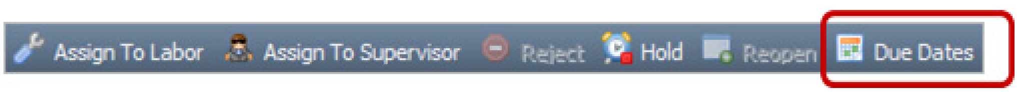
Due Dates Control

The Due Dates control is visible on the Service Request form only when the Attributes tab is the active tab.

Use the due dates control to:

- Set the service request Response Due date
- Set the service request Completion Due date

Figure 14—Due Dates Control

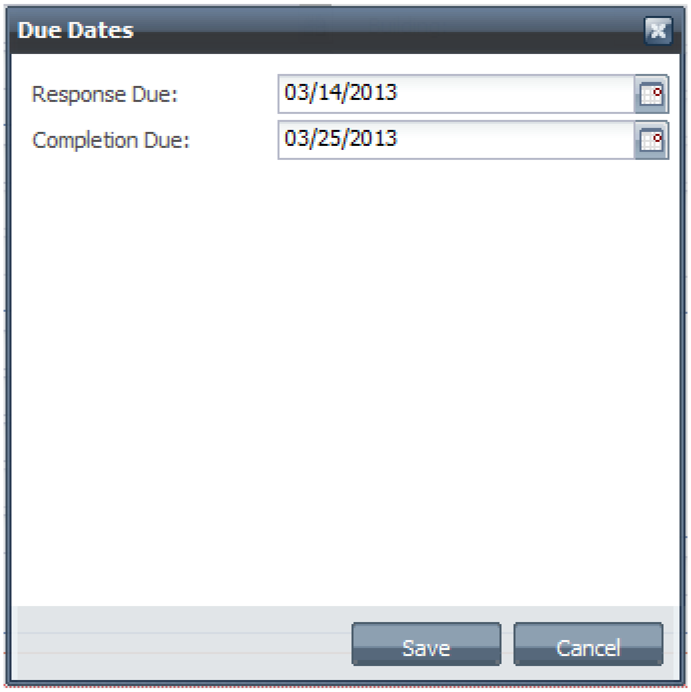


Due Dates Form

The Due Dates control located on the Service Request form is used to display the Due Dates form. Use the form to change the Response Due and the Completion Due dates for the service request.

Note: *When a service request is created, its assigned priority is used to set the Response Due and Completion Due dates and the Due Dates control is inactive. After the service request has been saved for the first time, the Due Dates control becomes active and the dates initially set by the assigned priority can be changed using the Due dates form.*

Figure 15—Due Dates Form



Managing Service Requests

Create a New Service Request

1. Open the Maintenance component.
2. On the Service Request grid, click Add to display the Service Request form.
3. In the Location list, select a Property from the pick list (required). NOTE: If you are an occupant in Evolve and are currently assigned to a Property, Building, Floor, and/or Space, the location data will automatically populate with your location data.
4. Enter a description of your request in the Description text box (required).
5. Fill in any other Service Request form fields as needed.
6. Click Save.

Display/Edit an Existing Service Request

1. Open the Maintenance maintenance component.
2. In the Service Request grid list, select the service request you want to display or edit.
3. Click Open.
4. Edit data as needed.
5. Click Save.

Generate a Work Order from a Service Request

A work order is generated from a service request at the time of labor assignment.

1. In Maintenance, display the service request that you need.
2. On the Service Request form, click either the Assign To Labor or the Assign to Supervisor button.
3. On the Assign to Labor/Supervisor form, select a labor provider from the list of providers.
4. Fill in comments and the Status Reason if needed.
5. Click Assign Request.

Hold, Reject, Reopen a Service Request

1. In Maintenance, display the service request that you need.
2. On the Service Request form do one of the following:

- Click the Hold button, and then on the Hold form click Hold Request.
- Click the Reject button, and then on the Reject form click Reject Request.
- Click the Reopen button, and then on the ReOpen form, click ReOpen Request.

View Work Orders assigned to a Service Request

1. In Maintenance, display the service request that you need.
2. On the Service Request form, click the Work Orders tab to view a list of all work orders against the request.
3. Select a work order in the list, and then click the Open button to view the Work Order form.

4: Work Orders

Generating Work Orders

Work Orders Grids

Work Order Form

Managing Work Orders

Generating Work Orders

Work orders can be generated in EvolveFM by any of the following methods:

- Automatically when a service request is assigned to labor
- Manually using the Work Order form
- Automatically when a Preventive Maintenance activity is triggered by its assigned schedule

Work Order Grids

The two work order grids in EvolveFM, Work Orders and My Work Orders, allow you to use the security tools in EvolveFM to choose which work order grid(s) you make available to specific users.

Note: *Once created, a work order cannot be removed from the Work Order grid list.*

Work Orders Grid

The Work Orders grid displays a list of all work orders in EvolveFM.

My Work Orders Grid

The My Work Orders grid displays a list of all work orders assigned to the current user.

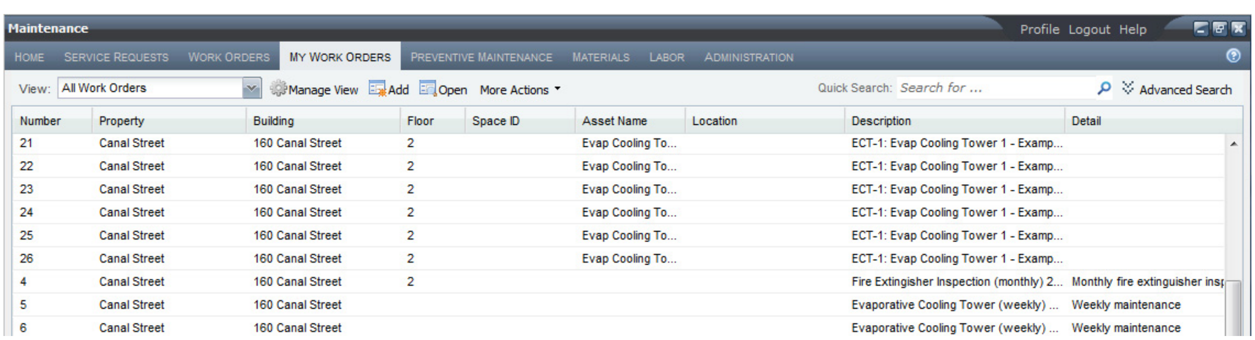
Use the work order grid to:

- Retrieve a list of all work orders
- Add an new work order
- Open the Work Order form to a specific work order record
- Print a work oder
- Print all work orders
- Print/Export the grid list

To display a work order grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click Work Orders or click My Work Orders.

Figure 1—My Work Orders Grid



Work Order Form

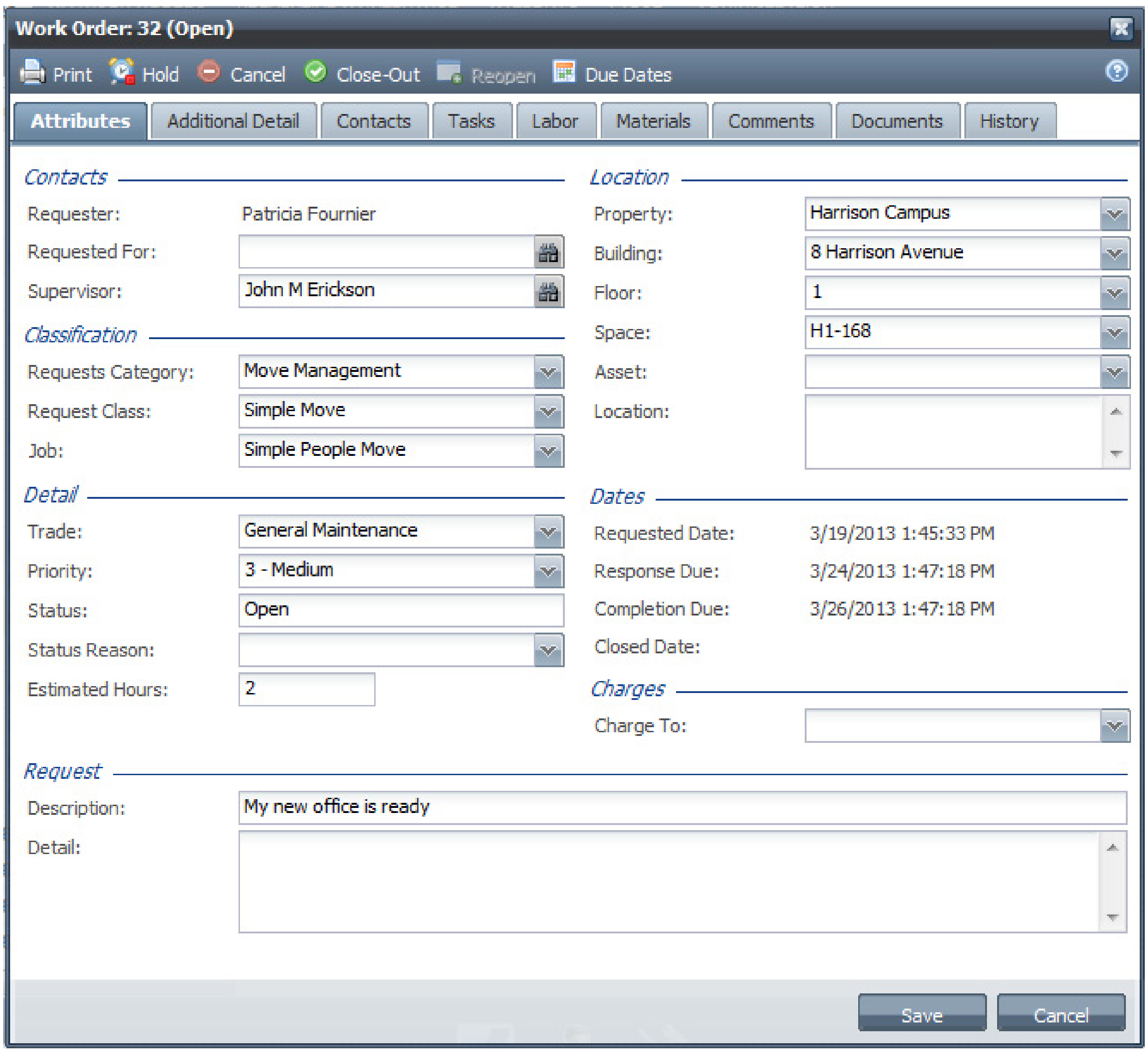
The Work Order form is used to manage work orders in EvolveFM.

To open the work order form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Work Orders (or My Work Orders).
3. Do one of the following:

- Click Add to open the Work Order form to a new record.
- Select a work order record in the grid list and then click Open.

Figure 2—Work Order Form



Attributes Tab

Contacts

Requester. If the current user is an active Evolve Occupant, their name will automatically populate this field.

Requested For. If the current user is requesting this work for someone other than themselves, they can enter the first few letters of the contact's *first name* into the text box and a selection list (derived from the Evolve Contacts list) will populate with all contact matches. The user can then choose a name from the selection list.

Supervisor. Use to assign the work order to a labor supervisor. Enter the first few letters of a supervisor's *first name* into the text box and a selection list (derived from the Evolve Labor list) will populate with all labor supervisor matches. The user can then choose a name from the selection list.

Location

If the current user is an Evolve Occupant assigned to a property, building, floor, and/or space within Evolve, the Location information will automatically populate with the user's assigned location information, however the location data can be changed as needed.

Property. (Required) Select the property related to this work order.

Building. Use to identify a building on the selected property.

Floor. Use to identify a floor of the selected building.

Space. Use to identify a space on the selected floor.

Asset. Use to identify an asset related to this work order.

Location. Use to enter a more descriptive location description.

Classification

Request Category. Use to assign a Request Category.

Request Class. Use to assign a Request Class.

Job. Use to assign a Job type.

Detail

Trade. Use to assign a trade to a work order.

Note: *If your organization is utilizing the work order automation tools, this assignment may be automatically assigned by a Job.*

Priority. Use to assign a priority to a work order.

Note: *If your organization is utilizing the work order automation tools, this assignment may be automatically assigned by a Job.*

Status. The Status field displays the current status state of a work order.

Sub Status. Use to select and assign a more detailed reason for the current status of the work order.

Estimated Hours. Use to enter the estimated hours to perform the work.

Note: *If your organization is utilizing the work order automation tools, this assignment may be automatically assigned by a Job.*

Dates

Requested Date. The date the work was requested (read-only).

Response Due. The Response due date is initially calculated and set by the Response Due data configured on Priority that is assigned to the work order. After the work order has been saved for the first time, the date can be changed using the Due Dates button located on the Work Order form menu.

Completion Due. The Completion due date is initially calculated and set by the Completion Due data configured on Priority that is assigned to the work order. After the work order has been saved for the first time, the date can be changed using the Due Dates button located on the Work Order form menu.

Closed Date. The date the work order is closed (read-only).

Charges

Charge To. Use to assign the business unit to be billed for the charges associated with the work.

Request

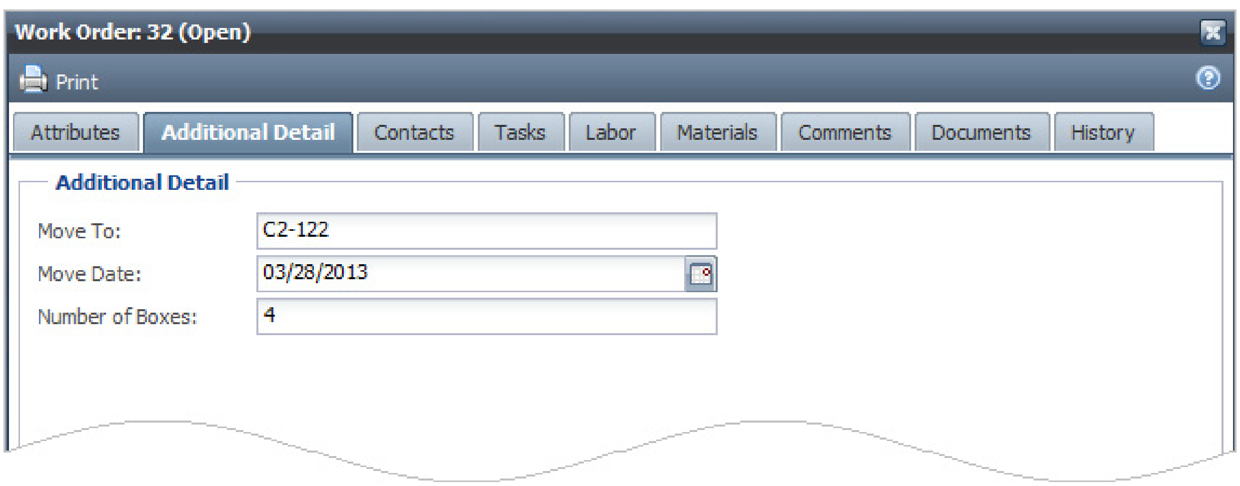
Description. (Required) Use to enter a description of the work order.

Detail. Use to enter more detail about the work.

Additional Detail Tab

The Additional Detail tab displays custom data fields associated with the Job that is assigned to a work order. Use the Additional Data fields to enter job specific data related to the work.

Figure 3—Additional Detail Tab, Work Order Form



Contacts Tab

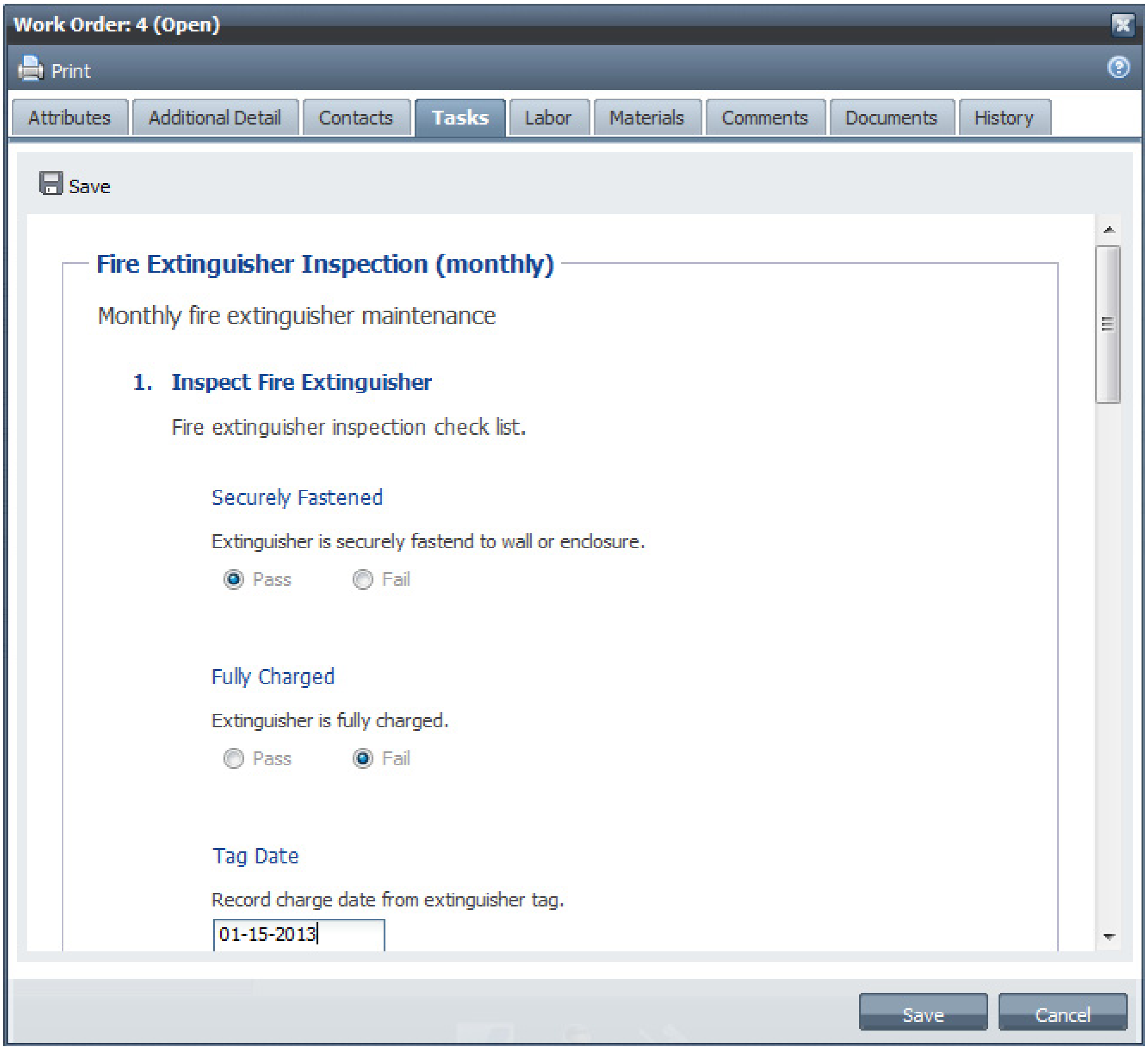
The Contacts tab displays contact information assigned to the people related to a work order (read-only).

Task Tab

The Task tab displays tasks, steps, and readings that are associated with a job assigned to the work order, or with Preventive Maintenance tasks associated to the work order.

Use the Task tab to enter the data collected while completing the work.

Figure 4—Task Tab, Work Order Form



Save Tasks Button

Use the Save Tasks button located at the top left of the Task tab to save your task data entries.

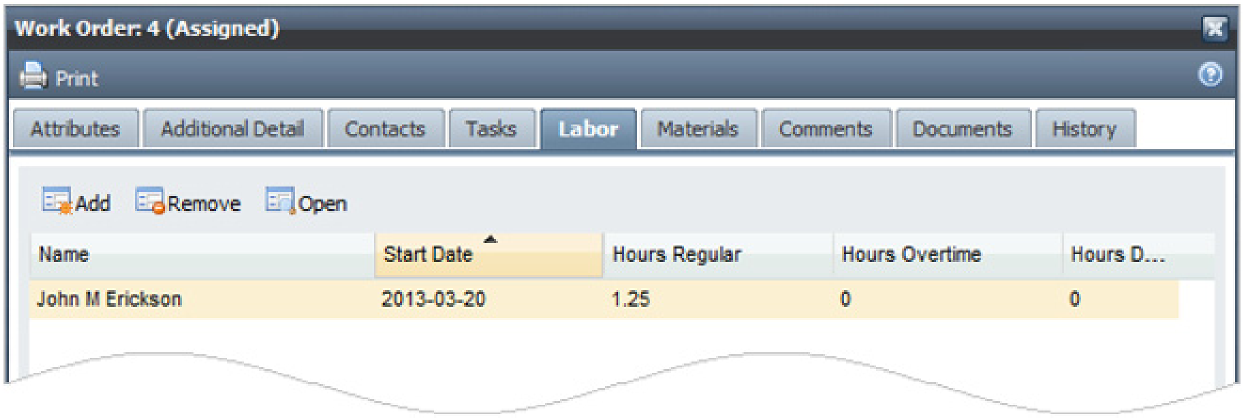
Figure 5—Task Save Button

Note: *Using the Work Order Save button located at the bottom of the Work Order form will not save data entered into fields on the Tasks tab. You must use the Save Tasks button to save task data.*

Labor Tab

Use the labor tab to manage labor assigned to a work order.

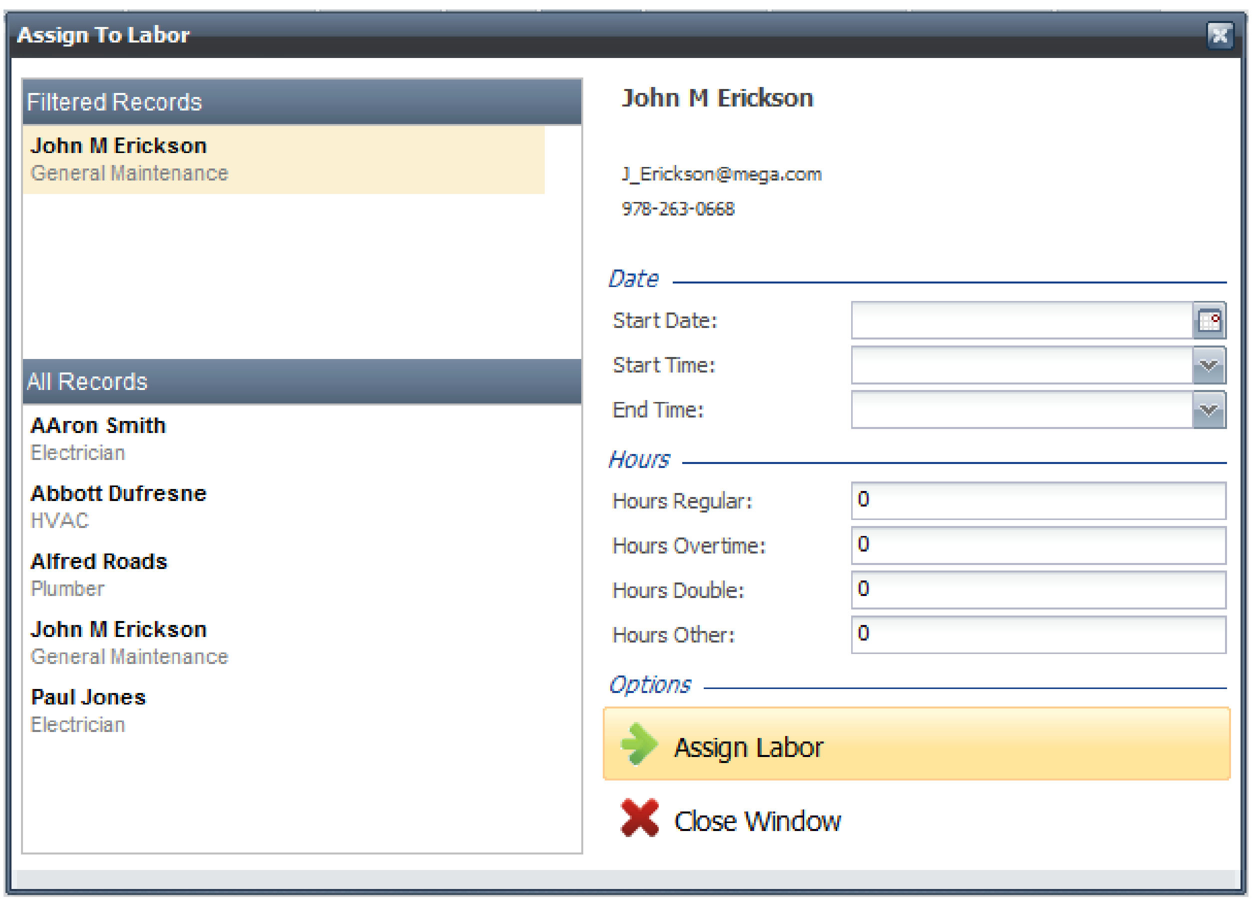
Figure 6—Labor Tab, Work Order Form



Assign To Labor Form

The Add button located on the Labor tab is used to assign labor providers to the work order. When the Add button is clicked, the Assign To Labor form displays.

Figure 7—Work Order Assign To Labor Form



All Records. The All Records selection list displays all Evolve labor records along with their trade.

Filtered Records. The Filtered Records selection list filters the All Records list to display only the labor records assigned to the same trade and same location property as assigned to the work order.

Date. Use the date fields as needed to enter the start date, start time, and end time for the labor provider.

Hours. Use the hour fields as needed to enter the number of hours the labor provider worked.

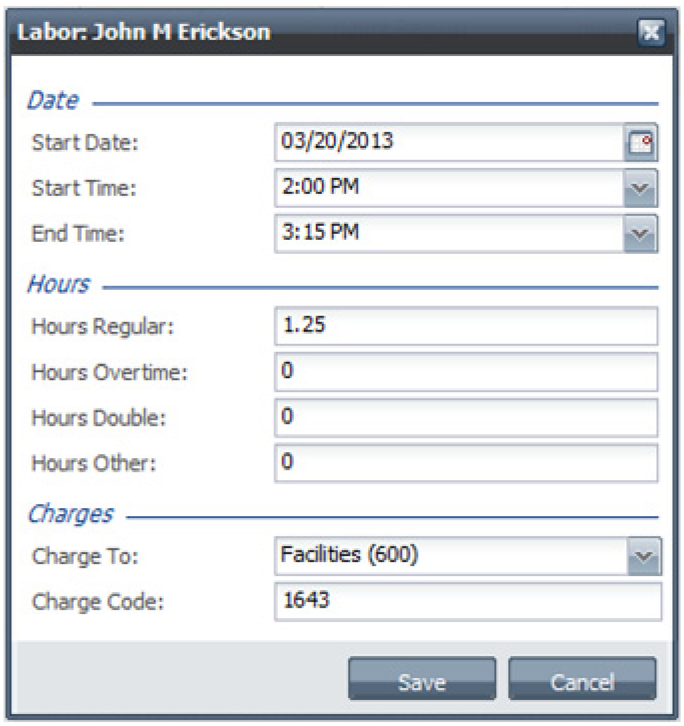
Assign Labor. Click the Assign Labor option to assign the selected labor provider to the work order.

Close Window. Click the Close Window option to cancel the assignment and close the Assign To Labor form.

Labor Time Form

The Open button located on the Labor tab, is used to open the Labor Time form for the selected labor provider. Use the form to enter the labor provider's start date, start and end times, hours worked, and charge information.

Figure 8—Labor Form



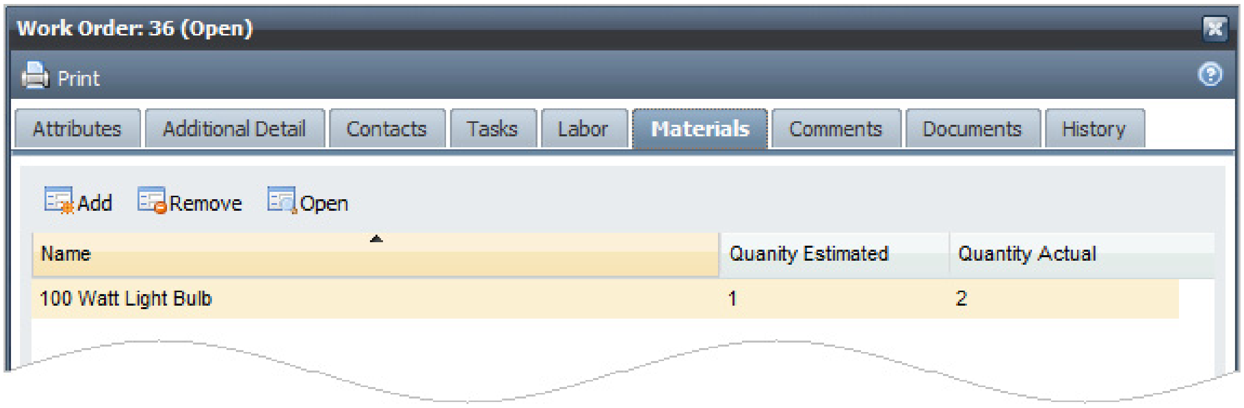
Remove Labor

The Remove button located on the Labor tab, is used to remove the selected labor provider from the work order.

Materials Tab

The Materials tab is used to manage materials associated with a work order.

Figure 9—Materials Tab, Work Order Form



Add. Use to add a material record(s) to the Materials tab.

Remove. Use to remove a selected material record(s) from the Materials tab.

Open. Use to open and display a selected materials record.

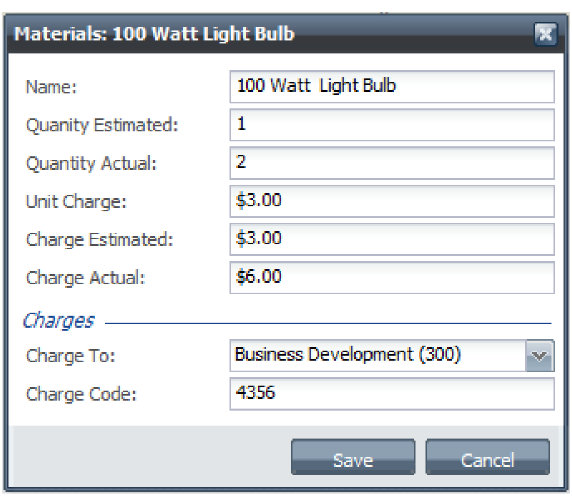
Material Quantity/Charge Form

The Open button located on the Materials tab, is used to open the Material Quantity/Charge form to the selected material record. Use the form to enter a material's quantity, price, and charge information as it relates to the work order.

To display the Work Order Materials form:

1. On the Materials tab, select a material record in the list.
2. Click the Open button to display the Materials Quantity/Charge form.

Figure 10—Materials Quantity/Charge Form



Remove Material

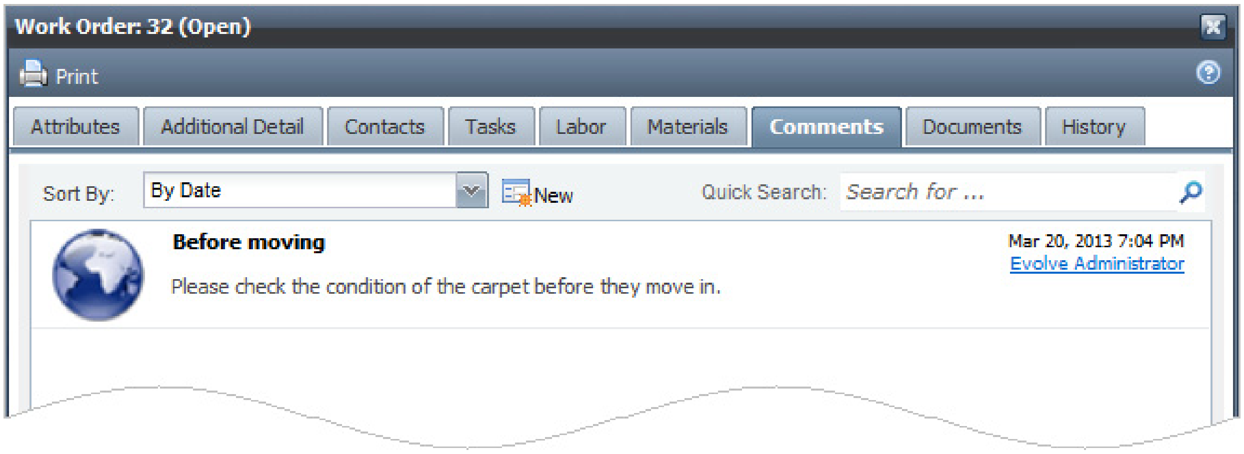
The Remove button located on the Materials tab, is used to remove a selected material from the work order.

Comments Tab

The Comments tab is used to add and display comments related to a work order.

Note: *Comments cannot be edited or removed after they have been added to the Comments tab.*

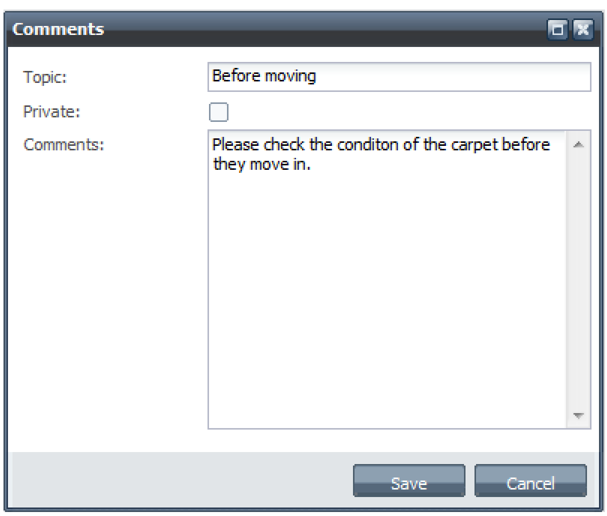
Figure 11—Comments Tab, Work Order Form



To add a new comment:

1. Click the New button located on the Comments tab.
2. On the Comments form, enter the comment Topic. The topic appears in bold text on the comment tab.
3. If needed, select the Private check box.
4. In the Comments text field, enter a comment. The comment appears beneath the topic on the comments tab.

Figure 12—Comments Form



Private Check Box. When a comment is saved with this check box selected, the comment will be visible only to the user who created the comment.

Note: *The date the comment was added, and an email link to the user who created the comment, is automatically added to the comment tab.*

Note: *Comments cannot be edited or removed after they have been added to the Comments tab.*

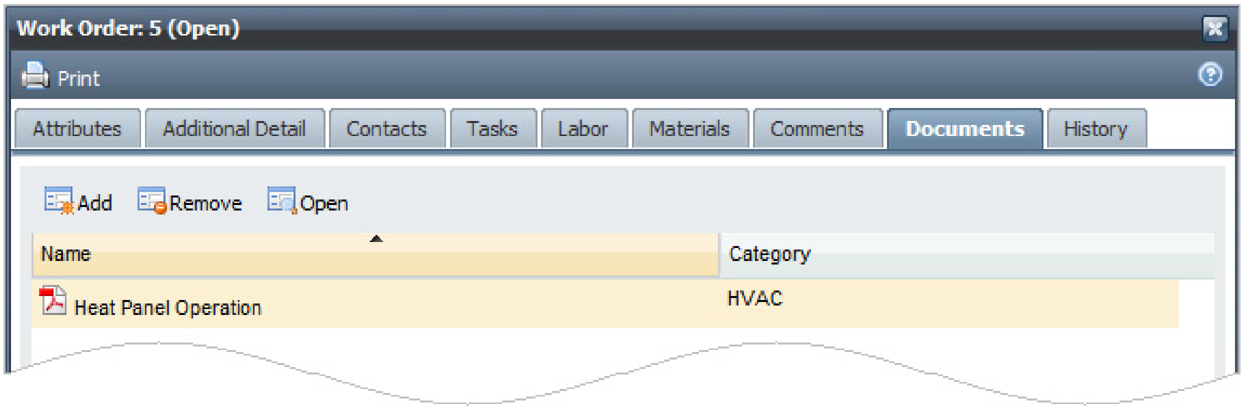
Documents Tab

The Documents tab is used to manage documents associated with a work order.

Note: *Documents must exist in Evolve before they can be added to the Documents tab.*

Note: *Documents do not automatically print when the work order is printed.*

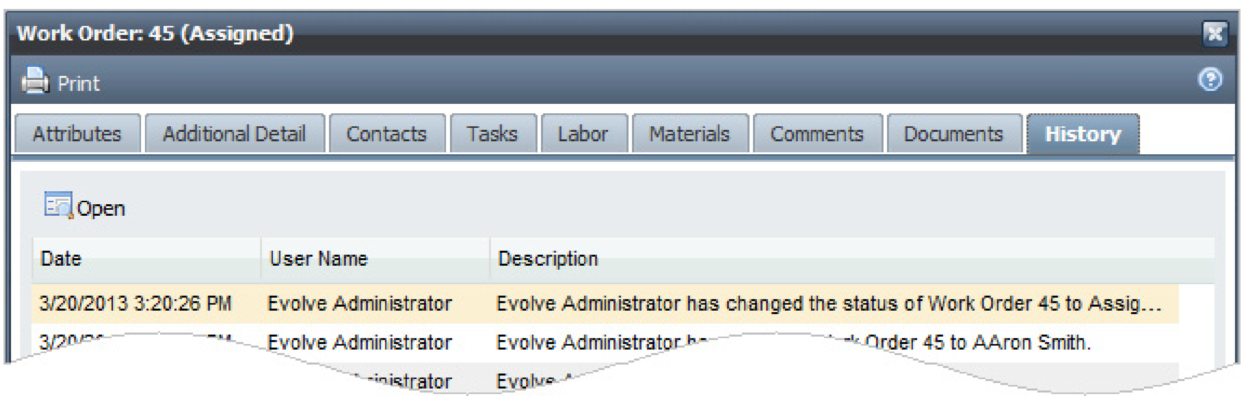
Figure 13—Documents Tab, Work Order Form



History Tab

The History tab is used to view the activity history related to a work order.

Figure 14—History Tab, Work Order Form

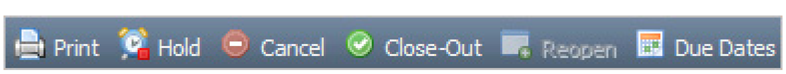


Open Button. The Open button located on the History tab, is used to display the selected history record.

Work Order Controls

The work order controls are visible on the Work Order form when the Attributes tab is selected, with the exception of the Print control which is visible at all times.

Figure 15—Work Order Form Controls



Use the work order controls to:

- Print the Work Order Detail report
- Change the status of a work order (hold, cancel, closed)
- Reopen a work order after it has been on hold, canceled, or closed
- Manage the work order due dates

Hold, Cancel, Reopen Status Controls

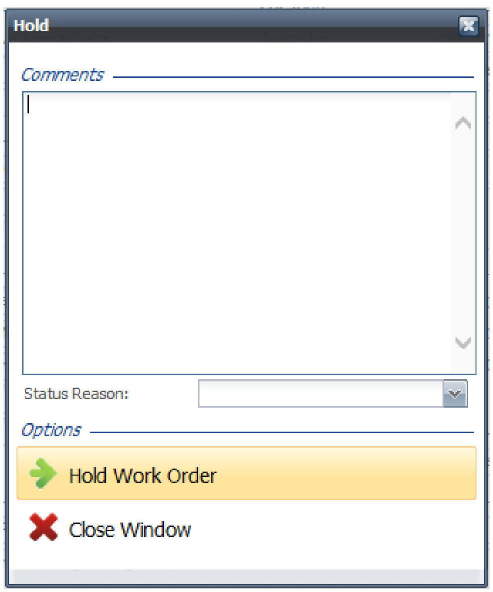
The work order Hold, Cancel, and Reopen controls are used to change the status state of a work order.

Note: *The Attributes tab of the Work Order form is inactive when a work order status state is Hold or Canceled.*

Change Status Form

The Hold, Cancel, and Reopen controls when clicked display the Change Status form.

Figure 16—Change Status Form (Hold status shown)



Comments. Use the Comments text box to add a comment to the Comments tab of the Work Order form.

Status Reason. The Status Reason pick list can be used to select a reason why the status has changed.

Options. Two options are provided. The first option button is the Change Status button which is used to change the status of the work order. The second option button is the Cancel button which is used to cancel the status change and close the form.

Due Dates Control

The Due Dates control is used to change the Response Due and Completion Due dates of a work order.

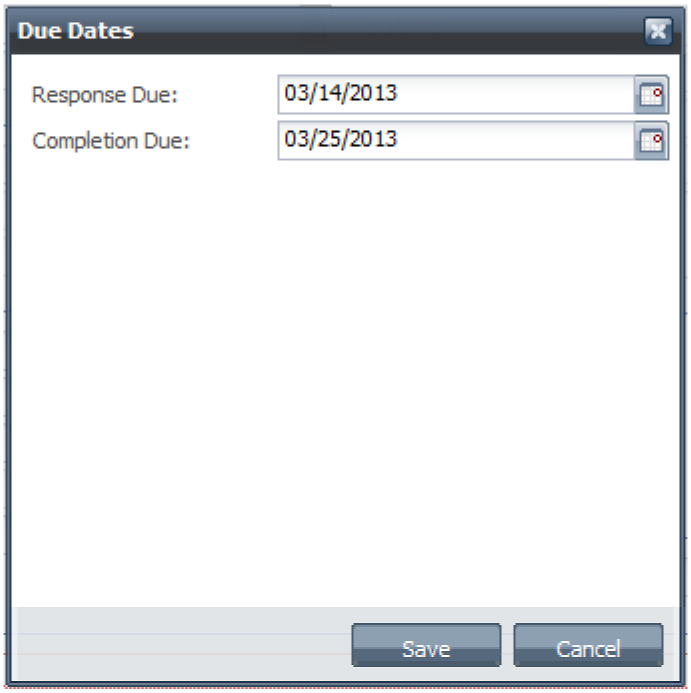
Note: *The Due Dates control is visible on the Work Order form when the Attributes tab is selected.*

Due Dates Form

The Due Dates form is displayed when the Due Dates control located on the work order form is clicked. Use the form to change the Response Due and the Completion Due dates for the work order.

Note: *When a work order is created, its assigned priority is used to set the Response Due and Completion Due dates and the Due Dates control is inactive. After the work order has been saved for the first time, the Due Dates control becomes active and the dates initially set by the assigned priority can be changed using the Due dates form.*

Figure 17—Due Dates Form



Close-Out Control

The Close-Out control located on the Work Order form, is used to change the work order status state to Closed.

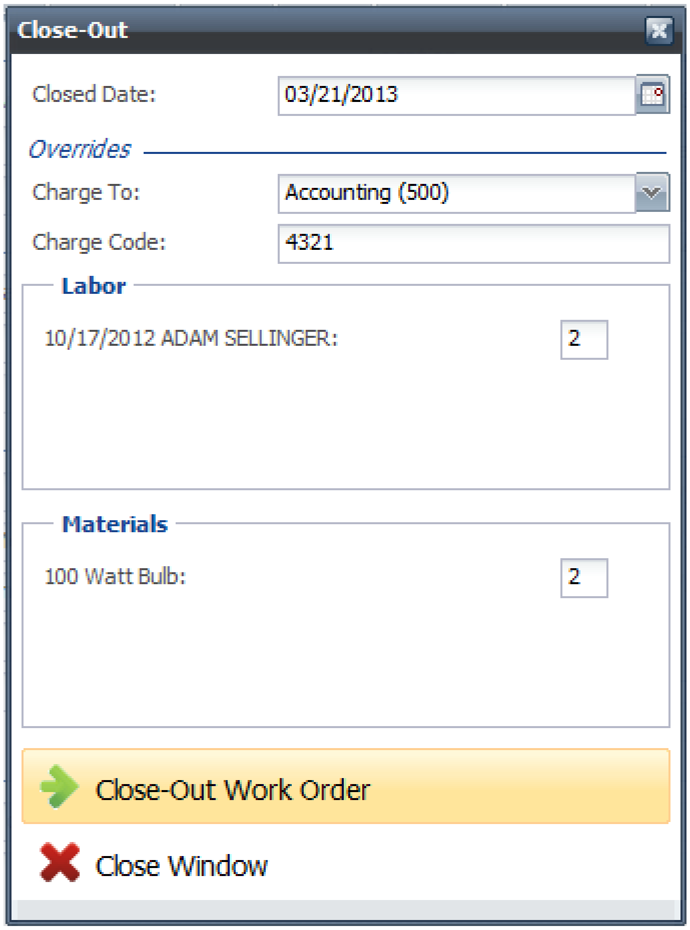
Close-Out Form

The Close-Out form is displayed when the work order Close-Out control is clicked.

Use the form to:

- Enter the date the work order was closed.
- Charge the work order to a single business unit, overriding all other Charge To assignments configured on the work order.
- Record the labor hours used for each labor provider assigned to the work order.
- Record the material quantities used for each material assigned to the work order.

Figure 18—Close-Out Form



Closed Date. Use the Closed Date field to enter the date the work order was closed.

Charge To. Use the Override Charge To pick list to choose a business unit responsible for the work order charges. The business unit selected will override all other Charge To assignments configured on the work order

Charge Code. Use the Charge Code text box to assign a charge code to the work order. The Charge Code entered here will override all other Charge Code assignments configured on the work order.

Labor. The Labor section of the form is used to enter the total number of hours worked for each labor provider.

Materials. The Materials section of the form is used to enter the quantity of each material used.

Close-Out Work Order. Click the Close-Out Work Order button to update the work order status to Closed.

Close Window. Click the Close Window option button to cancel the status change and close the form.

Print Control

The Print control located on the Work Order form, is used to open the work order detail report in PDF format.

Managing Work Orders

Create a New Work Order

1. Open the Maintenance component.
2. Click Work Orders (or My Work Orders).
3. On the Work Order grid list, click Add to display the Work Order form.
4. In the Location list, select a Property from the pick list (required). NOTE: If the Requester is an occupant in Evolve and they are currently assigned to a Property, Building, Floor, and/or Space, the location data will automatically populate with their location data.
5. Enter a description of your request in the Description text box (required).
6. In the Priority pick list, choose a priority for the work. (The the Response Due and Completion Due dates will be calculated based on the priority selected.)
7. Use the Labor tab to add the labor provider(s).
8. Fill in any other Work Order form fields as needed.
9. Click Save.

Print a Work Order

From the Work Order form

1. On the Work Order form, click Print.

From the Work Order grid

1. In the Work Order grid list, select the work order you want to print.
2. Click More Actions, and then click Print Selected

Display/Edit an Existing Work Order

1. Open the Maintenance component.
2. Select Work Orders (or My Work Orders).
3. In the Work Order grid list, select the work order you want to display or edit.
4. Click Open.
5. Edit data as needed.
6. Click Save.

Hold, Cancel, Reopen a Work Order

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form do one of the following:

- Click the Hold button, and then on the Hold form click Hold Work Order.
- Click the Cancel button, and then on the Cancel form click Cancel Work Order.
- Click the Reopen button, and then on the Reopen form, click Reopen Request.

Complete Tasks Assigned to a Work Order

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Tasks tab.
3. Fill out the task data fields as needed.
4. Click the Task SAVE button. WARNING! Click the Task tab Save button here, not the Work Order Save button.
5. Click the Work Order Save button.

Manage Labor on a Work Order

Add Labor

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Labor tab.
3. On the Labor tab, click Add.
4. On the Assign To Labor form, select a labor provider.
5. Fill in date and time data as needed.
6. Click Assign Labor.

Edit Labor

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Labor tab.
3. On the Labor tab, select the labor record you want to edit.
4. Click Open.
5. On the Labor form, enter the date, hours, and charges as needed.
6. Click Save.

Remove Labor

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Labor tab.
3. On the Labor tab, select the labor record you want to remove from the work order.
4. Click Remove.
5. Click Yes to confirm the removal.

Manage Material on a Work Order

Add Material

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Materials tab.
3. On the Materials tab, click Add.
4. On the Select Materials form, select the material record(s) that you want to add.

5. Click Save.

Edit Material

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Materials tab.
3. On the Materials tab, select the material record you want to edit.
4. Click Open.
5. On the Materials form, enter the data as needed.
6. Click Save.

Remove Material

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Materials tab.
3. On the Materials tab, select the material record you want to remove from the work order.
4. Click Remove.
5. Click Yes to confirm the removal.

Manage Documents on a Work Order

Note: *Documents do not automatically print when the work order is printed.*

Add Document

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Documents tab.
3. On the Documents tab, click Add.
4. On the Select Documents form, select the Evolve document record(s) that you want to add.

Note: *Documents must exist in Evolve before they can be added to the Documents tab.*

5. Click Save.

Open a Document

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Documents tab.
3. On the Documents tab, select the document record you want to open.
4. Click Open.
5. On the Document form, click the Preview tab. TIP: Click the form’s maximize button to expand the preview area.

Remove a Document

1. In Maintenance, display the Work Order that you need.
2. On the Work Order form, click the Documents tab.
3. On the Documents tab, select the document record you want to remove from the work order.

4. Click Remove.
5. Click Yes to confirm the removal.

5: Priorities

About Priorities

Priority Grid

Priority Form

Managing Your Priority List

About Priorities

Maintenance Priorities are used to:

- Identify the importance of a service request or work order. Examples include Emergency, High, Medium, Low
- Set the initial Response Due and Completion Due dates on a new service request or work order

Default Priority Record

The default priority record in EvolveFM is initially configured as the Medium priority record (3 - Medium). If a user does not assign a priority to a service request or work order, the default priority record will be assigned automatically when the service request or work order is saved.

Can the default priority be edited?

All data in the default priority record can be edited and configured to meet your specific needs.

Can the default priority be removed?

Yes, but it is not recommended. If you remove the default priority record from the Priority grid list you will loose the ability to edit the data stored in the record. The data that existed in the record before it was removed will continue to be used as the default priority data in Evolve. Because of this, it is recommended that you do not remove the default priority record from the Priority grid.

Response Due / Completion Due Controls

When a priority is assigned to a service request or work order, the Response Due and Completion Due controls configured on the Priority form are used to calculate and set the initial Response Due and Completion Due dates of the service request or work order.

- If a user does not assign a priority to a service request or work order, the Evolve Medium priority will be assigned by default when the service request or work order is initially saved.
- Once set by the priority, the dates on the service request or work order cannot be changed until after the service request or work order has been saved for the first time.
- After the initial save of a service request or work order, the Response Due and Completion Due dates on the service request or work order can be changed using the Due Dates control located on the Service Request and Work Order forms.

Note: *A priority can be automatically assigned to a service request or work order if your organization is utilizing the Job tier of the Request Classification Hierarchy.*

Priority Grid

The Priority grid located in Maintenance Administration, is used to manage the list of maintenance priorities used in your organization. There are several default priorities configured in Evolve, however you can add, edit, or remove priority records as needed.

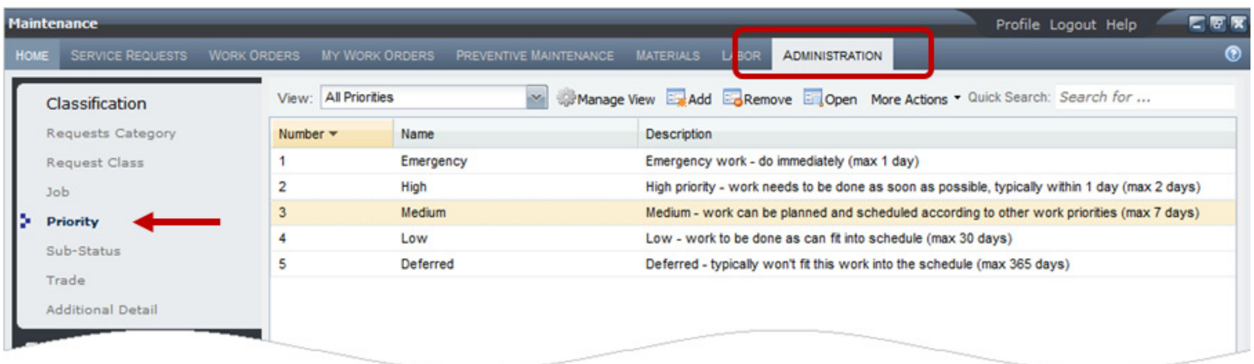
Use the priority grid to:

- Retrieve a list of all priorities
- Add a new priority record
- Open the Priority form to a specific priority record

To display the priority grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Priority.

Figure 1—Priority Grid List



Priority Form

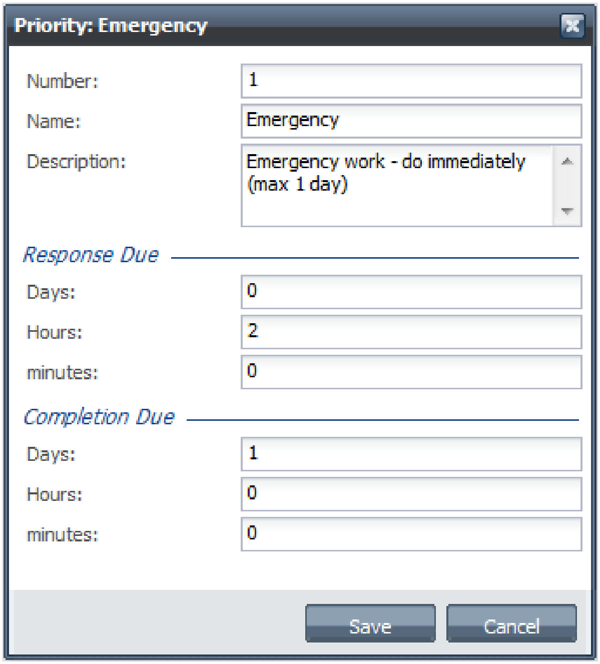
The Priority form is used to configure priority records in EvolveFM.

To display the priority form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Priority to display the Priority grid.
4. Do one of the following:

- Click Add to open the Priority form to a new record.
- Select an existing priority record in the grid list and then click Open.

Figure 2—Priority Form



Number. Use to identify the importance of the priority record (numeric entry only).

Name. Enter the name of the priority (required).

Description. Enter a description of the priority.

Response Due

When a priority is assigned to a service request or work order, the Response Due data entered here will be added to the service request or work order requested date to calculate and set the initial Response Due date for the service request or work order.

Days. Enter the number of days a response to a service request or work order is due when assigned this priority.

Hours. Enter the number of hours a response to a service request or work order is due when assigned this priority.

Minutes. Enter the number of minutes a response to a service request or work order is due when assigned this priority.

Completion Due

When a priority is assigned to a service request or work order, the Completion Due data entered here will be added to the service request or work order requested date to calculate and set the initial Completion Due date for the service request or work order.

Days. Enter the number of days expected to complete a service request or work order when assigned this priority.

Hours. Enter the number of hours expected to complete a service request or work order when assigned this priority.

Minutes. Enter the number of minutes expected to complete a service request or work order when assigned this priority.

Managing Your Priority List

Display the Priority grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Priority.

Add a new Priority record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Priority.
3. Click the Add button on the Priority grid list to open the Priority form.
4. In the Number text box, enter the priority number (required).
5. In the Name text box, enter the name of the priority.
6. In the Description text box, enter a description of the priority.
7. To automate the Response due date, complete the Response Due data fields and needed.
8. To automate the Completion due date, complete the Completion Due data fields as needed.
9. Click Save.

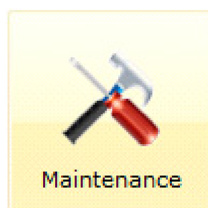
Edit a Priority record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Priority.
3. In the Priority grid list, click the priority record to be edited.
4. Click the Open button on the Priority grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Priority record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Priority.
3. In the Priority grid list, click the priority record to be removed.
4. Click the Remove button on the Priority grid list.

6: Sub-Status



About Sub-Status

Sub-Status Grid

Sub-Status Form

Managing Your Sub-Status List

About Sub-Status

A Sub-Status can be used to provide a reason why a service request or work order is in its current status state. For example, if the current status state of a work order is REJECTED, a sub-status of NO BUDGET might be appropriate.

Sub-Status Grid

The Sub-Status grid located in Maintenance Administration, is used to manage the list of sub-status records used in your organization. There are several default sub-status records configured in Evolve, however you can add, edit, or remove sub-status records as needed.

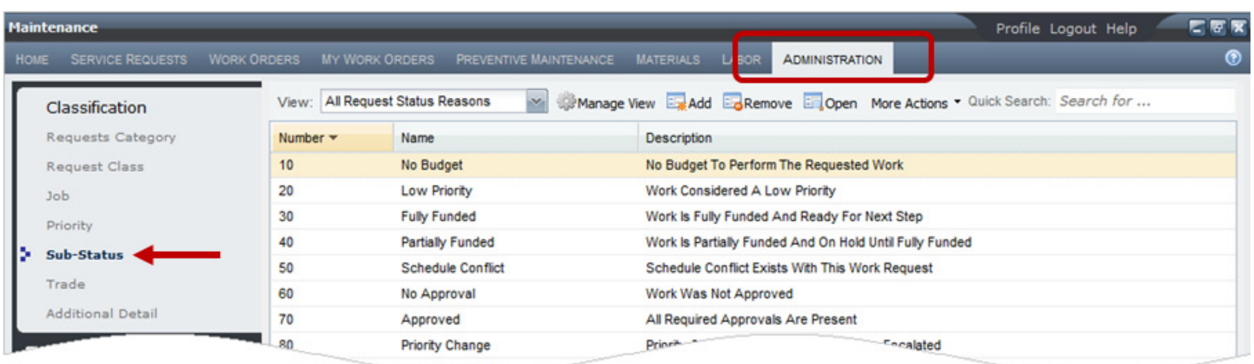
Use the sub status grid to:

- Retrieve a list of all sub-status records
- Add a new sub-status record
- Open the Sub-Status form to a specific sub-status record

To display the sub status grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Sub-Status.

Figure 1—Sub-Status Grid List



Sub-Status Form

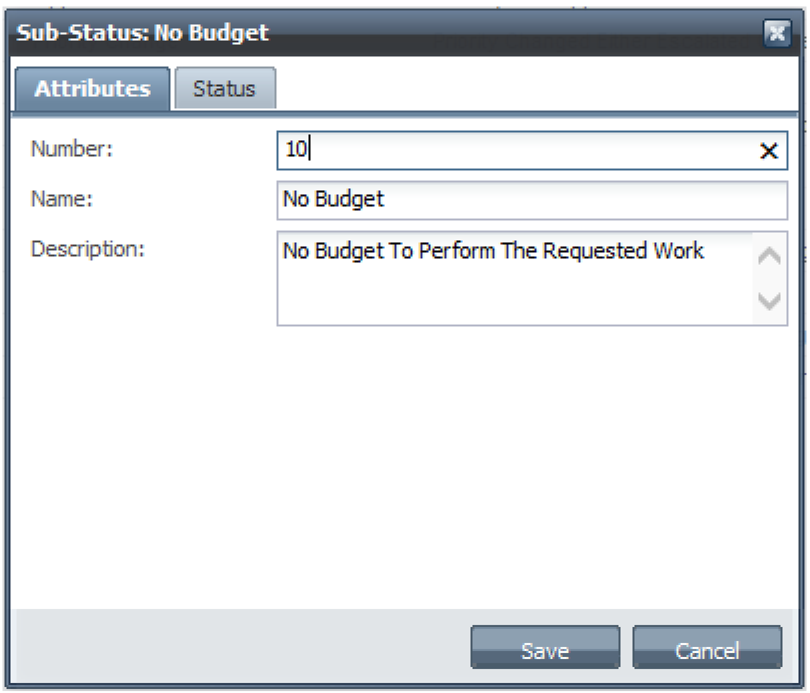
The Sub-Status form is used to configure sub-status records in EvolveFM.

To display the sub-status form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Sub-Status to display the Sub-Status grid.
4. Do one of the following:

- Click Add to open the Sub-Status form to a new record.
- Select an existing sub-status record in the grid list and then click Open.

Figure 2—Sub Status Form



Attributes Tab

Number. The number field is used to itemize your sub-status list (required, numeric entry only).

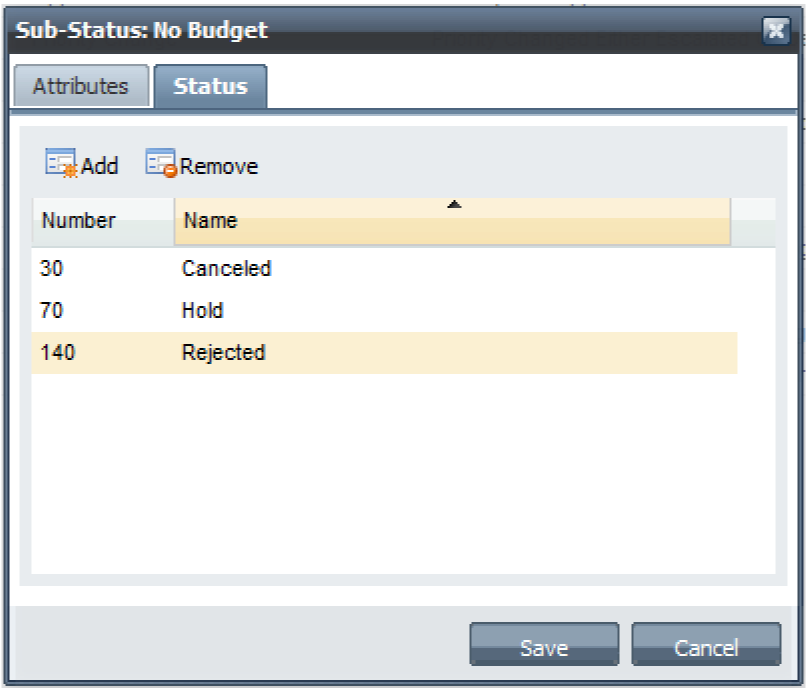
Name. Use to define the name of the Sub-Status.

Description. Use to enter a description of the Sub-Status.

Status Tab

Use to assign the Sub-Status to one or more Status states. The sub-status will be availble for selection only when a service request or work order enters one of the status states listed here on the Status tab. In the example shown below the sub-status NO BUDGET will only be available for selection when the tatus of a service request or work order is CANCELED, HOLD, or REJECTED.

Figure 3—Status Tab, Sub-Status Form



Add. Use the Add button to open the Select form and select the Status records to be assigned to the Sub-Status.

Remove. Use the Remove button to remove a selected Status record from the Status tab.

Managing Your Sub-Status List

Display the Sub-Class grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Sub-Status.

Add a new Sub-Status record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Sub-Status.
3. Click the Add button on the Sub-Status grid list to open the Sub-Status form.
4. In the Number text box, enter the sub-status number (required).
5. In the Name text box, enter the name of the sub-status.

6. In the Description text box, enter a description of the sub-status.
7. Click the Status tab, and then click Add.
8. On the Select form, select the Status states to be assigned to this sub-status record and then click Save.
9. Click Save.

Assign a Sub-Status record to a Status

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Sub-Status.
3. Do one of the following:

- Click the Add button on the Sub-Status. grid list to open the Sub-Status form to a new record.
- In the Sub-Status grid list, click a sub-status record and then click Open to open an existing record.

4. Click the Status tab, and then click Add.
5. On the Select form, select the Status states to be assigned to the sub-status record and then click Save.
6. Click Save.

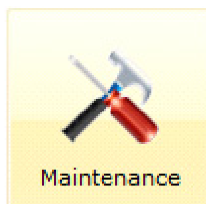
Edit a Sub-Status record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Sub-Status.
3. In the Sub-Status grid list, click the sub-status record to be edited.
4. Click the Open button on the Sub-Status grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Sub-Status record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Sub-Status.
3. In the Sub-Status grid list, click the sub-status record to be removed.
4. Click the Remove button on the Sub-Status grid list.

7: Trades



About Trades

Trade Grid

Trade Form

Managing Your Trade List

About Trades

Trades are used to:

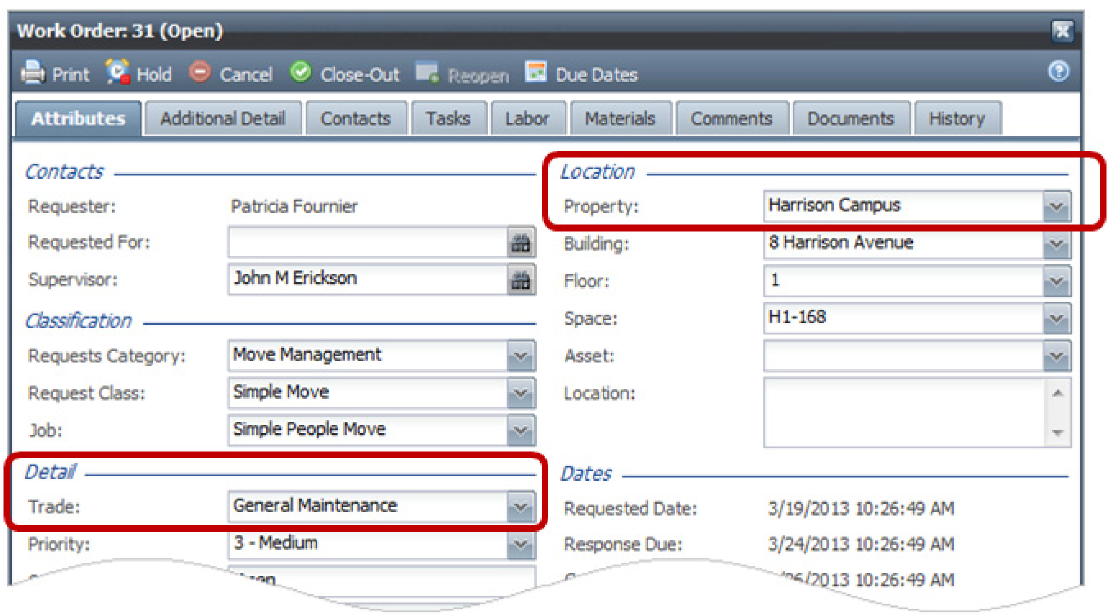
- Identify the skill(s) of a labor provider EX: HVAC, Plumber, Mechanic
- Filter the service request and work order labor selection lists
- Automatically assign labor to a work order when a trade is assigned to a Job

Use Trades to Filter Labor Selection

Trade assignment can be used to filter the labor selection list when the following two conditions apply:

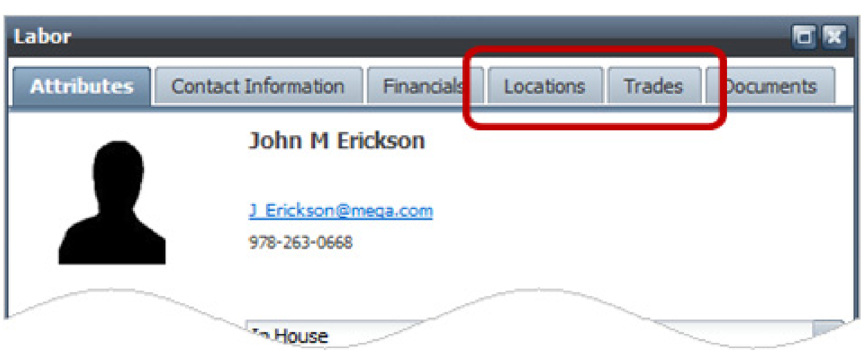
1. The trade assigned to a service request or work order must match a trade assigned to a labor provider.
2. The property location assigned to the service request or work order must match the property location assigned to the labor provider with the matching trade.

Figure 1—Work Order Form, Trade and Property Location Assignment Fields



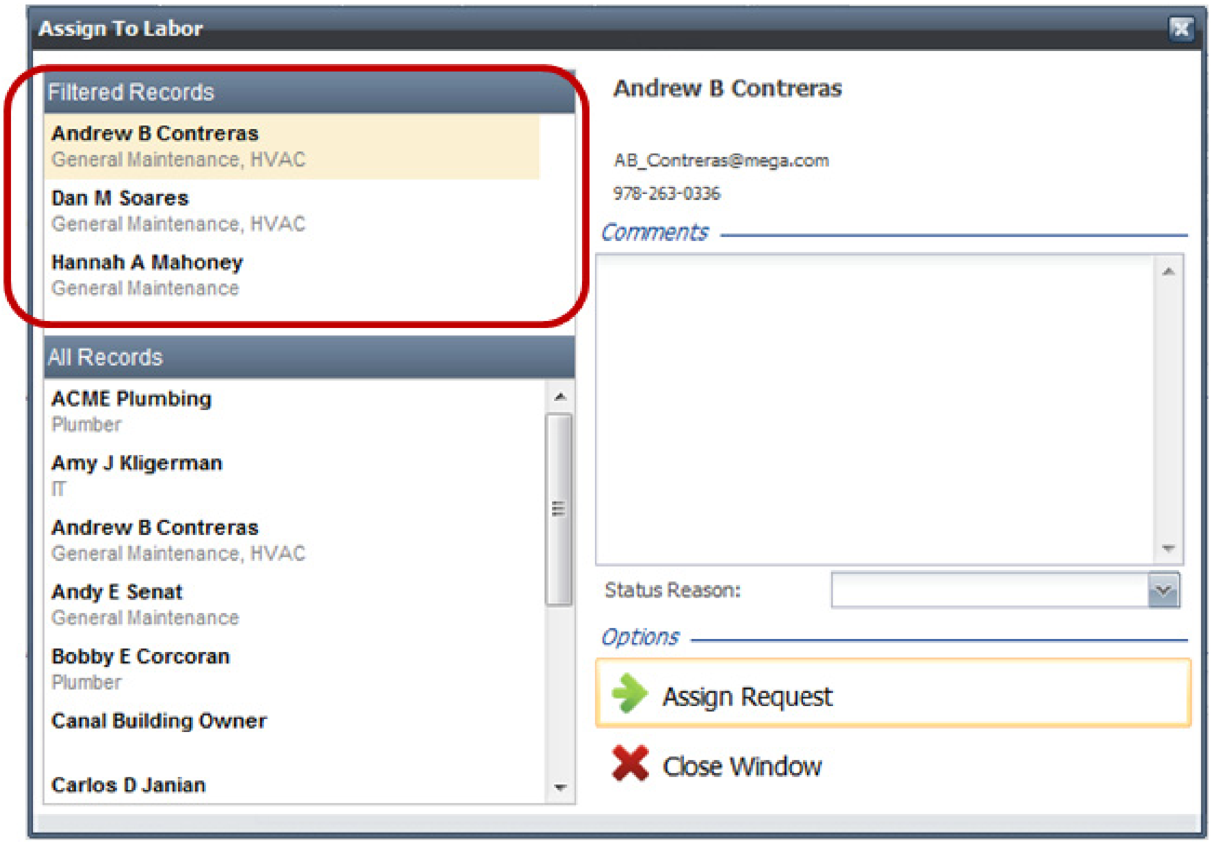
Note: *In order to filter labor selection, the trade AND the property location assigned to the service request or work order must match the trade and the property location assigned to a labor record.*

Figure 2—Labor form, Location and Trade Assignment Tabs



Upon labor assignment of the service request or work order, the Filtered Records section of the Assign To form will be filtered to display a list of all labor records that match the trade and property location assignments set on the service request or work order form.

Figure 3— Assign to Labor Form



Trade Grid

The Trade grid located in Maintenance Administration, is used to manage the list of maintenance trades used in your organization. There are several default trades configured in Evolve, however you can add, edit, or remove trade records as needed.

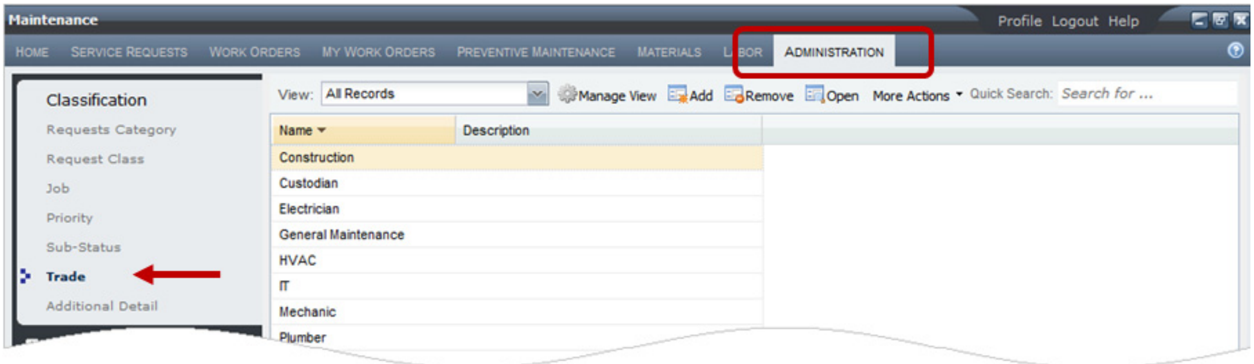
Use the trade grid to:

- Retrieve a list of all trades
- Add a new trade record
- Open the Trade form to a specific trade record

To display the trade grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Trade.

Figure 4—Trade Grid



Trade Form

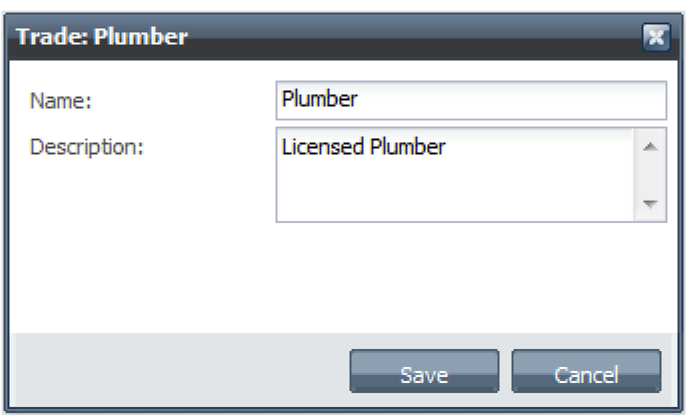
The Trade form is used to configure trade records in EvolveFM.

To display the trade form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Trades to display the Trade grid.
4. Do one of the following:

- Click Add to open the Trade form to a new record.
- Select an existing trade record in the grid list and then click Open.

Figure 5—Trade Form



Trade Form Controls

Name. Use to identify the trade record (required).

Description. Use to enter a description of the trade.

Managing Your Trade List

Display the Trade grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Trade.

Add a new Trade record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Trade.
3. Click the Add button on the Trade grid list to open the Trade form.
4. In the Name text box, enter the trade name (required).
5. In the Description text box, enter a description of the trade.
6. Click Save.

Edit a Trade record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Trade.
3. In the Trade grid list, click the trade record to be edited.
4. Click the Open button on the Trade grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Trade record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Trade.
3. In the Trade grid list, click the trade record to be removed.
4. Click the Remove button on the Trade grid list.

8: Request Classification

The Request Classification Hierarchy Structure

Request Category

Request Class

Job

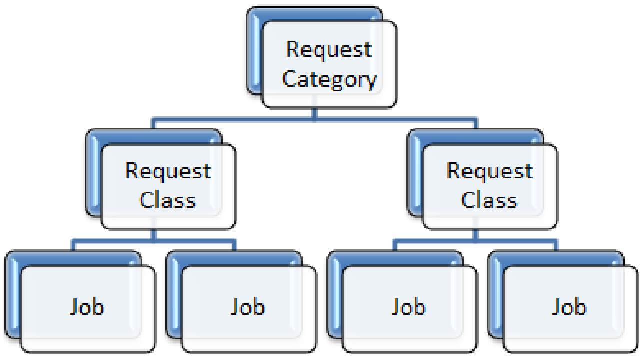
Additional Detail

The Request Classification Hierarchy Structure

The work request classification hierarchy can be used to classify work orders for organization, reporting, and work order automation purposes. The three tiers of the hierarchy include:

- Request Category
- Request Class
- Job

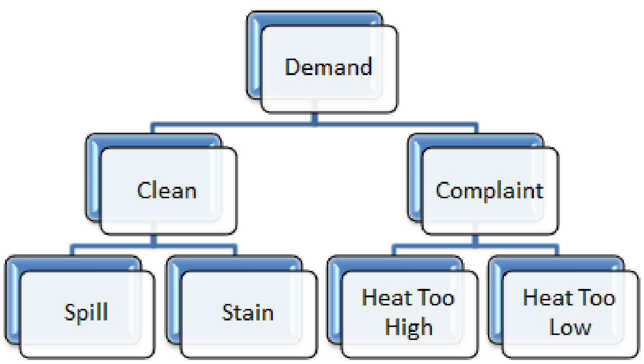
Figure 1—Classification Hierarchy



Parent/Child Relationship

The top tier of the hierarchy, Request Category is designed to be used first; items from the Request Class tier are then assigned to the Request Category tier. This assignment is known as a Parent/Child relationship where Request Category is the *parent* of Request Class. The Job tier is used last in the hierarchy and is the tier where work order automation set up happens. Jobs are assigned to an item in their parent tier, Request Class.

Figure 2—Classification Hierarchy Example



Each tier of the classification hierarchy, beginning with the Request Category tier, can be assigned to a Service Request or Work Order. Depending upon your maintenance needs you may choose to use all of the tiers, or you may choose to use only the top tier, however because of the parent/child relationship structure of the classification hierarchy, if you want to utilize the automation tools provided with the Job tier you must utilize its parent tier the Request Class, and its parent tier the Request Category.

Request Category

Request Category is the top tier in the work request classification hierarchy. If you choose to use the classification hierarchy to organize and classify your work requests, this tier will be used and assigned first.

The Request Category tier provides the ability to choose which Maintenance module components (Maintenance, Call Center, and Requester) a Request Category will be available for selection, allowing you to restrict the use of particular categories to selected components.

Request Category Grid

Evolve includes several predefined request categories, however you can add, edit, or remove the categories as needed.

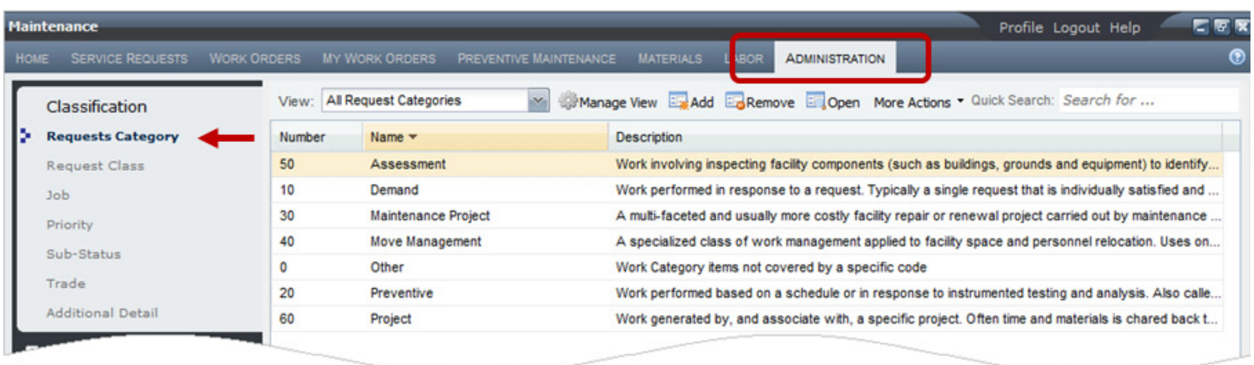
Use the request category grid to:

- Retrieve a list of all Request Categories
- Add a new Request Category record
- Open the Request Category form to a specific Request Category record

To display the request category grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Request Category.

Figure 3—Request Category Grid



About Request Category #20 Preventive

The Request Category “Preventive “ is automatically assigned to all Preventive Maintenance work orders. IMPORTANT: Changing the Name of this category will be reflected in all work orders generated by a Preventive Maintenance Routine.

Request Category Form

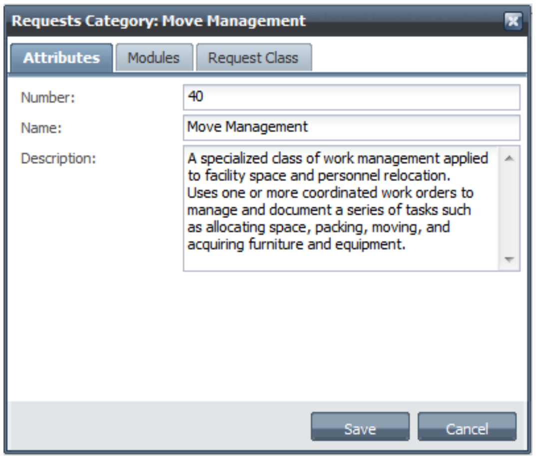
The Request Category form is used to configure request category records in EvolveFM.

To display the request category form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Request Category to display the Request Category grid.
4. Do one of the following:

- Click Add to open the Request Category form to a new record.
- Select an existing request category record in the grid list and then click Open.

Figure 4—Request Category Form, Attributes tab



Attributes Tab

Number. The number field is used to itemize your request category list (required, numeric entry only).

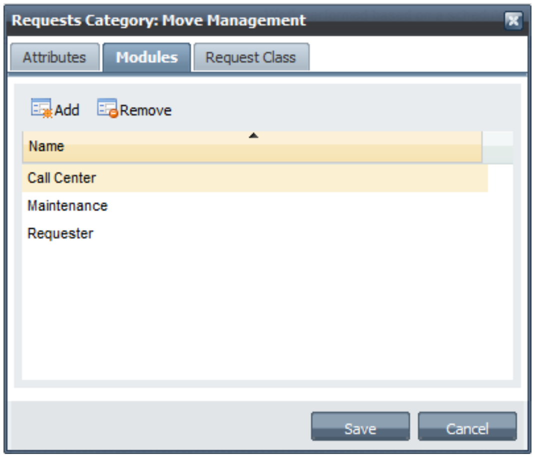
Name. Use to enter the name of the Request Category.

Description. Use to enter a description of the Request Category.

Modules Tab

The Modules tab is used to select the Maintenance module components to which you want the Request Category available for selection. For example, if you want a particular Request Category record available only to your Call Center users, you would assign only the Call Center component to the Modules tab.

Figure 5—Request Category Form, Modules Tab



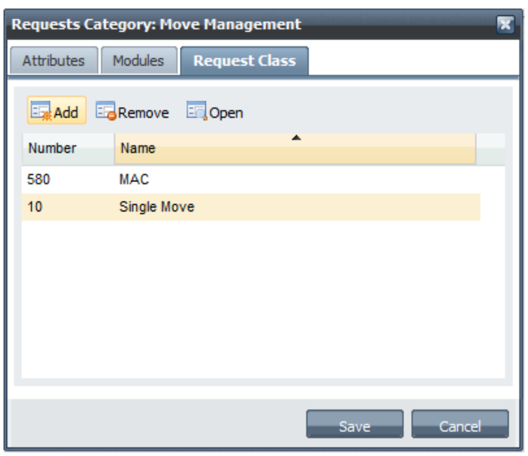
Add. Use the Add button to open the Select Modules form and select the module components to be assigned to the Request Category.

Remove. Use the Remove button to remove a selected module component from the Modules tab.

Request Class Tab

The Request Class tab is used to assign the Request Class records that you want to make available for selection when the Request Category is used. The Request Class records assigned here will be the selections available in the Request Class pick list when the Request Category is assigned to a request, service request, or work order.

Figure 6—Request Category Form, Request Class Tab



Add. Use the Add button to open the selection form and select the Request Class records to be assigned to the Request Category.

Remove. Use the Remove button to remove a selected Request Class record from the tab.

Open. Use the Open button to open the Request Class form to the selected Request Class record.

Managing Your Request Category List

Display the Request Category grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Category.

Add a new Request Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Category.
3. Click the Add button on the Request Category grid list to open the Request Category form.
4. In the Number text box, enter the request category number (required).
5. In the Name text box, enter the name of the request category.
6. In the Description text box, enter a description of the request category.
7. On the Request Category form, click the Modules tab.
8. Click Add.
9. In the Select Modules list, select one or more module component records.
10. Click Save on the Select Modules list.
11. If needed, use the Request Class tab to assign one or more Request Class records to this Request Category.
12. Click Save on the Request Category form.

Edit a Request Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Category.
3. In the Request Category grid list, click the request category record to be edited.
4. Click the Open button on the Request Category grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Request Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Category.
3. In the Request Category grid list, click the request category record to be removed.
4. Click the Remove button on the Request Category grid list.

Assign a Request Class record(s) to a Request Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Category.
3. On the Request Category grid list do one of the following to open the Request Category form:

- Click the Add button.

- Select a record in the Request Category grid list, and then click the Open button.

4. On the Request Category form, click the Request Class tab.
5. Click Add.
6. In the Select Request Class list, select one or more request class records.
7. Click Save on the Select Request Class list.
8. Click Save on the Request Category form.

Remove a Request Class record(s) from a Request Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Category.
3. In the Request Category grid list, click the request category record to be edited.
4. Click the Open button on the Request Category grid list.
5. On the Request Category form, click the Request Class tab.
6. Select the Request Class record(s) to be removed.
7. Click Remove.
8. Click Yes to confirm the removal.
9. Click Save.

Request Class

Request Class is the second tier in the work request classification hierarchy and can be used to further classify work requests. If you choose to use the Request Class tier of the classification hierarchy to organize and classify your work requests, this tier must be assigned to a record in its parent tier, Request Category.

Request Class Grid

Evolve includes several predefined request classes, however you can add, edit, or remove the classes as needed.

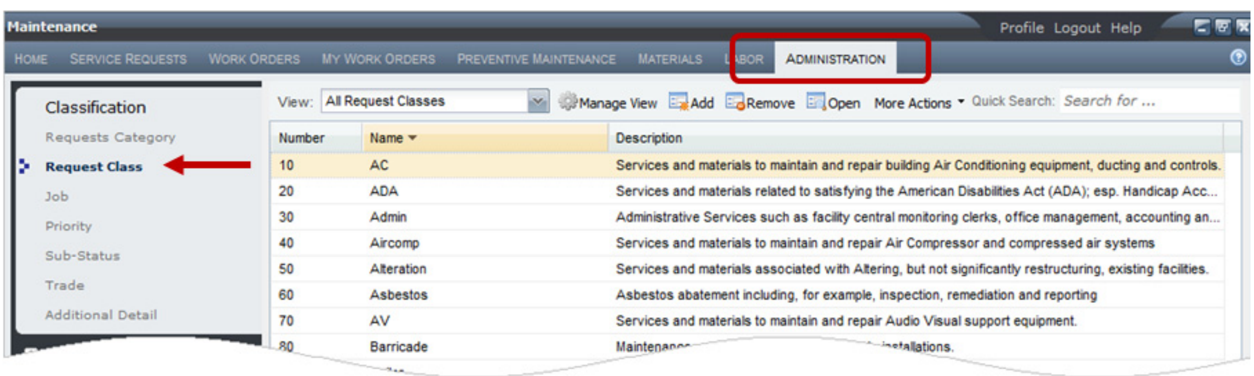
Use the request class grid to:

- Retrieve a list of all Request Class records
- Add a new Request Class record
- Open the Request Class form to a specific Request Class record

To display the request class grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Request Class.

Figure 7—Request Class Grid



Request Class Form

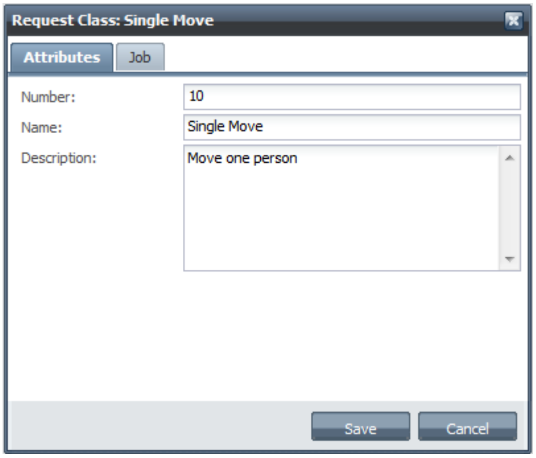
The Request Class form is used to configure request class records in EvolveFM.

To display the request class form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Request Class to display the Request Class grid.
4. Do one of the following:

- Click Add to open the Request Class form to a new record.
- Select an existing request class record in the grid list and then click Open.

Figure 8—Request Class Form, Attributes Tab



Attributes Tab

Number. The number field is used to itemize your request class list (required, numeric entry only).

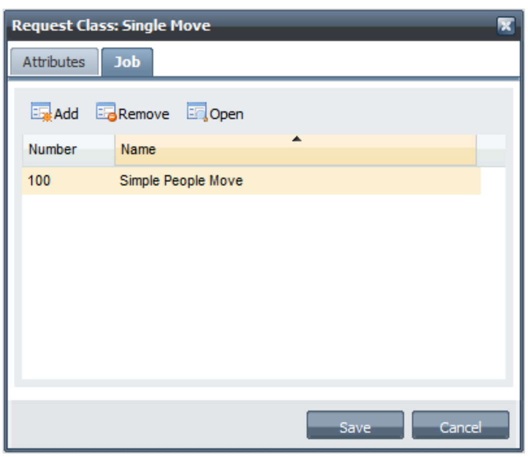
Name. Use to enter the name of the Request Class.

Description. Use to enter a description of the Request Class.

Job Tab

The Job tab is used to assign the Job records that you want to make available for selection when the Request Class is used. The Job records assigned here will be the selections available in the Job pick list when the Request Class is assigned to a request, service request, or work order.

Figure 9—Request Class Form, Job Tab



Add. Use the Add button to open the selection form and select the Job records to be assigned to the Request Class.

Remove. Use the Remove button to remove a selected Job record from the tab.

Open. Use the Open button to open the Job form to the selected Job record.

Managing Your Request Class List

Display the Request Class grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Class.

Add a new Request Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Class.
3. Click the Add button on the Request Class grid list to open the Request Class form.
4. In the Number text box, enter the Request Class number (required).
5. In the Name text box, enter the name of the Request Class.
6. In the Description text box, enter a description of the Request Class.
7. If needed, use the Job tab to assign one or more Job records to this Request Class
8. Click Save.

Edit a Request Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Class.
3. In the Request Class grid list, click the Request Class record to be edited.
4. Click the Open button on the Request Class grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Request Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Class.
3. In the Request Class grid list, click the Request Class record to be removed.
4. Click the Remove button on the Request Class grid list.

Assign a Job record(s) to a Request Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Class.
3. On the Request Class grid list do one of the following to open the Request Class form:

- Click the Add button.
- Select a record in the Request Class grid list, and then click the Open button.

4. On the Request Class form, click the Job tab.
5. Click Add.
6. In the Select Job list, select one or more job records.

7. Click Save on the Select Job list.
8. Click Save on the Request Class form.

Remove a Job record(s) from a Request Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Class.
3. In the Request Class grid list, click the request class record to be edited.
4. Click the Open button on the Request Class grid list.
5. On the Request Class form, click the Job tab.
6. Select the Job record(s) to be removed.
7. Click Remove, and then click Yes to confirm the removal.
8. Click Save.

Assign a Request Class record(s) to a Request Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Category.
3. On the Request Category grid list do one of the following to open the Request Category form:

- Click the Add button.
- Select a record in the Request Category grid list, and then click the Open button.

4. On the Request Category form, click the Request Class tab.
5. Click Add.
6. In the Select Request Class list, select one or more request class records.
7. Click Save on the Select Request Class list.
8. Click Save on the Request Category form.

Job

The Job tier is the third tier of the work request classification hierarchy, and is the classification tier where job specific work order automation can be configured. If you choose to use the Job tier, each job record must be assigned to a record in its parent tier, Request Class.

Work Order Automation

The Job tier can be used to speed the work order process for jobs that you perform often. The level of work order automation for a job is controlled by the values set in the Job form. Use the Job tier to automate any of the following processes based on a work order's job assignment:

- Generate a work order
- Assign a Priority to a work order
- Assign a Trade to a work order
- Assign a Charge To to a work order
- Assign a Task to a work order
- Assign Estimated Hours to a work order
- Assign Labor to a work order
- Assign a Supervisor to a work order

Job Grid

Use the job grid to:

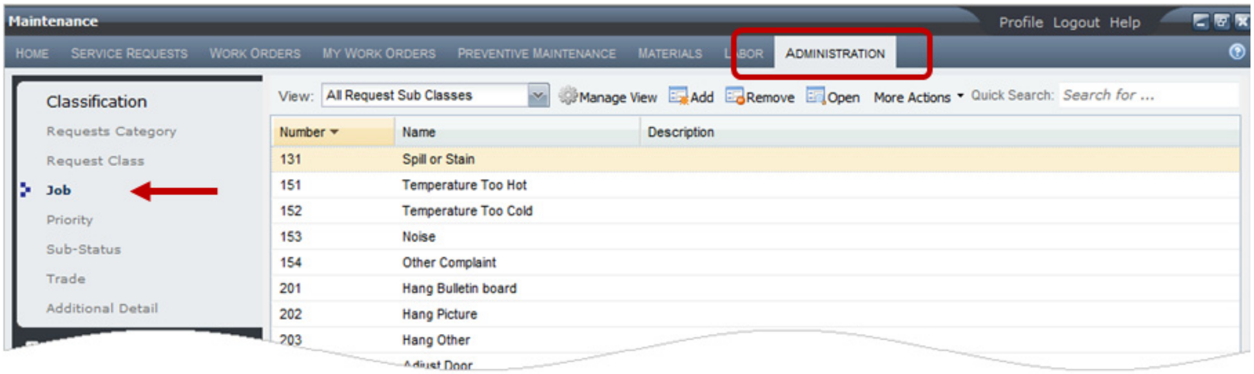
- Retrieve a list of all Job records
- Add a new Job record
- Open the Job form to a specific Job record

To display the request class grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.

3. In the Classification menu list, click Request Class.

Figure 10—Job Grid



Job Form

The Job form is used to configure job records in EvolveFM.

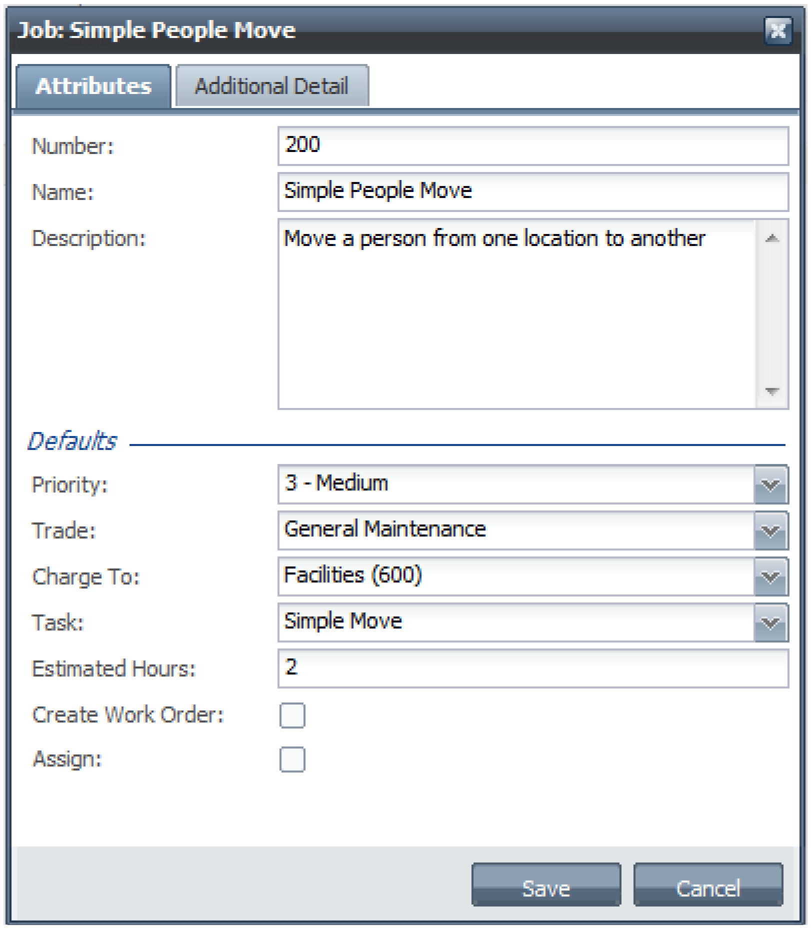
To display the job form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Job to display the Job grid.
4. Do one of the following:

- Click Add to open the Job form to a new record.

- Select an existing job record in the grid list and then click Open.

Figure 11—Job Form



Attributes Tab

Number. The number field is used to itemize you job list (required, numeric entry only).

Name. Use to enter the name of the Job.

Description. Use to enter a description of the Job.

Defaults

The values set in the Defaults section of the job form are used to control the level of work order automation for a specific job.

Priority. When a priority is entered on the Job form it will be used to assign the priority on a service request or work order. The assigned priority is then used to automatically calculate the work order Response Due and Completion Due dates.

Trade. When a trade is entered on the Job form it will be used to assign the trade on a service request or work order. The assigned trade is then used to filter labor selection, and if desired, assign labor to the work order.

Task. When a task is selected on the Job form, the task and its assigned steps and readings will be automatically added to the Task tab of the Work Order form.

Estimated Hours. Use to enter the estimated hours need to complete the job. The estimated hours entered on the Job form will automatically populate the Estimated Hours field on the Work Order form.

Create Work Order. If the Create Work Order check box is selected, a work order will be automatically generated when a service request is submitted for the job.

Assign. If the Assign check box is selected, Evolve will automatically assign the work order to the *first* labor record that it finds assigned to the same trade AND to the same property location as is assigned to the work order.

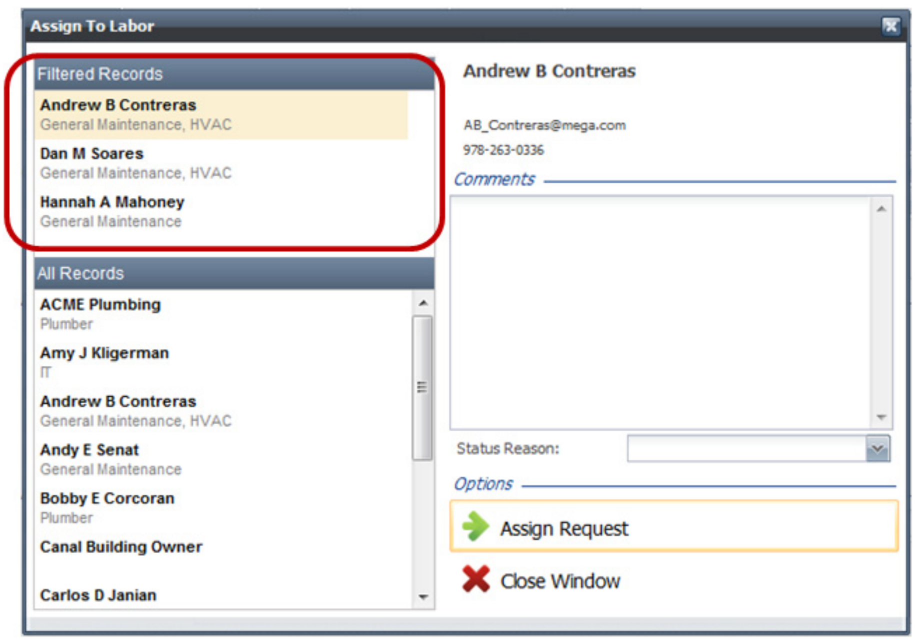
How automatic labor assignment works:

The trade and property location assigned to a service request or work order are used in combination to identify labor records that are assigned to the same trade and property location.

If the Assign check box is selected, Evolve will automatically assign the work order to the *first* labor record match that it finds. For example, in the figure shown below, Andrew B Contreras appears first in the Filtered Records labor list, therefore Andrew would be automatically assigned as labor.

Note: *If you have multiple labor providers with the same trade and assigned to the same location, the automatic Assign option could result in over extending one particular labor provider.*

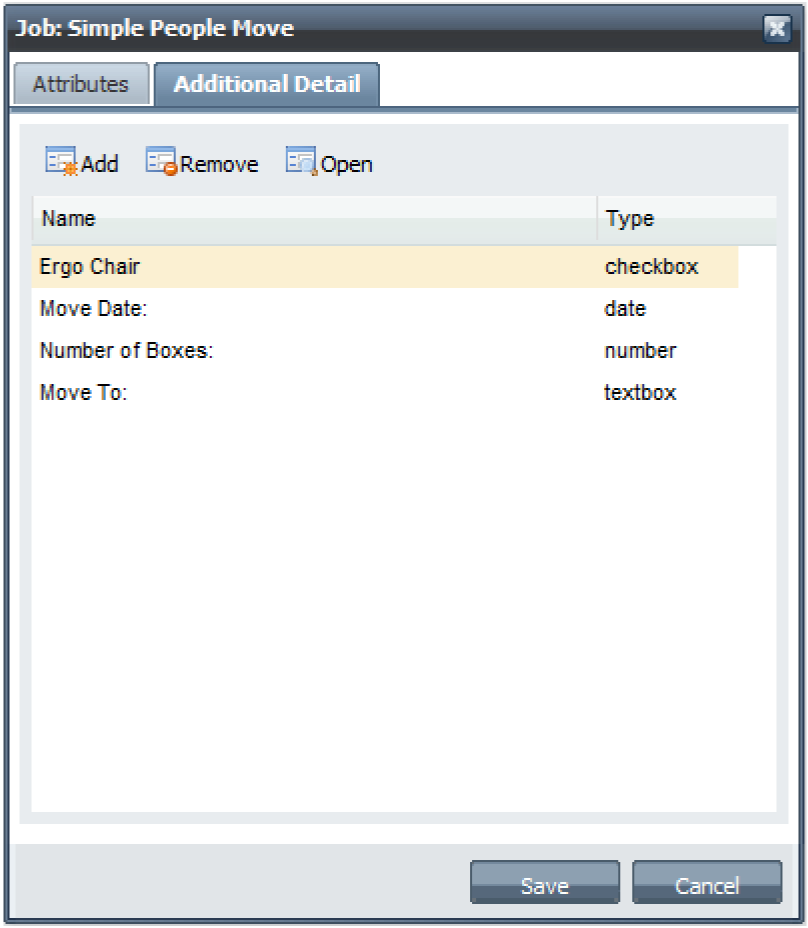
Figure 12— Assign to Labor Form



Additional Detail Tab

The Additional Detail tab of the Job form is used to add custom data fields to a job specific service request or work order.

Figure 13—Additional Details Tab, Job Form



Additional Detail Tab Controls

Add. Use the Add button to open the selection form and select the Additional Detail records to add to the job.

Note: *Additional Detail fields are displayed on a service request or work order based on the order in which they are added to the Additional Details tab of the Job form. The sort order of the Additional Detail tab has no effect on the display order.*

Remove. Use the Remove button to remove a selected Additional Detail field from the tab.

Open. Use the Open button to open the Additional Detail form to the selected Additional Detail record.

Managing Your Job List

Display the Job grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Job.

Add a new Job record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Job.
3. Click the Add button on the Job grid list to open the Job form.
4. In the Number text box, enter the Job number (required).
5. In the Name text box, enter the name of the Job.
6. In the Description text box, enter a description of the Job.
7. Configure the fields in the Defaults section as needed to automate your work order process.
8. Click Save.

Edit a Job record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Job.
3. In the Job grid list, click the Job record to be edited.
4. Click the Open button on the Job grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Job record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Job.
3. In the Job grid list, click the Job record to be removed.
4. Click the Remove button on the Job grid list.

Assign a Job record(s) to a Request Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Request Class.
3. On the Request Class grid list do one of the following to open the Request Class form:

- Click the Add button.
- Select a record in the Request Class grid list, and then click the Open button.

4. On the Request Class form, click the Job tab.
5. Click Add.
6. In the Select Job list, select one or more job records.

7. Click Save on the Select Job list.
8. Click Save on the Request Class form.

Add a Additional Detail fields to the Job Form

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Job.
3. On the Job grid list do one of the following to open the Job form:
4. Click the Add button.

- Select a record in the Job grid list, and then click the Open button.

5. On the Job form, click the Additional Detail tab.
6. Click Add.
7. On the Select Additional Detail form, locate and select your configured data field.

Note: *The display order of the Additional Detail fields on a service request or work order is based on the order in which the fields are added to the Additional Details tab of the Job form.*

8. Click Save.
9. Repeat steps 11-12 to add another Additional Detail data field to the Job form as needed.

Additional Detail

Similar to the User Defined Attributes used in Evolve, the Additional Detail data fields are custom data fields that can be configured and then added to the Job form to be used to store and collect job specific data.

Evolve provides twenty instances each of the following Additional Detail data field types:

- Check box
- Currency
- Date*
- Number
- Text Area
- Text box
- Time

Note: **The Additional Detail Date 20 data field is configured to work with the Advanced Data Import Occupant Moves grid. Contact your EvolveFM consultant for more information.*

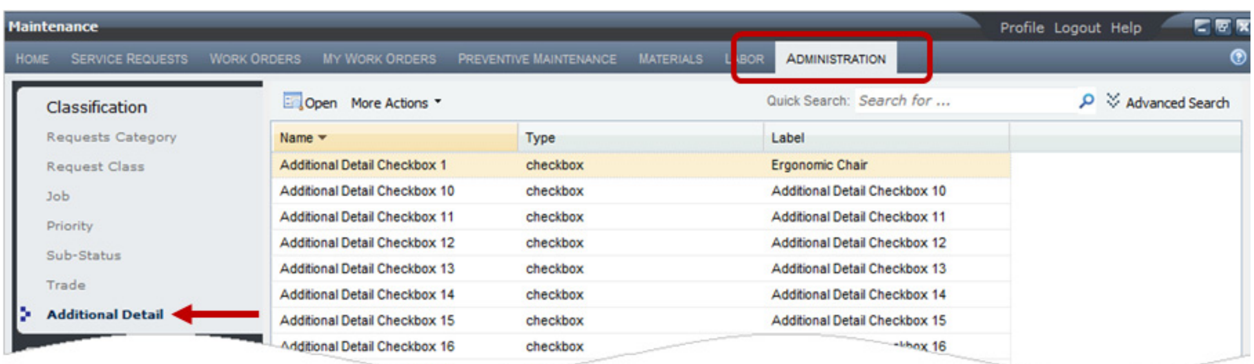
Additional Detail Grid

The Additional Detail grid is used to manage the Additional Detail data fields in Evolve.

To display the additional detail grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Additional Detail

Figure 14—Additional Detail Grid



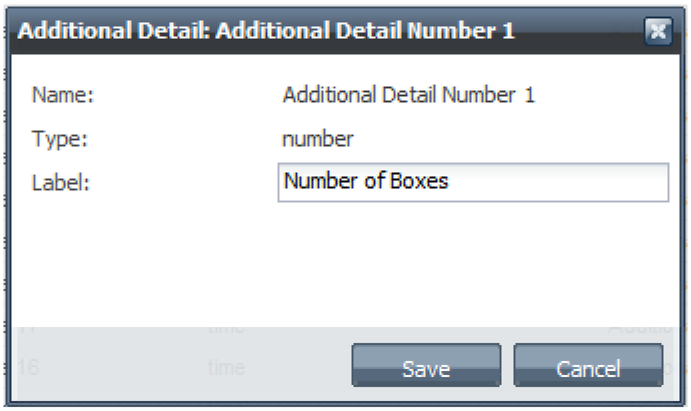
Additional Detail Form

The Additional Detail form is used to configure additional detail records for use with jobs in EvolveFM.

To display the additional detail form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Classification menu list, click Additional Detail to display the Additional Detail grid.
4. Select an Additional Detail record in the grid list and then click Open.

Figure 15—Additional Detail Form



Additional Detail Form Controls

Name. (read-only) Displays the data type and instance number of the selected Additional Detail field.

Note: *There are 7 data types and 20 instances of each data type available in Evolve.*

Type. (read-only) Displays the data type of the selected Additional Detail field.

Label. Use to define the label text to be displayed next to the data field when it is used on a service request or work order.

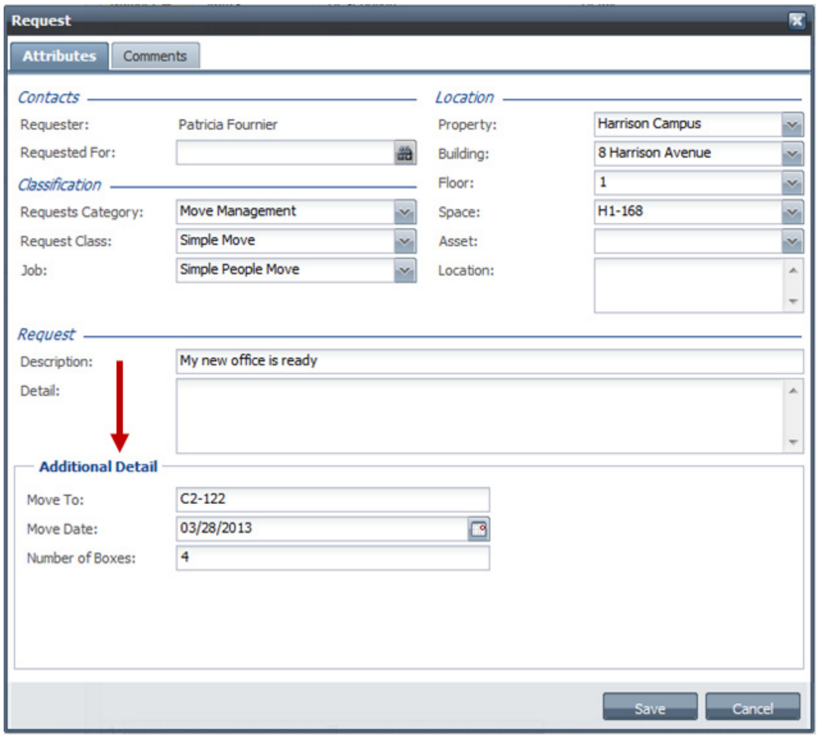
Additional Detail Field Display

On the Request Form

When a job configured with Additional Detail data fields is assigned to the Request form, the Additional Detail will display at the bottom of the Request form.

Note: *The display order of the Additional Detail fields is based on the order in which the fields are added to the Additional Details tab of the Job form.*

Figure 16—Request Form, Requester Component

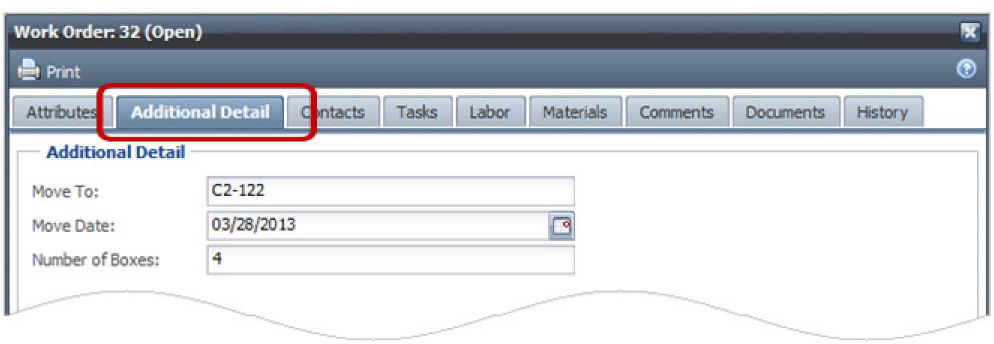


On the Work Order & Service Request Forms

When a job configured with Additional Detail data fields is assigned to the Work Order form or Service Request form, the Additional Detail fields will display on the Additional Detail tab of the form.

Note: *The display order of the Additional Detail fields is based on the order in which the fields are added to the Additional Details tab of the Job form.*

Figure 17—Work Order Form



Configuring Additional Detail Data Fields

1. In Maintenance, click the Administration button on the menu.
2. In the Classification group, click Additional Detail.
3. In the Additional Detail grid list, select the type of data field that you want to use (text box, check box, etc.).
4. Click Open to open the Additional Detail form.
5. In the Label text box, edit the default text to display the label text you want use.
6. Click Save.
7. Repeat steps 1-6 to configure as many Additional Detail fields as needed for your job.

9: Tasks, Steps, & Readings

About Tasks, Steps and Readings

Tasks

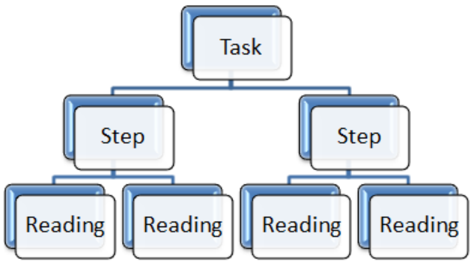
Steps

Readings

About Tasks, Steps, and Readings

Tasks, Steps, and Readings can be used to define the procedures that need to be performed to complete a work order. The thee elements work together in a hierarchy structure as illustrated below.

Figure 1—Task, Step, and Reading Hierarchy



What is a task?

A Task is a means to add an objective or function to be performed on a work order. A work order may contain one or more Tasks.

Tasks can be assigned to a work order in the two following manners:

- Through the assignment of a Job
- Through Preventive Maintenance

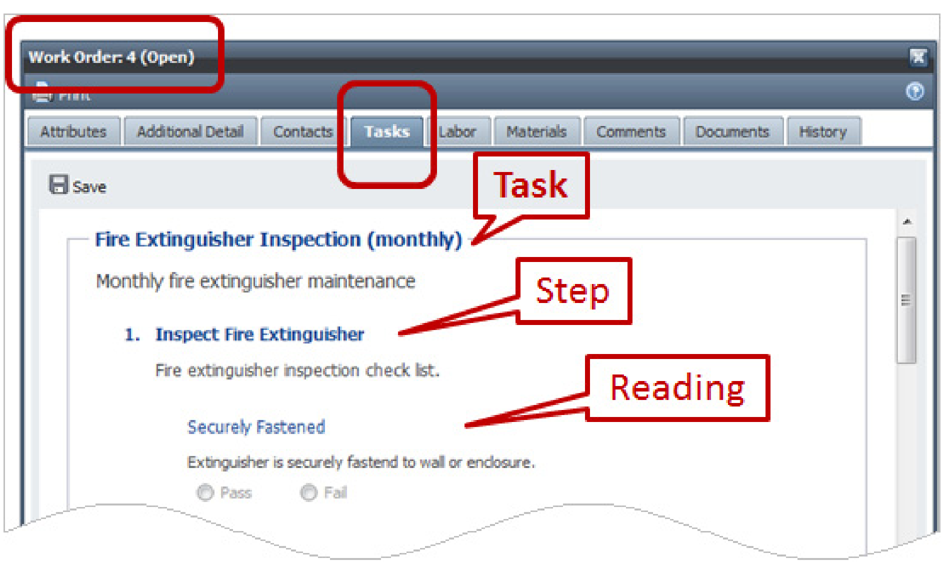
What is a step?

A Step is designed to be an instructional part of a Task and is used to break the solution for the Task into smaller, chronological instructions. One Task may contain one or more Steps.

What is a Reading?

A Reading is designed to document data collected when performing a Step. One Step may contain one or more Readings.

Figure 2—Task, Step, and Reading on a Work Order



Tasks

Tasks are used to identify and organize the objectives or functions to be performed on a work order. Once created, a Task can be reused on any number of work orders.

When Tasks are assigned to a work order through the assignment of a Job or through Preventive Maintenance, they are displayed on the Tasks tab of the Work Order form.

Tasks Grid

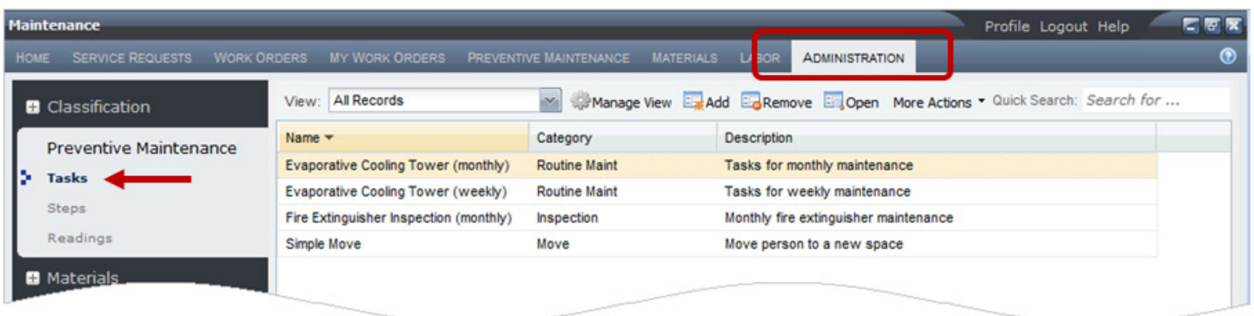
Use the tasks grid to:

- Retrieve a list of all Task records
- Add a new Task record
- Open the Task form to a specific Task record

To display the tasks grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Preventive Maintenance menu list, click Tasks.

Figure 3—Tasks Grid



Task Form

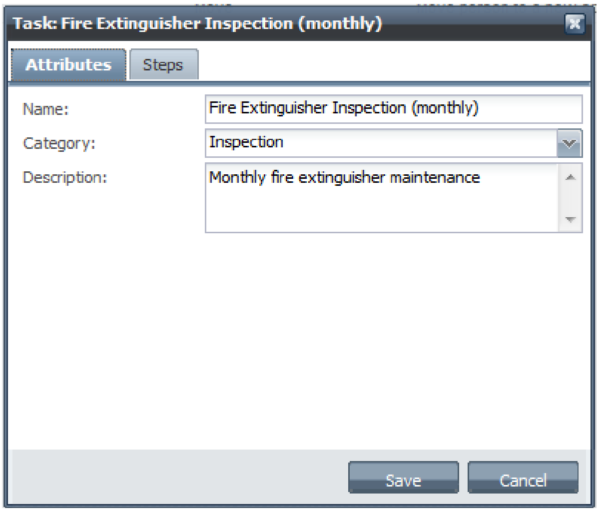
The Task form is used to configure Task records in EvolveFM.

To display the task form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Preventive Maintenance menu list, click Tasks to display the Tasks grid.
4. Do one of the following:

- Click Add to open the Task form to a new record.
- Select an existing task record in the grid list and then click Open.

Figure 4—Task Form



Attributes Tab

Name. Use to define the name of the Task.

Note: *The Task name will appear in bold text on the Tasks tab of the Work Order form.*

Category. The Category pick list is used to organize your Tasks for easier sorting and filtering purposes. To add categories to the pick list, simply enter data directly into the Category field. Once a category has been assigned to a Task, the category will remain in the list for future use. If a category is no longer assigned to at least one Task, it will be removed from the pick list.

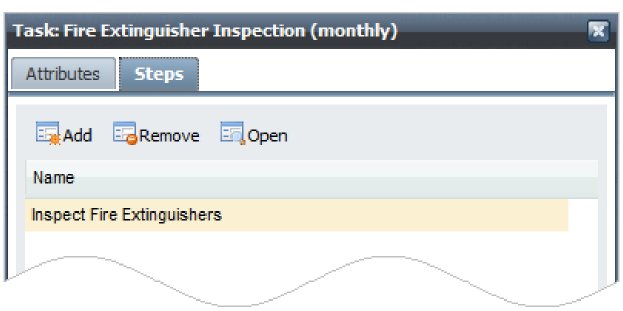
Description. Use to enter a description of the Task.

Note: *The description will display under the Task name on the Tasks tab of the Work Order form.*

Steps Tab

Use to assign one or more Step records to a Task record. Steps will appear below the Task on a work order in the sequence they are added to the Steps Tab.

Figure 5—Steps Tab, Task Form



Add. Use the Add button to open the Select form and select the Step records to be assigned to the Task.

Remove. Use the Remove button to remove a selected Step record from the Steps tab.

Open. Use the Open button to open the Step form to the selected Step record.

Managing Your Tasks List

Display the Tasks grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Tasks.

Add a new Task record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Tasks.
3. Click the Add button on the Tasks grid list to open the Task form.
4. In the Name text box, enter the name of the task (required).
5. In the Category pick list do one of the following:

- Select a category from the pick list.
- Enter a new category into the pick list.

6. In the Description text box, enter a description of the task.
7. Click the Steps tab, and then click Add.
8. In the Select Step list, select one or more step records to assign them to the task.

NOTE: Steps will appear below the Task on the work order in the sequence they are added to the task record.

9. Click Save on the Select Task list.
10. Click Save on the Task form.

Edit a Task record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Tasks.
3. In the Tasks grid list, click the Task record to be edited.
4. Click the Open button on the Tasks grid list.
5. Edit the record data as needed.
6. Click Save.

NOTE: Edits do not alter tasks already assigned to work orders.

Remove a Task record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Tasks.
3. In the Tasks grid list, click the task record to be removed.
4. Click the Remove button on the Tasks grid list.

NOTE: Removing a task does not remove it from existing work orders that contain the task.

Assign a Step record(s) to a Task record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Tasks.
3. On the Tasks grid list do one of the following to open the Task form:

- Click the Add button.
- Select a record in the Tasks grid list, and then click the Open button.

4. On the Task form, click the Steps tab.
5. Click Add.
6. In the Select Task list, select one or more task records.

NOTE: Steps will appear below the Task on the work order in the sequence they are added to the task record.

7. Click Save on the Select Task list.
8. Click Save on the Task form.

Remove a Step record(s) from a Task record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Tasks.
3. In the Tasks grid list, click the task record to be edited.
4. Click the Open button on the Tasks grid list.
5. On the Task form, click the Steps tab.
6. Select the Step record(s) to be removed.
7. Click Remove.
8. Click Yes to confirm the removal.
9. Click Save.

Assigning a Task to a Work Order

A task can only be added to a work order in two ways:

- Through the assignment of a Job
- Through Preventive Maintenance

Steps

A Step is designed to be one instructional part of a Task and is used to break the solution for the Task into smaller, chronological pieces. One Task may contain several Steps on a work order. Once created, a Step can be reused on any number of Tasks. For example, a Lock Out/Tag Out step can be assigned to each task that requires the labor provider to perform Lock Out/Tag Out.

When used on a work order, Steps are displayed under their assigned Task on the Tasks tab of the Work Order form.

Steps Grid

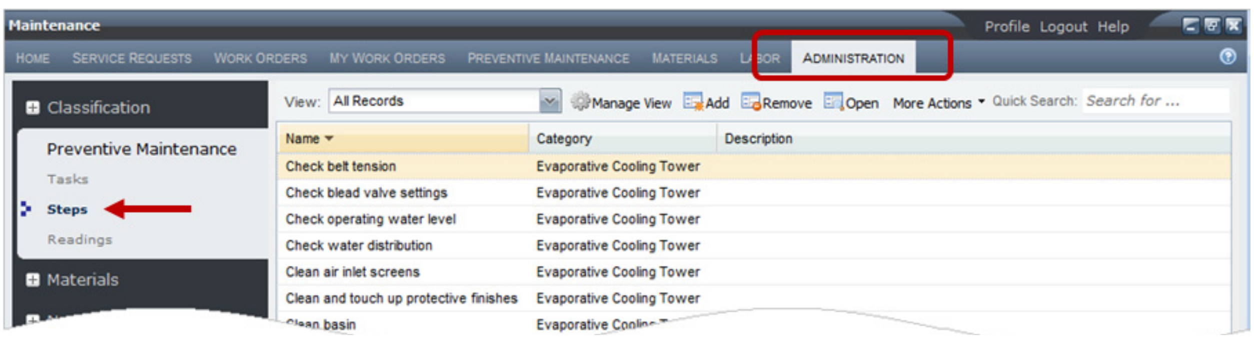
Use the steps grid to:

- Retrieve a list of all Step records
- Add a new Step record
- Open the Step form to a specific Step record

To display the steps grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Preventive Maintenance menu list, click Steps.

Figure 6—Steps Grid



Step Form

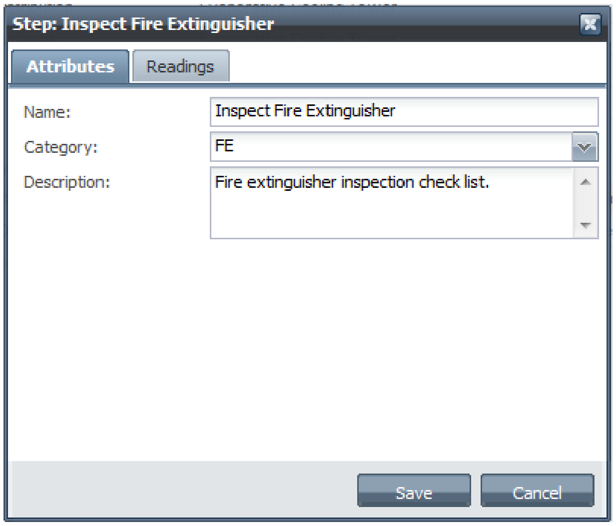
The Step form is used to configure step records in EvolveFM.

To display the step form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Preventive Maintenance menu list, click Steps to display the Steps grid.
4. Do one of the following:

- Click Add to open the Step form to a new record.
- Select an existing step record in the grid list and then click Open.

Figure 7—Step Form



Attributes Tab

Name. Use to define the name of the Step.

Note: *The Step name will appear in bold text below its associated Task on the Tasks tab of the Work Order form.*

Category. The Category pick list is used to organize your steps for easier sorting and filtering purposes. To add categories to the pick list, simply enter data directly into the Category field. Once a category has been assigned to a step, the category will remain in the list for future use. If a category is no longer assigned to at least one step, it will be removed from the pick list.

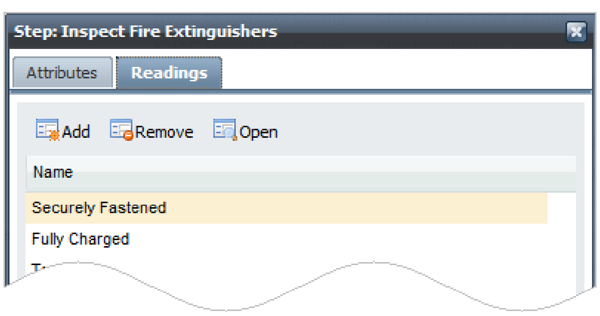
Description. Use to enter a description of the Step.

Note: *The description will display under the Step name on the Tasks tab of the Work Order form.*

Readings Tab

Use to assign one or more Reading records to a Step record. Readings will appear below the Step on a work order in the sequence they are added to the Readings Tab.

Figure 8—Steps Tab, Task Form



Add. Use the Add button to open the Select form and select the reading records to be assigned to the Step.

Remove. Use the Remove button to remove a selected reading record from the Readings tab.

Open. Use the Open button to open the Reading form to the selected Reading record.

Managing Your Steps List

Display the Steps grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Steps.

Add a new Step record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Steps.
3. Click the Add button on the Steps grid list to open the Step form.
4. In the Name text box, enter the name of the step (required).
5. In the Category pick list do one of the following:

- Select a category from the pick list.
- Enter a new category into the pick list.

6. In the Description text box, enter a description of the step.
7. If needed, click the Readings tab, and then click Add.
8. In the Select Readings list, select one or more Reading records to assign them to the step.

NOTE: Readings will appear below the Step on the work order in the sequence they are added to the step record.

9. Click Save on the Select Reading list.
10. Click Save on the Step form.

Edit a Step record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Steps.
3. In the Steps grid list, click the Step record to be edited.
4. Click the Open button on the Steps grid list.
5. Edit the record data as needed.
6. Click Save.

NOTE: Edits will update all tasks that contain the step. Edits will not update steps already assigned to work orders.

Remove a Step record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Steps.
3. In the Steps grid list, click the step record to be removed.
4. Click the Remove button on the Steps grid list.

NOTE: Removing a step will remove it from all tasks that contain the step. Removing a step will not remove it from existing work orders that contain the step.

Assign a Reading record(s) to a Step record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Steps.
3. On the Steps grid list do one of the following to open the Step form:

- Click the Add button.
- Select a record in the Steps grid list, and then click the Open button.

4. On the Steps form, click the Readings tab.
5. Click Add.
6. In the Select Readings list, select one or more reading records.

NOTE: Readings will appear below the Step on the work order in the sequence they are added to the step record.

7. Click Save on the Select Reading list.
8. Click Save on the Step form.

Remove a Reading record(s) from a Step record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Steps.
3. In the Steps grid list, click the task record to be edited.
4. Click the Open button on the Steps grid list.
5. On the Step form, click the Reading tab.
6. Select the Reading record(s) to be removed.
7. Click Remove.
8. Click Yes to confirm the removal.
9. Click Save.

Assign a Step record(s) to a Task record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Tasks.
3. On the Tasks grid list do one of the following to open the Task form:

- Click the Add button.
- Select a record in the Tasks grid list, and then click the Open button.

NOTE: Steps will appear below the Task on the work order in the sequence they are added to the task record.

4. On the Task form, click the Steps tab.
5. Click Add.
6. In the Select Task list, select one or more task records.
7. Click Save on the Select Task list.
8. Click Save on the Task form.

Readings

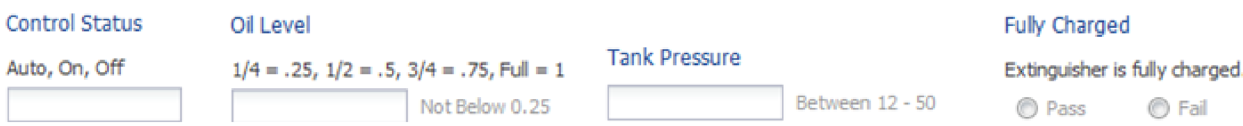
A Reading is designed to document data collected during the performance of a Step. One Step may contain several readings on a work order. Once created, a Reading can be reused on any number of Steps. For example, a Level Reading can be created and then assigned to each Step that requires the labor provider to record the fluid level of an asset.

When used on a work order, Readings are displayed below their assigned Steps on the Tasks tab of the Work Order form in the sequence they are added to the Readings Tab of the Step form.

Reading Examples

Each Reading on a work order will display the Reading name, the Reading description, a data collection field, and associated Reading criteria as shown in the examples below.

Figure 9—Example Readings



Readings Grid

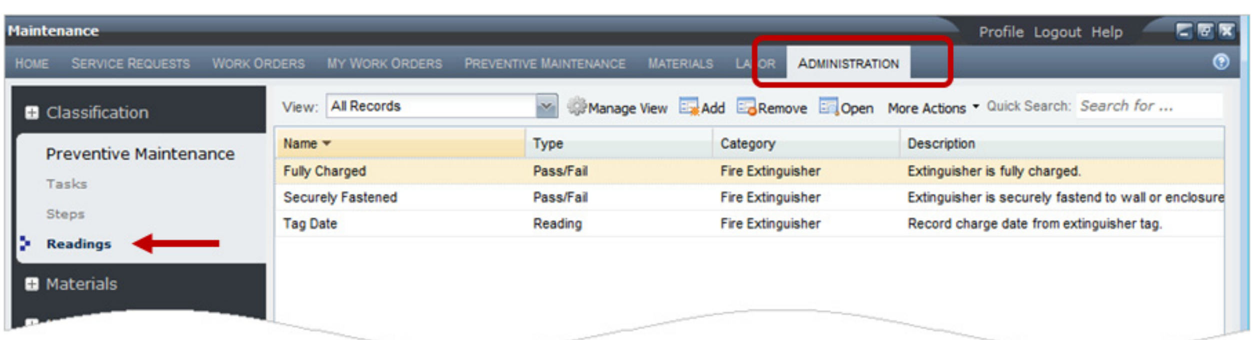
Use the readings grid to:

- Retrieve a list of all Reading records
- Add a new Reading record
- Open the Reading form to a specific Reading record

To display the readings grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Preventive Maintenance menu list, click Readings.

Figure 10—Readings Grid List



Reading Form

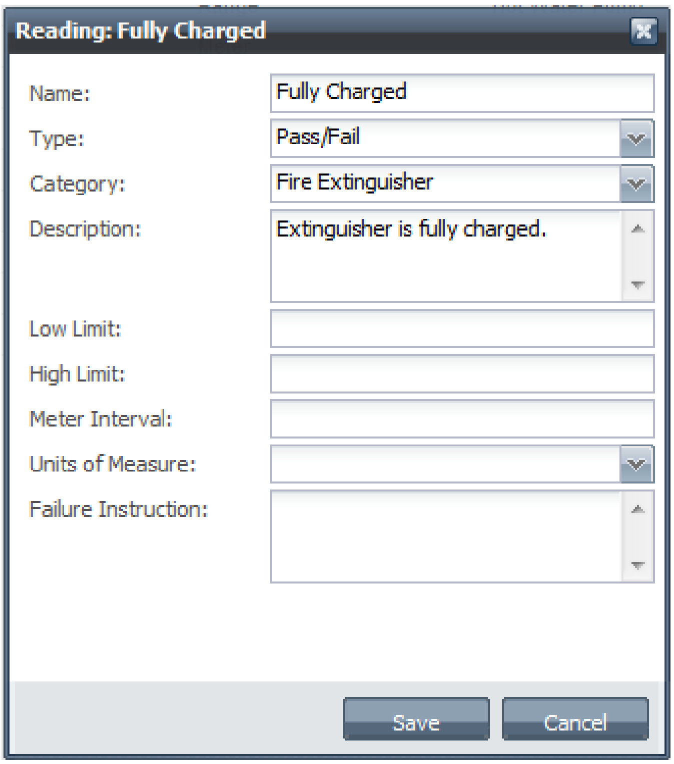
The Reading form is used to configure reading records in EvolveFM.

To display the reading form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Preventive Maintenance menu list, click Readings to display the Readings grid.
4. Do one of the following:

- Click Add to open the Reading form to a new record.
- Select an existing reading record in the grid list and then click Open.

Figure 11—Reading Form



Name. Use to define the name of the Reading.

Note: *The Reading name will appear below its associated step on the Tasks tab of the Work Order form.*

Category. The Category pick list is used to organize your readings for easier sorting and filtering purposes. To add categories to the pick list, simply enter data directly into the Category field. Once a category has been assigned to a reading, the category will remain in the list for future use. If a category is no longer assigned to at least one reading, it will be removed from the pick list.

Description. Use to enter a description of the Step.

Note: *The description will display under the step name on the Tasks tab of the Work Order form.*

Reading Types

- **Low Limit** - Use to enter a numeric value on a work order. The message "Not Below" and the Low Limit criteria value will be displayed to the right of this collection field on the work order.
- **High Limit** - Use to enter a numeric value on a work order. The message "Not Above" and the High Limit criteria value will be displayed to the right of this collection field on the work order.
- **Meter** - Use to enter a numeric value on a work order.
- **Pass/Fail** - Use to select a Pass or Fail radio button on a work order.
- **Range** - Use to enter a numeric value on a work order. The message "Between" and the Low Limit and High Limit criteria values will be displayed to the right of this collection field on the work order.
- **Reading** - Use to enter an alphanumeric value on a work order.

Reading Criteria

The Reading Criteria data fields are used in conjunction with the Reading Type fields.

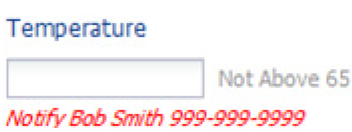
- **Low Limit** - (numeric) Use to set the low limit criteria value for the reading type Low Limit (Not Below) and the reading type Range (Between).
- **High Limit** - (numeric) Use to set the high limit criteria value for the reading type High Limit (Not Above) and the reading type Range (Between).
- **Meter Interval** - (numeric) Use to set the meter reading criteria value for the reading type Meter.

Units of Measure

The Units of Measure pick list can be used to select the unit of measure for the assigned reading type. The unit of measure Name will display to the right of the reading criteria message on the work order. The values included in the Units of Measure pick list are configured in the Materials group of Maintenance Administration.

Failure Instruction

The Failure Instruction text field can be used to enter a message stating what action should be taken should the reading fail its set criteria. The message is displayed in red text below the reading collection field on the work order.



Managing Your Readings List

Display the Readings grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Readings.

Add a new Reading record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Readings.
3. Click the Add button on the Readings grid list to open the Reading form.

4. In the Name text box, enter the name of the Reading (required).
5. In Type pick list, select a reading type (required).
6. In the Category pick list do one of the following:

- Select a category from the pick list.
- Enter a new category into the pick list.

7. In the Description text box, enter a description of the reading.
8. If needed, enter a criteria value for your selected reading type (Low Limit, High Limit, Meter Interval).
9. If needed, select a unit of measure.
10. If needed, enter a Failure Instruction.
11. Click Save.

Edit a Reading record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Readings.
3. In the Readings grid list, click the Reading record to be edited.
4. Click the Open button on the Readings grid list.
5. Edit the record data as needed.
6. Click Save.

NOTE: Edits will update all steps that contain the reading. Edits will not update steps already assigned to work orders.

Remove a Reading record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Readings.
3. In the Readings grid list, click the Reading record to be removed.
4. Click the Remove button on the Readings grid list.

NOTE: Removing a reading will remove it from all steps that contain the reading. Removing a reading will not remove it from existing work orders that contain the reading.

Assign a Reading record(s) to a Step record

1. In Maintenance, click the Administration button on the menu.
2. In the Preventive Maintenance group, click Steps.
3. On the Steps grid list do one of the following to open the Step form:

- Click the Add button.
- Select a record in the Steps grid list, and then click the Open button.

NOTE: Readings will appear below the Step on the work order in the sequence they are added to the step record.

4. On the Step form, click the Readings tab.
5. Click Add.

6. In the Select Reading list, select one or more reading records.
7. Click Save on the Select Reading list.
8. Click Save on the Step form.

10: Labor

About Labor

Labor Grid

Labor Form

New Labor Form

Managing Labor Records

About Labor

To perform a work order you need someone to do the work. Labor providers are defined as the people or vendors who will do the work related to a work order.

Labor provider records are a subset of Evolve Contact records. You can choose people and vendors from your Contacts list and add them to your Labor list, or you can create new Labor records which in turn will be automatically added to your Evolve Contacts list.

Utilizing labor in Evolve allows you to:

- Track labor time and costs related to a work order.
- Identify labor providers by trade.
- Assign labor providers to the location(s) that they are responsible for within your organization.
- Send service request and work order email notifications to labor providers.

Labor Grid

The Labor Grid displays a list of all labor records in the organization.

Use the labor grid to:

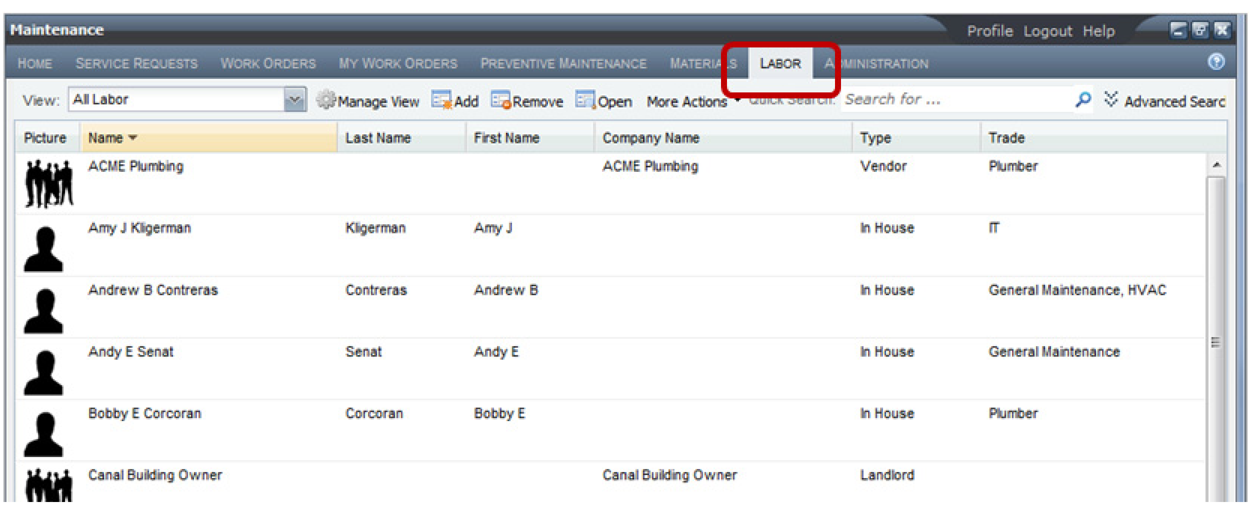
- Retrieve a list of all Labor providers
- Open the Labor form to a specific Labor record
- Add and Remove Labor records

Note: *Removing a Labor record does not remove its associated Contact record.*

To display the labor grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Labor tab.

Figure 1—Labor Grid



Labor Form

The Labor form is used to manage Labor records in Evolve.

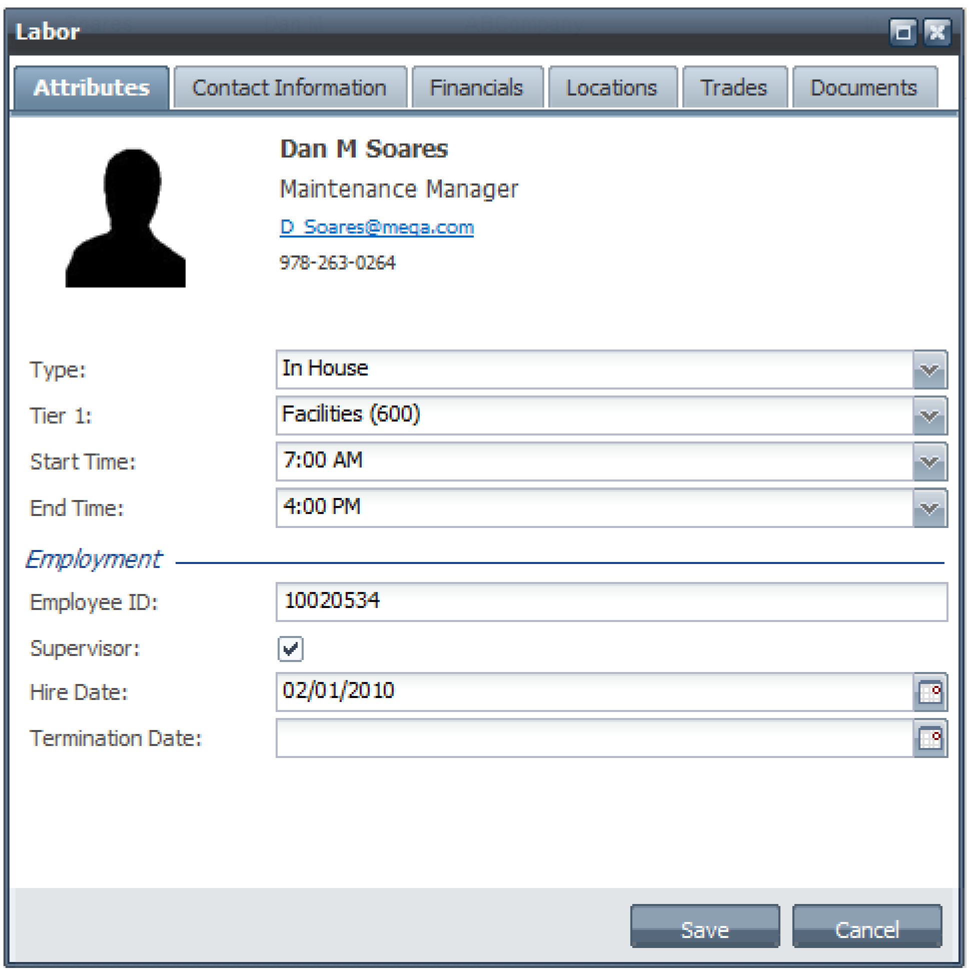
Note: *Because Labor records are a subset of Contact records, contact data associated with a labor provider will be displayed, and is editable, from the Labor form.*

To display the labor form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Labor tab.
3. Do one of the following:

- Select a Labor record in the grid list and then click Open.
- Double-click a Labor record in the grid list.

Figure 2—Labor Form



Attributes Tab

All data on the Attributes tab is optional and can be used only if you choose to track this information.

Type. Use the type field to categorize your labor types. Examples might include Vendor, In House, Contractor, etc. To add a Type to the pick list, simply enter data directly into the Type field. Once a Type has been assigned to a Labor record, the Type will remain in the list for future use. If a Type is no longer assigned to at least one Labor record, it will be removed from the pick list.

Tier 1 Assignment. Use to assign a business unit to the labor provider.

Start Time / End Time. Use to identify the labor provider's working hours.

Employee ID. Use to identify the labor provider's assigned employee ID.

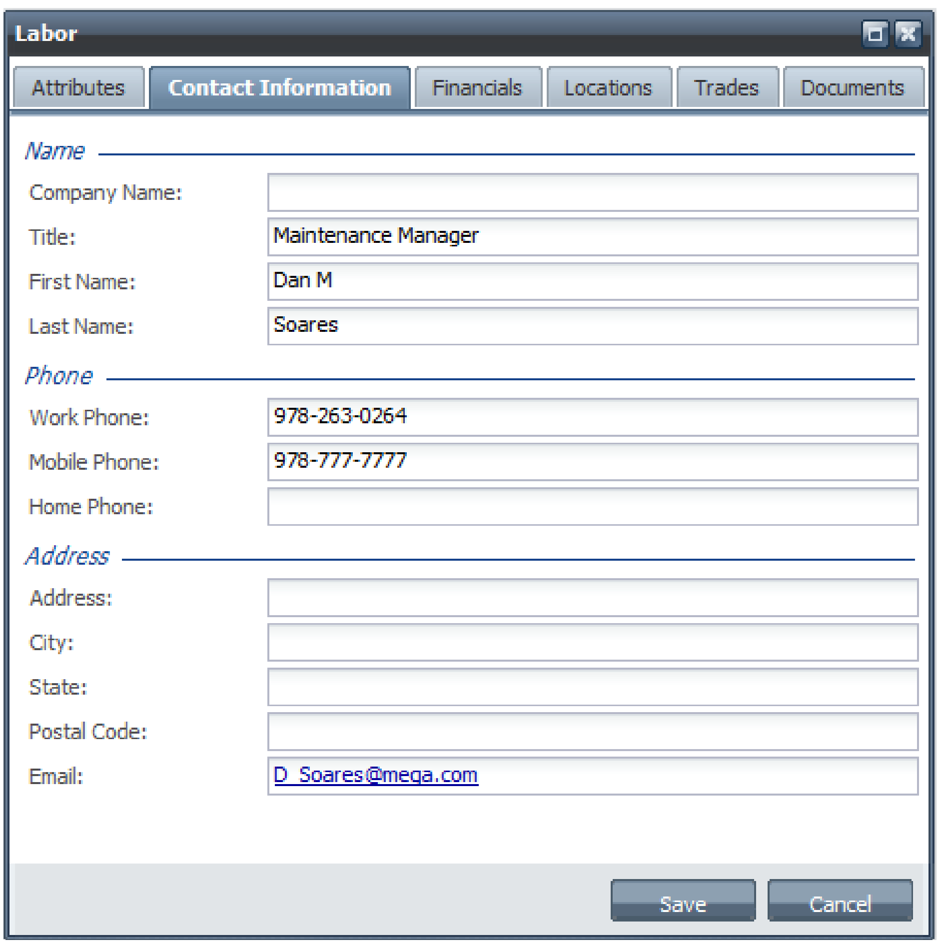
Supervisor. Use to identify the labor provider as a supervisor. Selecting this check box enables the following:

- The ability to filter the work order labor assignment selection list to labor providers designated as a Supervisor.
- The ability to assign a work order to a Supervisor.
- The ability to send email notifications to a Supervisor assigned to a work order.

Hire Date / Termination Date. Use the Hire and Termination Date fields to track labor employment status.

Contact Information Tab

Figure 3—Contact Information Tab, Labor Form



Company Name. Data is required in this field when a labor provider is created as a Company (rather than a Person). The Company Name entered here will be displayed in the work order labor assignment selection lists.

Title. Use the title field to store the labor provider's employment title.

First Name / Last Name. Data is required in these fields when a labor provider is created as a Person (rather than a Company). The name entered here will displayed in the work order labor assignment selection lists.

Phone. Use the phone fields to store phone numbers associated to the labor provider.

Address. Use the address fields to store address information related to the labor provider.

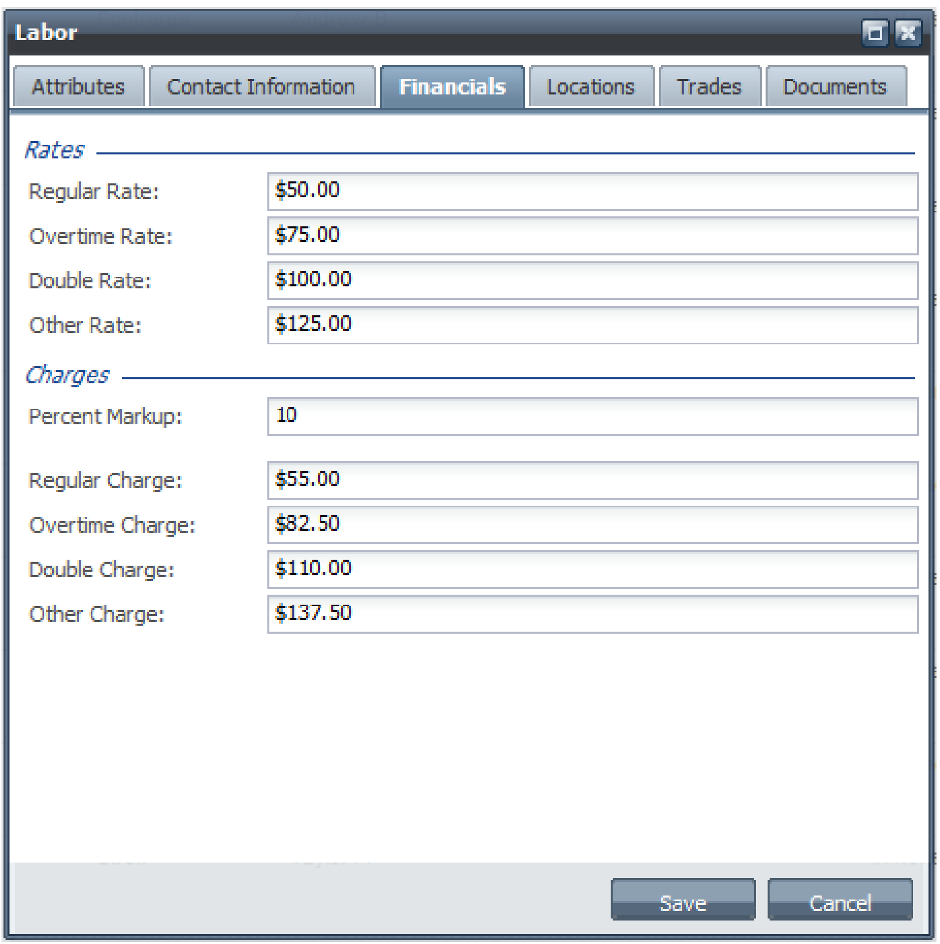
Email. The email address, or addresses entered here are used in conjunction with work order email notifications.

Note: *If entering more than one email address, separate the entries with a semi-colon.*
EX: rbell@ssfm.com; bsmith@ssfm.com; jtaylor@ssfm.com

Financials Tab

The Financials tab is used to set the pay rates for a labor provider. The data on the Financials tab is used together with the labor hours entered on a work order to calculate labor costs associated to the work order. All data on the Financials tab is optional and can be used only if you choose to track this information.

Figure 4—Financials tab, Labor Form



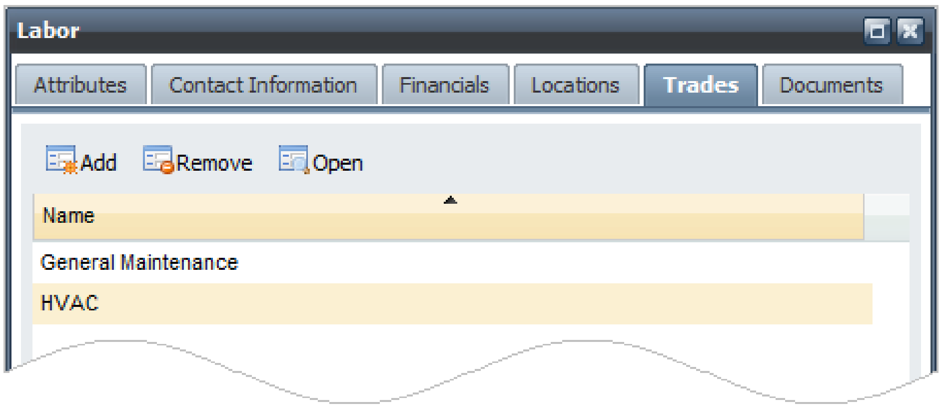
Rates. The labor Rate data entered here is used together with the Percent Markup value to calculate the labor rate to charge on a work order. To determine the labor rate to be charged, the Rate data is multiplied by the Percent Markup value and the result is used as the labor Charge value. EX: Regular Rate $50 X 10% markup = $55 Regular Charge, therefore $55/hr will be used as the labor charge on a work order.

Charges. (read-only) The labor Charge data is used to calculate the labor cost associated to a work order. The values displayed here will be multiplied by the labor hours entered on a work order to calculate the total labor cost of a work order.

Trades Tab

The Trades tab is used to assign trades to a labor provider. Trades can be used in conjunction with Locations to filter labor assignment selection lists to labor records assigned to the same trade and location as the work order.

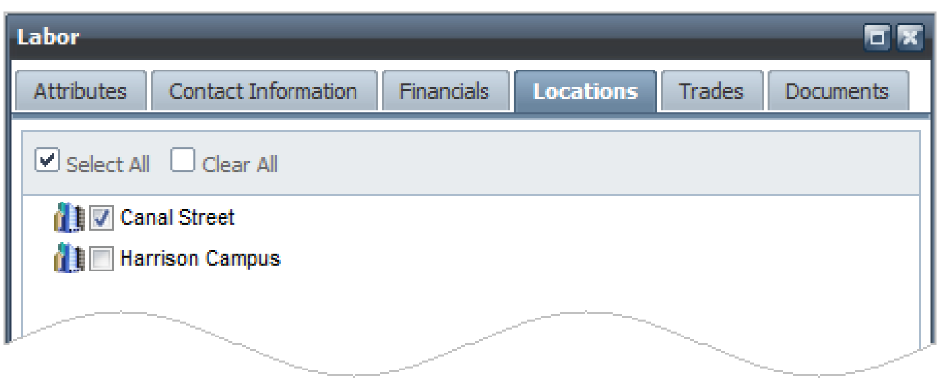
Figure 5—Trades Tab, Labor Form



Locations Tab

The Locations tab is used to select the property location(s) within your organization to which a labor provider is responsible. The location assignment can be used in conjunction with Trades to filter labor assignment selection lists to labor records assigned to the same location and trade as the work order.

Figure 6—Locations Tab, Labor Form



Documents Tab

The Documents tab can be used to attach documents to the labor record.

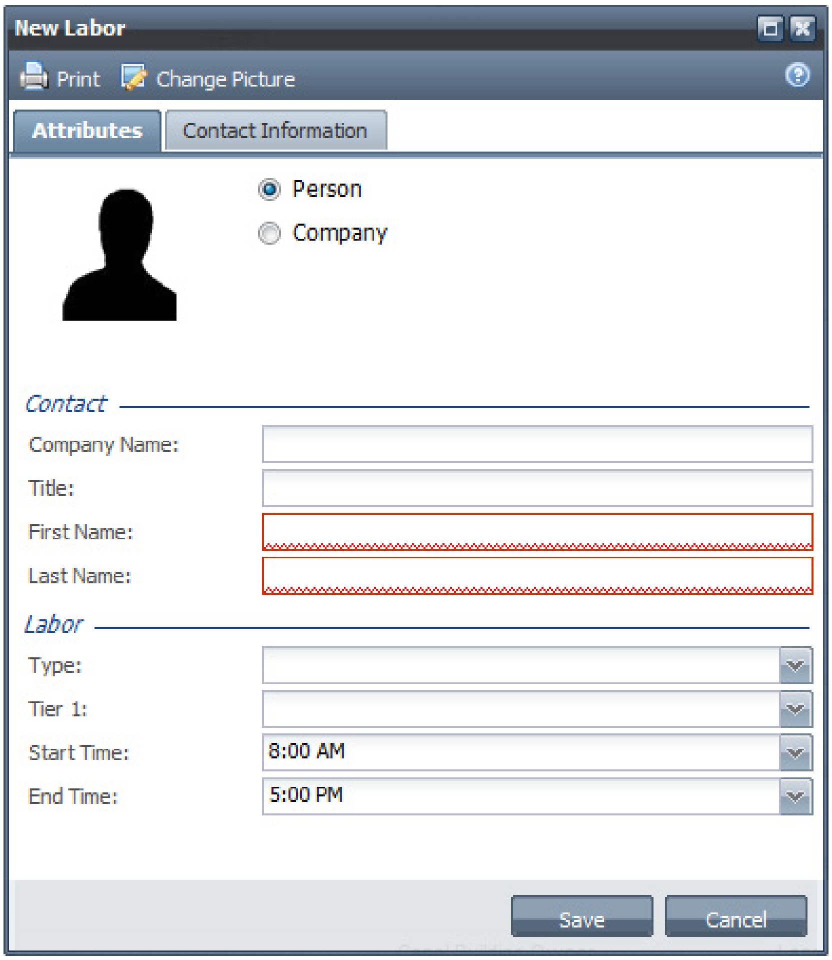
New Labor Form

The New Labor form is used to create a new labor record (and as a result, a new contact record) in Evolve.

To Open the Labor Form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Labor tab.
3. On the Labor Grid, click Add.
4. On the Select Labor form, click New.

Figure 7—New Labor Form



Attributes Tab

Person/Company. Use to identify the labor provider as a person or as a company.

Company Name. Data is required in this field when a labor provider is created as a Company (rather than a Person). The Company Name entered here will be displayed in the work order labor assignment selection lists.

Title. Use the title field to store the labor provider's employment title.

First Name / Last Name. Data is required in these fields when a labor provider is created as a Person (rather than a Company). The name entered here will displayed in the work order labor assignment selection lists.

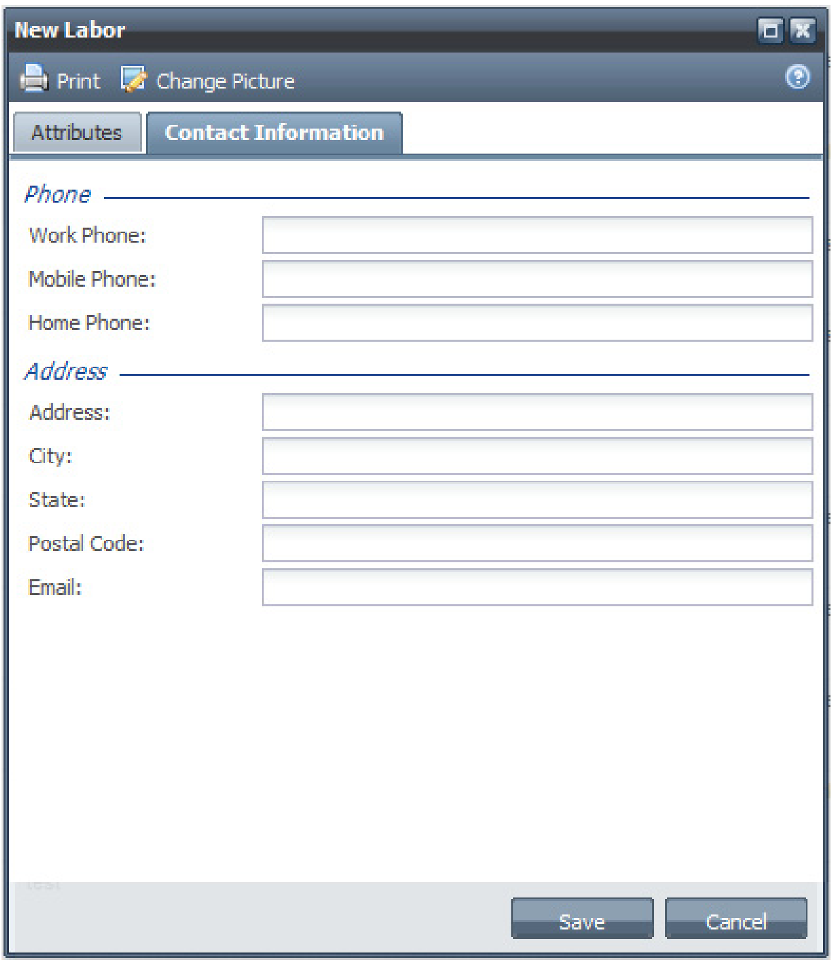
Type. Use to categorize your labor types. Examples might include Vendor, In House, Contractor, etc. To add Types to the pick list, simply enter data directly into the Type field. Once a Type has been assigned to a labor record the Type will remain in the list for future use. If a Type is no longer assigned to at least one labor record, it will be removed from the pick list.

Tier 1 Assignment. Use to assign a business unit to the labor provider.

Start Time / End Time. Use to identify the labor provider's working hours.

Contact Information Tab

Figure 8—Contact Information Tab, New Labor Form



Phone. Use the phone fields to store phone numbers associated to the labor provider.

Address. Use the address fields to store address information related to the labor provider.

Email. The email address, or addresses entered here are used in conjunction with work order email notifications.

Note: *If entering more than one email address, separate the entries with a semi-colon.*
EX: rbell@ssfm.com; bsmith@ssfm.com; jtaylor@ssfm.com

Managing Labor Records

Add/Remove labor records

Create labor records from existing contacts

Choose people and vendors from your Evolve Contact list and add them to your Labor list.

1. Display the Labor grid.
2. On the Labor grid, click Add.
3. On the Select Labor form, select an existing contact record(s) from the list.
4. Click Save to add the contact(s) to the labor grid list.

Add new labor records

All new labor records will be automatically added to your Evolve Contact list.

1. Display the Labor grid.
2. On the Labor grid, click Add.
3. On the Select Labor form, click New.
4. On the New Labor form, select Person or Company to identify the labor record type.
5. Enter data into the required fields as needed:

- First Name/Last Name - REQUIRED if your labor record type is a person.
- Company - REQUIRED if your labor record type is a company.

6. All other data fields are optional. Enter data as needed, or leave the fields empty.
7. Click Save. The new labor record will be added to the Labor grid and to the Contacts grid.

Remove a labor record

1. Display the Labor Grid.
2. In the Labor Grid, select the labor record(s) to be removed.
3. Click Remove.
4. Click Yes to confirm the removal.

NOTE: The labor record will be removed but its associated contact record will remain in the Evolve Contacts list.

Group labor by type

Grouping your labor by type can be useful for sorting and reporting purposes. Use the Type field located on the Labor form and the New Labor form to group your labor by type. Labor Type examples might include:

- In House
- Vendor
- Contractor

1. On the Labor form or on the New Labor form, in the Type pick list, select an existing type from the list, or enter a new value to add it to the selection list.

2. Click Save.

Note: *Once a Type has been assigned to a labor record the Type will remain in the pick list for future use. If a Type is no longer assigned to at least one labor record, it will be removed from the pick list.*

Assign labor to a trade

1. Display the Labor form.
2. Click the Trades tab.
3. Click Add.
4. On the Select Trade form, select a trade(s) to assign to the labor record.
5. Click Save on the Select Trade form.
6. Click Save on the Labor form.

Assign labor to a location (property)

1. Display the Labor form.
2. Click the Locations tab.
3. Click to select a property location(s).
4. Click Save.

Configure labor to filter assignment selection

Trades can be used in conjunction with Locations to filter labor assignment selection lists to labor records assigned to the same trade and location as the work order.

1. Display the Labor form.
2. Click the Trades tab.
3. Click Add.
4. On the Select Trade form, select a trade(s) to assign to the labor record.
5. Click Save on the Select Trade form.
6. Click the Locations tab.
7. Click to select a property location(s).
8. Click Save on the Labor form.

Configure labor to track labor costs

The Financials tab located on the Labor form is used to set the financial rates associated to a labor provider.

1. Display the Labor form.
2. Click the Financials tab.
3. In the Rates section of the form, enter the labor rate data as needed.
4. If utilizing markup charges, enter a markup value in the Percent Markup text box.
5. Click Save.

Print/Export the Labor Grid List

Print the labor grid list

1. On the Labor Grid toolbar, click More Actions.
2. Click Print List.

Export the labor grid list to EXCEL

1. On the Labor Grid toolbar, click More Actions.
2. Click Export List.

11: Materials

About Materials

Materials Classification Hierarchy Structure

Units of Measure List

Locations List

Materials Grid

Materials Form

Managing Your Materials

About Materials

Materials can be used to quantify, track, and calculate material costs associated to an Evolve work order.

Materials Grid

The Materials Grid displays a list of all material records in EvolveFM.

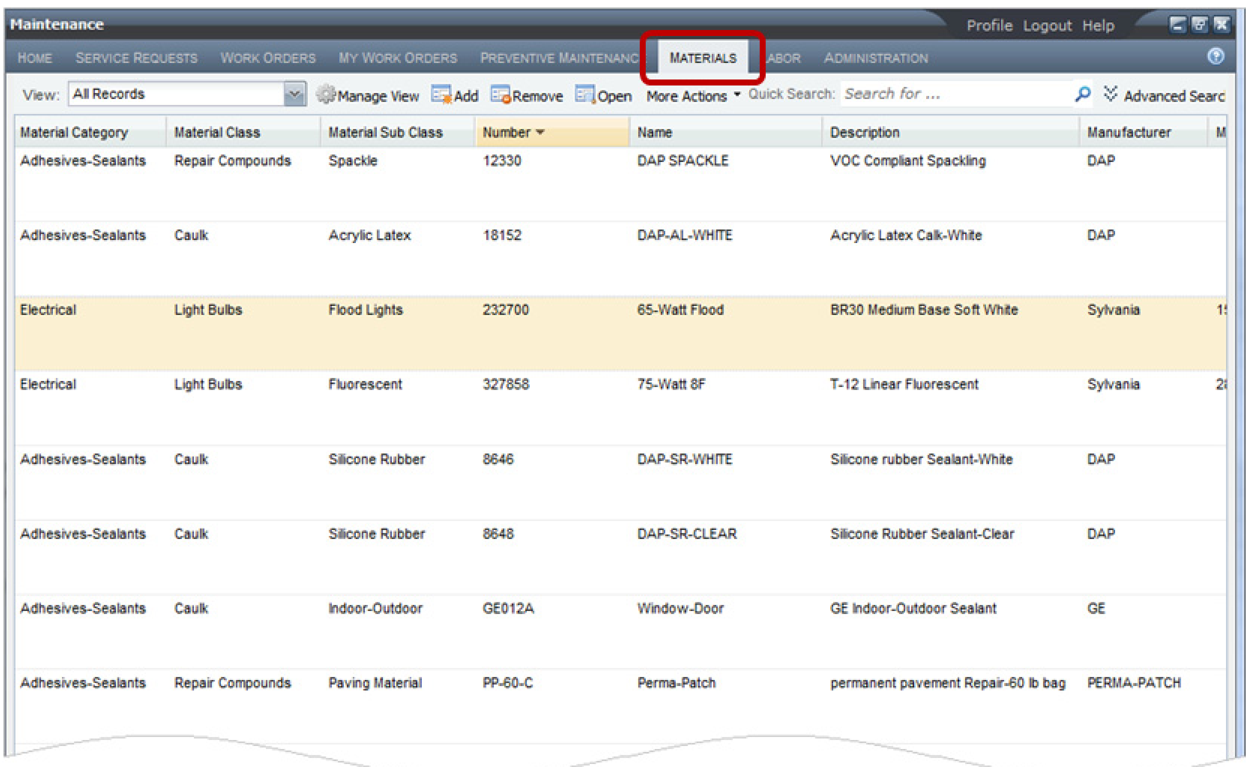
Use the Materials Grid to:

- Retrieve a list of all materials
- Open the Material form to a specific material record
- Add/Remove material records

To Display the Material Grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Materials tab.

Figure 1—Materials Grid



Materials Form

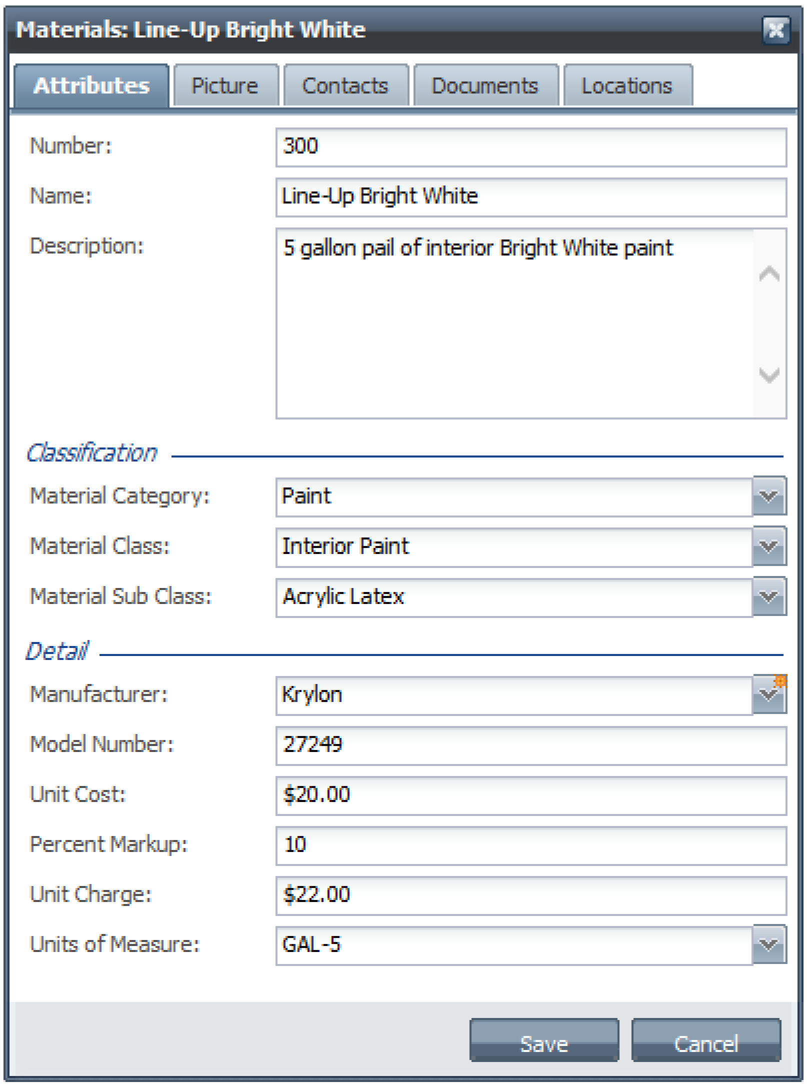
The Materials form is used to manage material data in Evolve.

To Open the Materials Form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Materials tab.
3. Do one of the following:

- Select a Material record in the grid list and then click Open.
- Double-click a Material record in the grid list.

Figure 2—Materials Form, Attributes Tab



Attributes Tab

The Name field is the only required material data field, all other data fields on the Material form are optional and can be used only if you choose to track this information.

Number. Use to store the material part number (alphanumeric).

Name. Use to identify the material record (required).

Note: *Each name must be unique to the Materials list (no duplicate values).*

Description. Use to enter a description of the material.

Material Category, Material Class, Material Sub Class. The material classification assignments can be used to categorize the material for sorting and reporting purposes. To utilize this data on the Materials form, you must first populate the Materials Classification Hierarchy structure lookup lists.

Manufacturer. The Manufacturer pick list is used to identify the material manufacturer. To add manufacturers to the pick list, simply enter data directly into the Manufacturer field. Once a manufacturer has been assigned to a Material, the manufacturer will remain in the list for future use. If a manufacturer is no longer assigned to at least one Material, it will be removed from the pick list.

Model Number. Use to store the material model number (alphanumeric).

Unit Cost. The Unit Cost entered here is used together with the Percent Markup value to calculate the Unit Charge amount. To determine how much to charge for the material used on a work order, the Unit Cost is multiplied by the Percent Markup value and the result is used as the Unit Charge value.

Percent Markup. The value entered into the Percent Markup field is used together with the Unit Cost value to calculate the Unit Charge amount.

Unit Charge. (read-only) The Unit Charge data is used to calculate the material cost associated to a work order. The value displayed here will be multiplied by the material quantity entered on a work order to calculate the total material cost.

Units of Measure. Use to assign a measurement type to the material. To utilize this data on the Materials form, you must first populate the Units of Measure lookup list.

Picture Tab

Use the Picture tab to add an image of the material. To utilize this tab, you must first load the image into Evolve using the Documents module or the Pictures Module.

Contacts Tab

The Contacts tab can be used to assign existing Evolve contact records to the Material record.

Documents Tab

Use the Documents tab to add a document file(s) to the material record. To utilize this tab, you must first load the document file(s) into Evolve using the Documents module.

Locations Tab

Use the Locations tab to assign a material storage location(s) to the material record. A material location assignment can be used to identify where the material is stored within your organization. To utilize this data on the Materials form, you must first populate the Location lookup list.

Managing Material Records

Add a material record

1. Display the Material grid.
2. On the Material grid, click Add.
3. On the Materials form, in the Name text box enter the name of the material (required).
4. All other data fields are optional. Enter data as needed, or leave the fields empty.
5. Click Save.

Configure material to track material costs

The Details section of the material form is used to set the costs associated to a material. The cost assigned to a material record will be used in conjunction with the material quantity entered on a work order to calculate the material costs associated to a work order.

1. Display the Material form.
2. On the Attributes tab, in the Cost text box, enter the cost of the material.
3. If utilizing markup cost, enter a markup value in the Percent Markup text box.
4. In the Units of Measure pick list, select a unit of measure (optional).
5. Click Save.

Add an image of the material

To utilize this feature, you must first load the image into Evolve using the Documents module or the Pictures module.

1. Display the Material form.
2. Click the Picture tab.
3. Click Change Picture.
4. On the Select Picture form, click to select a picture record.
5. Click Save on the Select Picture form.
6. Click Save on the Materials form.

Add contacts to the material

1. Display the Material form.
2. Click the Contacts tab.
3. Click Add.
4. On the Select Contacts form, click to select a contact record(s).
5. Click Save on the Select Contacts form.
6. Click Save on the Materials form.

Assign material to a storage location

To utilize this data on the Materials form, you must first populate the Location lookup list.

1. Display the Material form.
2. Click the Locations tab.
3. Click Add.
4. On the Select Locations form, click to select a location record(s).
5. Click Save on the Select Locations form.
6. Click Save on the Materials form.

Remove a material record

1. Display the Material grid.
2. In the Material grid, select the material record(s) to be removed.
3. Click Remove.
4. Click Yes to confirm the removal.

Print the material grid list

1. On the Material grid toolbar, click More Actions.
2. Click Print List.

Export the material grid list to EXCEL

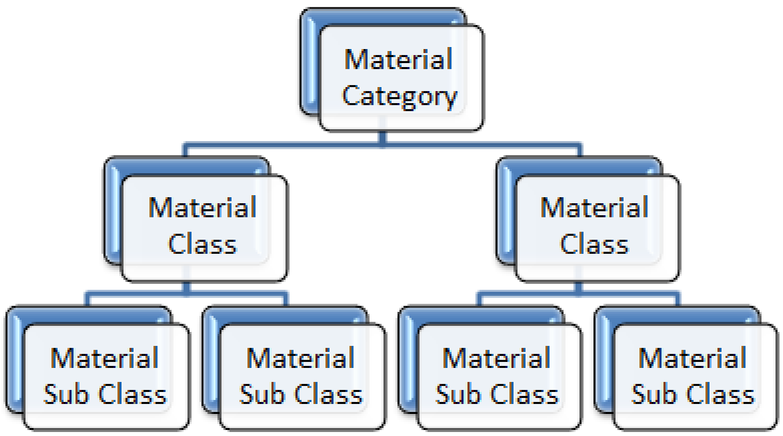
1. On the Materials grid toolbar, click More Actions.
2. Click Export List.

Material Classification Hierarchy Structure

The material classification hierarchy can be used to classify materials used in your organization for sorting and reporting purposes. The three tiers of the hierarchy include:

- Material Category
- Material Class
- Material Sub Class

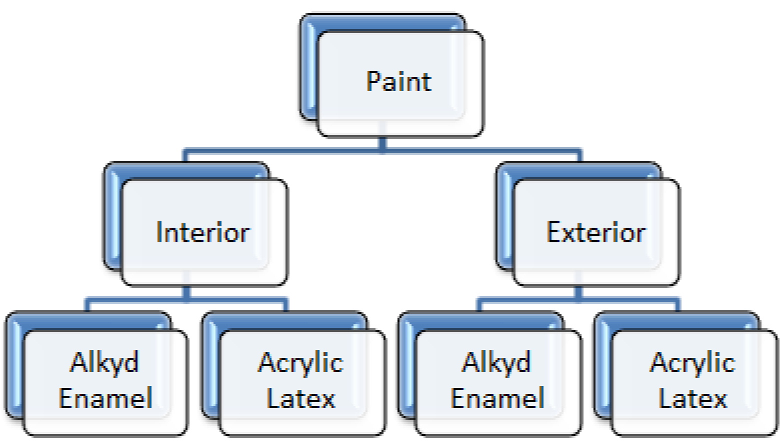
Figure 3—Material Classification Hierarchy



Parent/Child Relationship

The top tier of the hierarchy, Material Category is designed to be used first; items from the Material Class tier are then assigned to the Material Category tier. This assignment is known as a Parent/Child relationship where Material Category is the *parent* of Material Class. The Material Sub Class tier is used last in the hierarchy. Items in the Material Sub Class tier are assigned to an item in their parent tier, Material Class.

Figure 4—Material Classification Hierarchy Example



Each tier of the material classification hierarchy, beginning with the Material Category tier, can be assigned to a material record.

Material Category

Material Category is the top tier in the Material classification hierarchy. If you choose to use the classification hierarchy to organize and classify your materials, this tier will be used and assigned first.

Material Category Grid

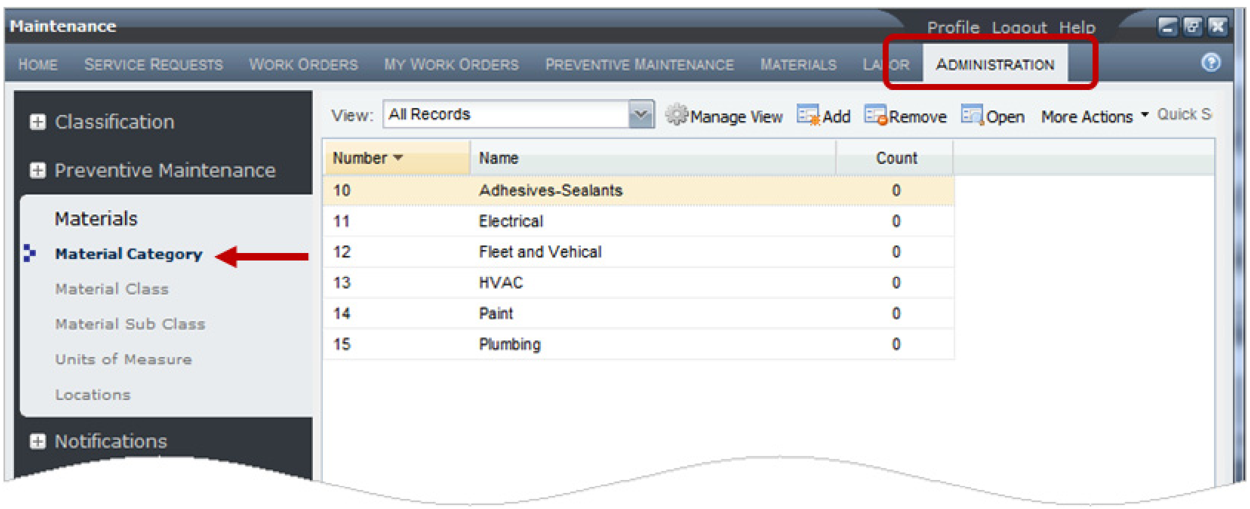
Use the material category grid to:

- Retrieve a list of all Material Category records
- Add a new Material Category record
- Open the Material Category form to a specific Material Category record

To display the material category grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Materials menu list, click Material Category.

Figure 5—Material Category Grid List



Note: *The Count column located on the Material Category grid list displays the number of instances the material category has been assigned to a work order.*

Material Category Form

The Material Category form is used to configure material category records in EvolveFM.

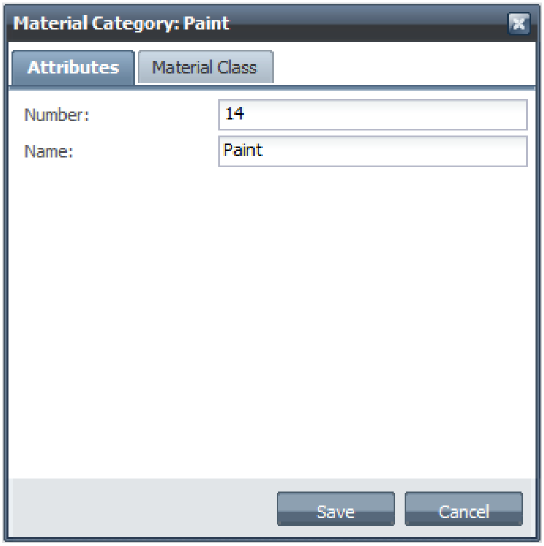
To display the material category form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Materials menu list, click Material Category to display the Material Category grid.

4. Do one of the following:

- Click Add to open the Material Category form to a new record.
- Select an existing material category record in the grid list and then click Open.

Figure 6—Material Category Form, Attributes Tab



Attributes Tab

Number. The Number field can be used to help organize your Material Category records (optional).

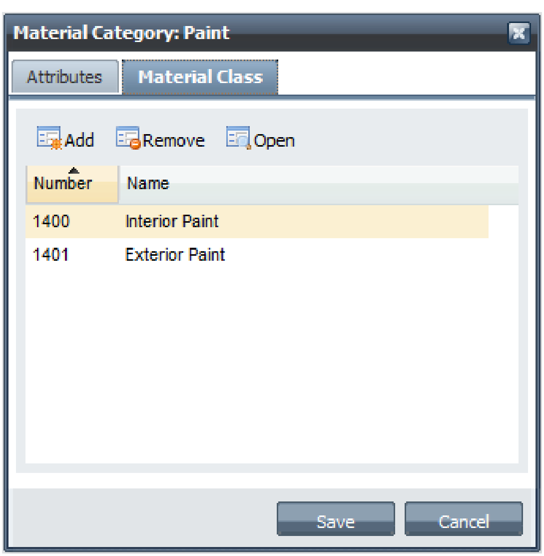
Name. The Name field is used to identify the Material Category record (required).

Note: *Each Name must be unique to the Material Category list (no duplicate values).*

Material Class tab

The Material Class tab is used to assign selected material class records to a material category.

Figure 7—Material Class Tab, Material Category Form



Add. Use the Add button to open the Select Material Class form and select the Material Class records to be assigned to the Material Category.

Remove. Use the Remove button to remove a selected Material Class record from the Materials Class tab.

Open. Use the Open button to open the Material Class form to the selected Material Class record.

Managing Your Material Category List

Display the Material Category grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Category.

Add a new Material Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Category.
3. Click the Add button on the Material Category grid list to open the Material Category form.
4. In the Number text box, enter the Material category number.
5. In the Name text box, enter the name of the Material category (required).
6. If needed, use the Material Class tab to assign one or more Material Class records to this Material Category.
7. Click Save on the Material Category form.

Edit a Material Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Category.
3. In the Material Category grid list, click the Material category record to be edited.
4. Click the Open button on the Material Category grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Material Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Category.
3. In the Material Category grid list, click the Material category record to be removed.
4. Click the Remove button on the Material Category grid list.

Assign a Material Class record to a Material Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Category.
3. On the Material Category grid list do one of the following to open the Material Category form:

- Click the Add button.

- Select a record in the Material Category grid list, and then click the Open button.

4. On the Material Category form, click the Material Class tab.
5. Click Add.
6. In the Select Material Class list, select one or more Material class records.
7. Click Save on the Select Material Class list.
8. Click Save on the Material Category form.

Remove a Material Class record from a Material Category record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Category.
3. In the Material Category grid list, click the Material category record to be edited.
4. Click the Open button on the Material Category grid list.
5. On the Material Category form, click the Material Class tab.
6. Select the Material Class record(s) to be removed.
7. Click Remove.
8. Click Yes to confirm the removal.
9. Click Save.

Material Class

Material Class is the second tier in the Material classification hierarchy and can be used to further classify materials in Evolve. If you choose to use the Material Class tier, each material class record must be assigned to a record in its parent tier, Material Category.

Material Class Grid

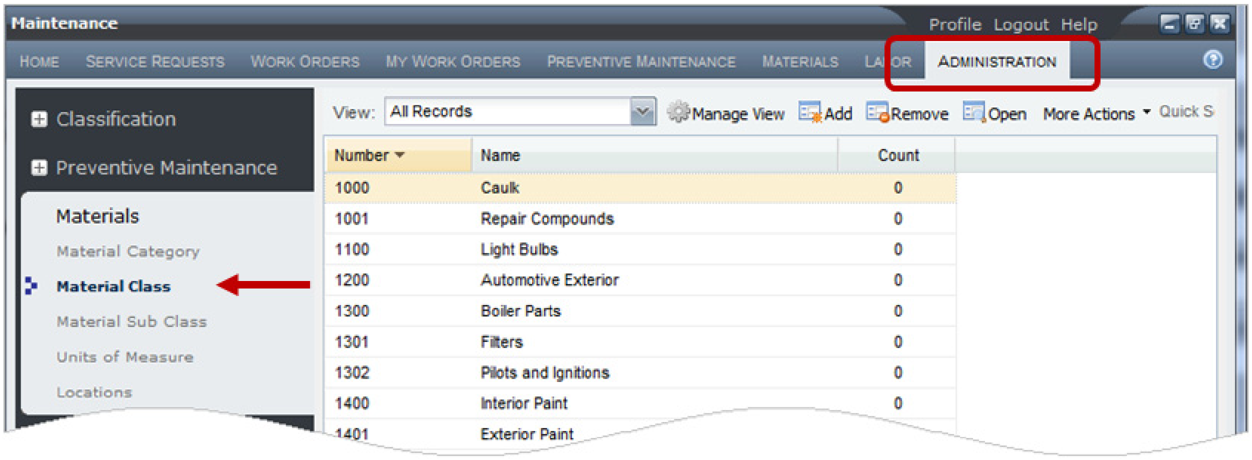
Use the material class grid to:

- Retrieve a list of all Material Class records
- Add a new Material Class record
- Open the Material Class form to a specific Material Class record

To display the material class grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Materials menu list, click Material Class.

Figure 8—Material Class Grid List



Note: *The Count column located on the grid list displays the number of instances the Material Class has been assigned to a work order.*

Material Class Form

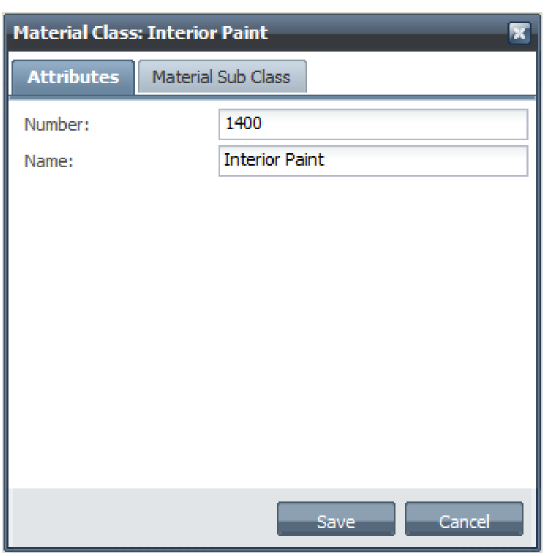
The Material Class form is used to configure material class records in EvolveFM.

To display the material class form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Materials menu list, click Material Class to display the Material Class grid.
4. Do one of the following:

- Click Add to open the Material Class form to a new record.
- Select an existing material class record in the grid list and then click Open.

Figure 9—Material Class Form, Attributes Tab



Attributes Tab

Number. The Number field can be used to help organize your Material Class records (optional).

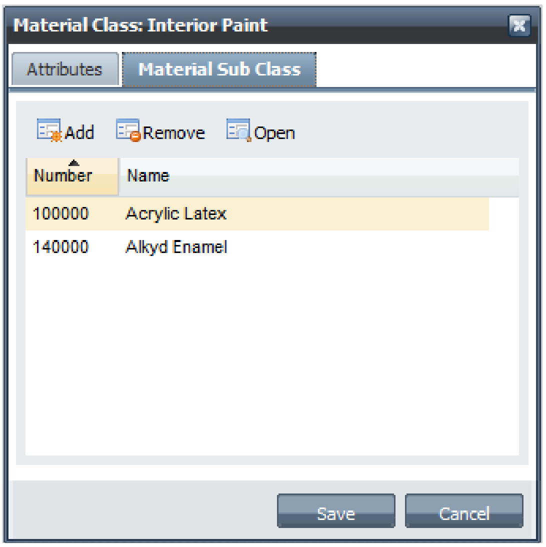
Name. The Name field is used to identify the Material Class record (required).

Note: *Each Name must be unique to the Material Class list (no duplicate values).*

Material Sub Class tab

The Material Sub Class tab is used to assign selected material sub class records to a material class.

Figure 10—Material Sub Class Tab, Material Class Form



Add. Use the Add button to open the Select Material Sub Class form and select the Material Sub Class records to be assigned to the Material Class.

Remove. Use the Remove button to remove a selected Material Sub Class record from the Materials Sub Class tab.

Open. Use the Open button to open the Material Sub Class form to the selected Material Sub Class record.

Managing Your Material Class List

Display the Material Class grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Class.

Add a new Material Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Class.
3. Click the Add button on the Material Class grid list to open the Material Class form.
4. In the Number text box, enter the Material Class number
5. In the Name text box, enter the name of the Material Class (required).

6. If needed, use the Material Sub Class tab to assign one or more material sub class records to this Material Class
7. Click Save.

Edit a Material Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Class.
3. In the Material Class grid list, click the Material Class record to be edited.
4. Click the Open button on the Material Class grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Material Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Class.
3. In the Material Class grid list, click the Material Class record to be removed.
4. Click the Remove button on the Material Class grid list.

Assign a Material Sub Class record to a Material Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Class.
3. On the Material Class grid list do one of the following to open the Material Class form:

- Click the Add button.
- Select a record in the Material Class grid list, and then click the Open button.

4. On the Material Class form, click the Material Sub Class tab.
5. Click Add.
6. In the Select Material Sub Class list, select one or more material sub class records.
7. Click Save on the Select Material Sub Class list.
8. Click Save on the Material Class form.

Remove a Material Sub Class record from a Material Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Class.
3. In the Material Class grid list, click the Material class record to be edited.
4. Click the Open button on the Material Class grid list.
5. On the Material Class form, click the Material Sub Class tab.
6. Select the Material Sub Class record(s) to be removed.
7. Click Remove.
8. Click Yes to confirm the removal.

9. Click Save.

Material Sub Class

The Material Sub Class tier is the third, and final tier of the Material classification hierarchy. If you choose to use the Material Sub Class tier, each material sub class record must be assigned to a record in its parent tier, Material Class.

Material Sub Class Grid

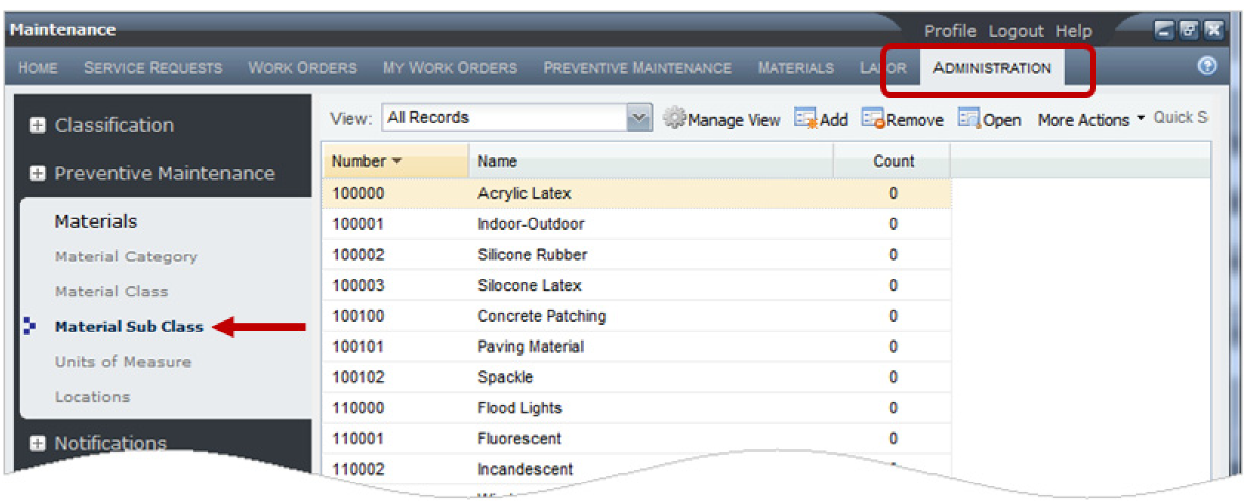
Use the material sub class grid to:

- Retrieve a list of all Material Sub Class records
- Add a new Material Sub Class record
- Open the Material Sub Class form to a specific Material Sub Class record

To display the material sub class grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Materials menu list, click Material Sub Class.

Figure 11—Material Sub Class Grid List



Note: *The Count column located on the grid list displays the number of instances the material sub class has been assigned to a work order.*

Material Sub Class Form

The Material Sub Class form is used to configure material sub class records in EvolveFM.

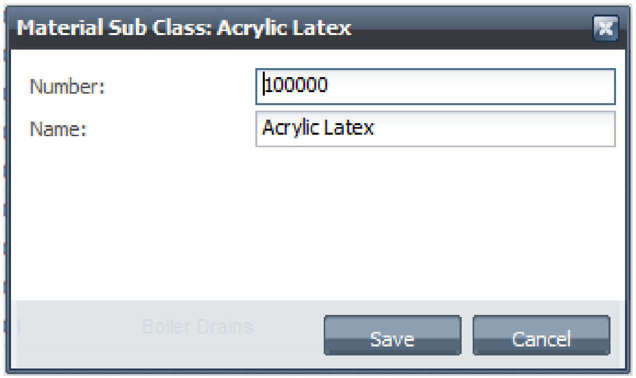
To display the material sub class form:

1. Double-click the Maintenance icon on the EvolveFM desktop.

2. Click the Administration tab.
3. In the Materials menu list, click Material Sub Class to display the Material Sub Class grid.
4. Do one of the following:

- Click Add to open the Material Sub Class form to a new record.
- Select an existing material sub class record in the grid list and then click Open.

Figure 12—Material Sub Class Form



Number. The Number field can be used to help organize your material sub class records (optional).

Name. The Name field is used to identify the material sub class record (required).

Note: *Each name must be unique to the Material Sub Class list (no duplicate values).*

Managing Your Material Sub Class List

Display the Material Sub Class grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Sub Class.

Add a new Material Sub Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Sub Class.
3. Click the Add button on the Material Sub Class grid list to open the Material Sub Class form.
4. In the Number text box, enter the Material Sub Class number.
5. In the Name text box, enter the name of the Material Sub Class (required).
6. Click Save.

Edit a Material Sub Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Sub Class.
3. In the Material Sub Class grid list, click the Material Sub Class record to be edited.
4. Click the Open button on the Material Sub Class grid list.

5. Edit the record data as needed.
6. Click Save.

Remove a Material Sub Class record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Material Sub Class.
3. In the Material Sub Class grid list, click the Material Sub Class record to be removed.
4. Click the Remove button on the Material Sub Class grid list.

Units of Measure List

The Units of Measure lookup list stores the measurement values that will be available for selection in the following maintenance component forms:

- Materials Form
- Reading Form

Units of Measure Grid

Use the units of measure grid to:

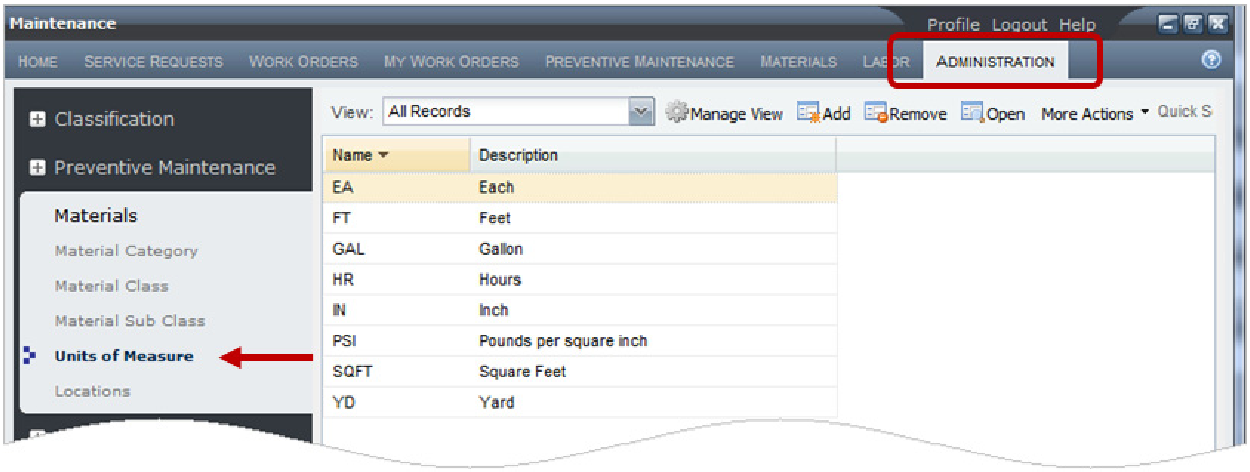
- Retrieve a list of all Units of Measure records
- Add a new Units of Measure record
- Open the Units of Measure form to a specific Units of Measure record

To display the units of measure grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.

3. In the Materials menu list, click Units of Measure.

Figure 13—Units of Measure Grid



Units of Measure Form

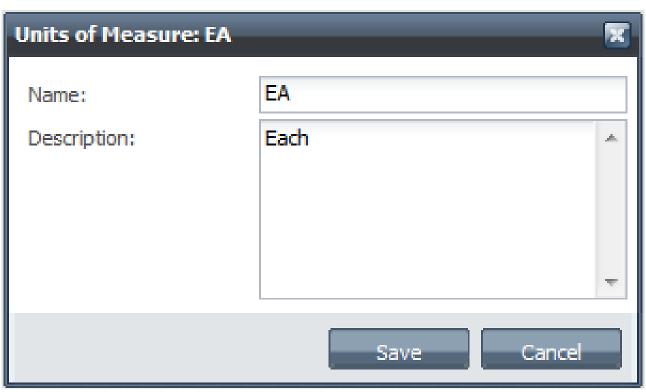
The Units of Measure form is used to configure units of measure records in EvolveFM.

To display the units of measure form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Materials menu list, click Units of Measure to display the Units of Measure grid.
4. Do one of the following:

- Click Add to open the Units of Measure form to a new record.
- Select an existing units of measure record in the grid list and then click Open.

Figure 14—Units of Measure Form



Name. The Name field is used to identify the unit of measure record (required).

Note: *Each name must be unique to the Unit of Measure list (no duplicate values).*

Description. The Description field can be used to further describe the unit of measure value (optional).

Managing Your Unit of Measure List

Display the Unit of Measure grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Unit of Measure.

Add a new Unit of Measure record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Unit of Measure.
3. Click the Add button on the Unit of Measure grid list to open the Unit of Measure form.
4. In the Name text box, enter the name of the Unit of Measure (required).
5. In the Description text box, enter a description of the unit of measure (optional).
6. Click Save.

Edit a Unit of Measure record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Unit of Measure.
3. In the Unit of Measure grid list, click the Unit of Measure record to be edited.
4. Click the Open button on the Unit of Measure grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Unit of Measure record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Unit of Measure.
3. In the Unit of Measure grid list, click the Unit of Measure record to be removed.
4. Click the Remove button on the Unit of Measure grid list.

Material Locations List

The Material Locations list stores a list of the material storage locations that will be available for selection on the Locations tab of the Materials form. Use the list to identify where materials are stored in your organization. Example locations may include:

- Supply closets
- Storage rooms
- Warehouse

Material Locations Grid

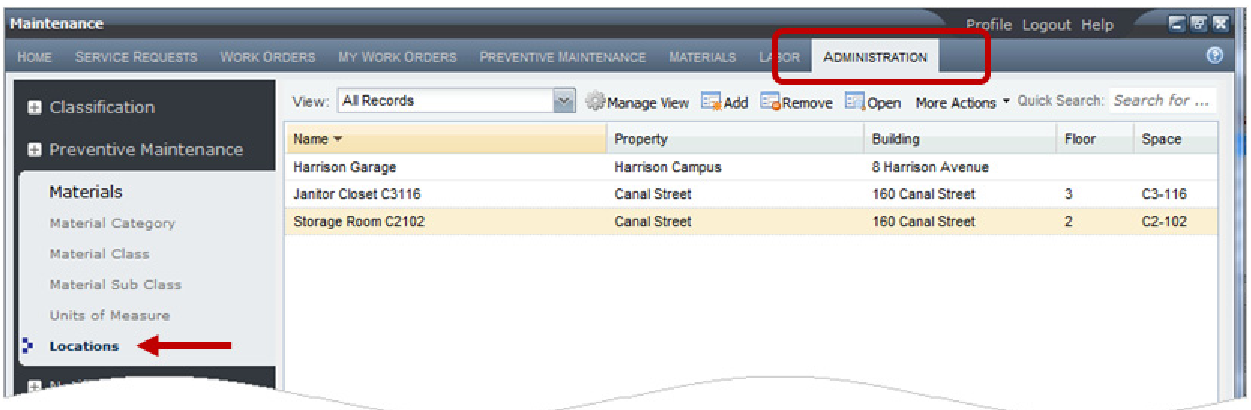
Use the location grid to:

- Retrieve a list of all Material Location records
- Add a new Material Location record
- Open the Location form to a specific Location record

To display the material location grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Materials menu list, click Locations

Figure 15—Material Locations Grid List



Location Form

The Location form is used to configure Material Location records in EvolveFM.

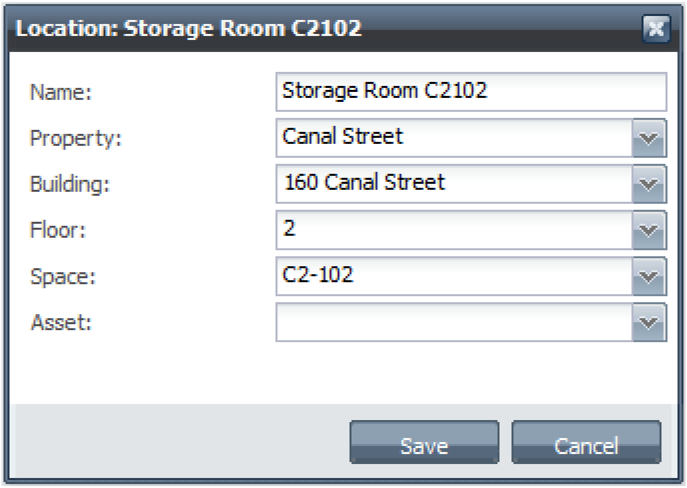
To display the location form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administration tab.
3. In the Materials menu list, click Locations to display the Material Locations grid.
4. Do one of the following:

- Click Add to open the Location form to a new record.

- Select an existing Location record in the grid list and then click Open.

Figure 16—Location Form



Name. The Name field is used to identify the location record (required).

Note: *Each name must be unique to the Material Location list (no duplicate values).*

Property. Use to select the Evolve property that contains the location (required).

Building. Use to select the Evolve building that contains this location (required).

Floor, Space, Asset. Use the Floor, Space, and Asset fields to further identify where the location is located.

Managing Your Locations List

Display the Locations grid list

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Locations.

Add a new Location record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Locations.
3. Click the Add button on the Locations grid list to open the Location form.
4. In the Name text box, enter the name of the Location (required).
5. In the Property pick list, select the property that contains the location (required).
6. In the Building pick list, select the building that contains the location (required).
7. Use the Floor, Space, and Asset pick lists to further identify the location (optional).
8. Click Save.

Edit a Locations record

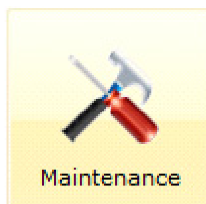
1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Locations.

3. In the Locations grid list, click the Locations record to be edited.
4. Click the Open button on the Locations grid list.
5. Edit the record data as needed.
6. Click Save.

Remove a Locations record

1. In Maintenance, click the Administration button on the menu.
2. In the Materials group, click Locations.
3. In the Locations grid list, click the Locations record to be removed.
4. Click the Remove button on the Locations grid list.

12: Email Notifications



About Email Notification

Maintenance Notification Setup

Managing Email Notifications

About Email Notifications

Email notification is available in the EvolveFM Professional platform which runs on SQL Server. Because of limitations in SQL Server Express, email notification is not available in the EvolveFM Starter platform which runs on SQL Server Express.

Note: *Before setting up your notifications in Evolve, contact your SQL Server administrator to confirm your SQL Sever is configured to allow notifications.*

What Triggers an Email?

Email notifications can be triggered in Evolve when the following events occur on a service request or work order.

- When a new service request or work order is created
- When a work order is closed out
- When the status of a service request or work order changes
- When a comment is added to a service request or work order
- When the completion date of a service request or work order is due within a set number of days

Who Can Be Notified?

Email notifications can be sent to the following people:

- The user who created the service request or work order.
- The designated labor providers.
- The designated supervisor labor providers.
- Designated people who need to be informed but are not a requester or labor provider.

Sample Notification

Figure 1—Sample Email Notification

Labor Evolve Service Request Notification

Evolve Administrator has changed the status of Service Request 35 to Assigned.

Number:	**35**
Requests Category:	**Move Management**
Request Class:	**Simple Move**
Job:	**Simple People Move**
Trade:	**General Maintenance**
Priority:	**3 - Medium**
Status:	**Assigned**
Response Due:	**Mar 27 2013 8:57AM**
Completion Due:	**Mar 29 2013 8:57AM**
Supervisor:	**John M Erickson**

Location:
Canal Street, 160 Canal Street, 3, C3-108

Description:
Need to get Rene into her new space...

SQL Server Configuration

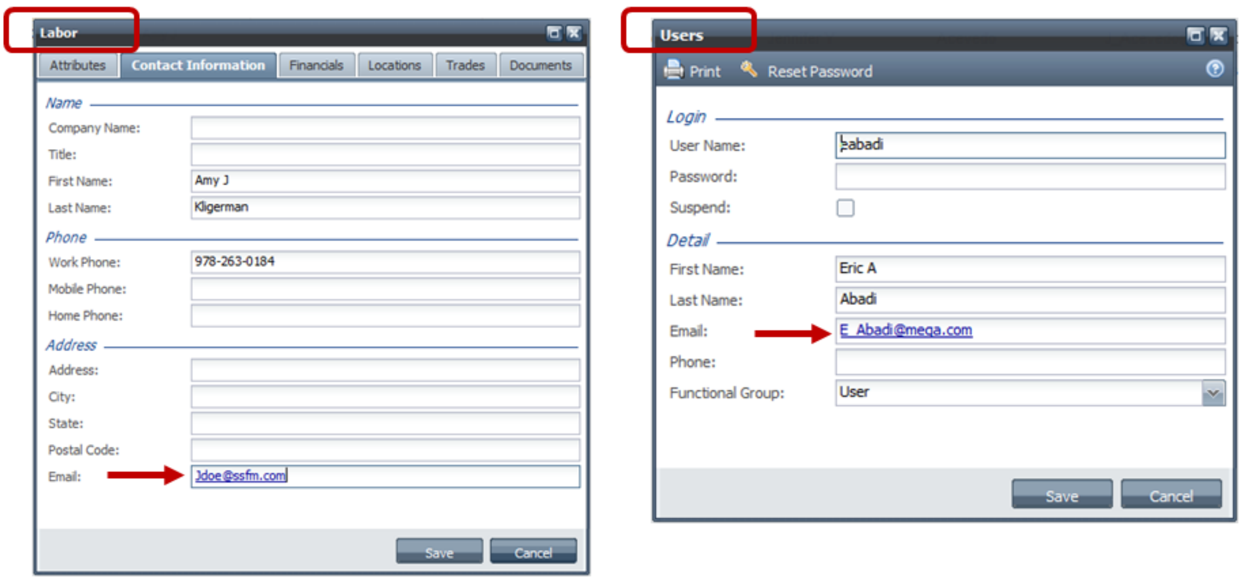
Check with your SQL Server administrator to confirm that the SQL Server running EvolveFM has been configured for email notification and has been set up with the required Evolve profile and account.

Email Address Configuration

An email address must be configured for each planned recipient of email notifications.

- Each Labor provider to be sent an email notification must have an email address entered into the Email field located on their Labor record.
- Each Requester to be sent an email notification must have an email address entered into the Email field located on their User record.

Figure 2—Labor and Users Forms



Note: *If entering more than one email address into the email field, separate the entries with a semi-colon. EX: rbell@ssfm.com; bsmith@ssfm.com; jtaylor@ssfm.com*

Maintenance Notification Setup

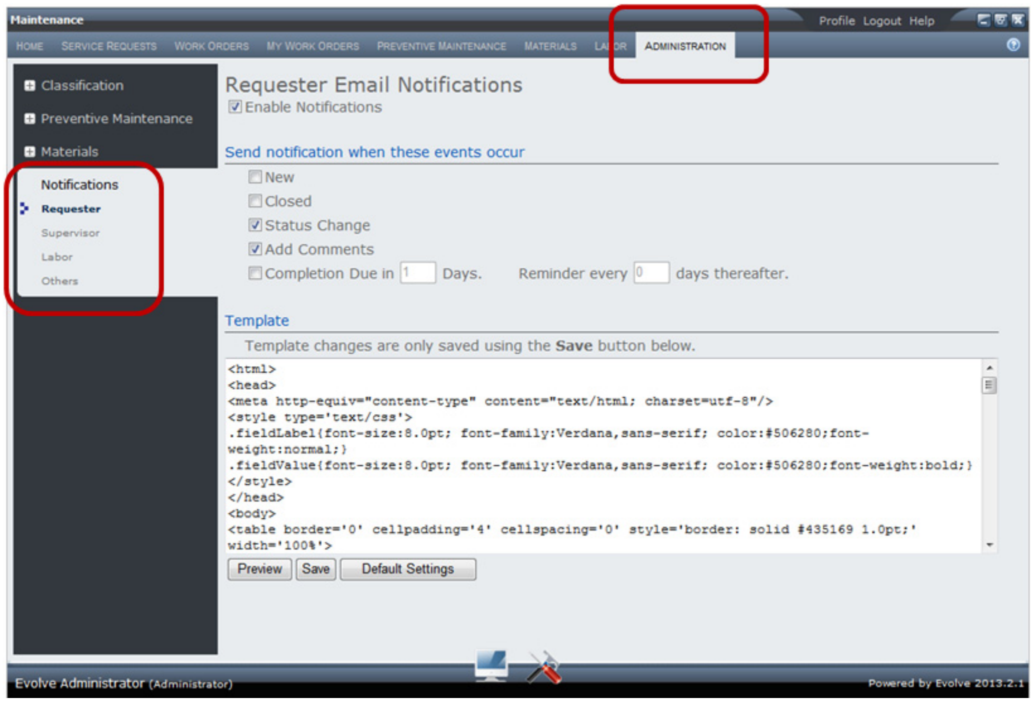
Evolve Maintenance Email Notification setup is done using Notifications within Maintenance Administration.

To display the notification controls:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Administrations tab.
3. Click Notifications to display the Recipient Type list.

4. Select a Recipient Type to display its Email Notification pane.

Figure 3—Email Notifications Setup



Recipient Types

Notification recipient types are located in the Notifications list located on the Maintenance Administration tab.

Requester. An Evolve user who is logged into Evolve and submits a Request, Service Request, or Work Order is identified as the Requester. The email address(es) configured on the Requester's Evolve User record is used for the notification.

Supervisor. An Evolve labor provider identified as a Supervisor. The email address(es) configured on the labor provider's Evolve Labor record is used for the notification.

Labor. An Evolve labor provider. The email address(es) configured on the labor provider's Evolve Labor record is used for the notification.

Others. People who need to be informed but are not a Requester, Supervisor, or Labor provider. The email address(es) entered into the email field located on the Others Email Notification pane is used for the notification.

Note: *When a recipient type is selected in the Notifications list its Email Notification pane is displayed.*

Enable Notifications

To enable notifications for a selected recipient type you must select the Enable Notifications check box. Until the check box is selected the recipient's notification controls will remain inactive.

Send notifications when these events occur

Use the notification event list to select when an email notification will be sent to the selected recipient type. When a check box is selected, an email will be sent to the recipient every time the selected event occurs on a service request or work order.

Notification Event Triggers

New. When a new service request or work order is created.

Closed. When a work oder status changes to Closed.

Status Change. When the status of a service request or work order changes.

Add Comments. When a new comment is added to a service request or work order.

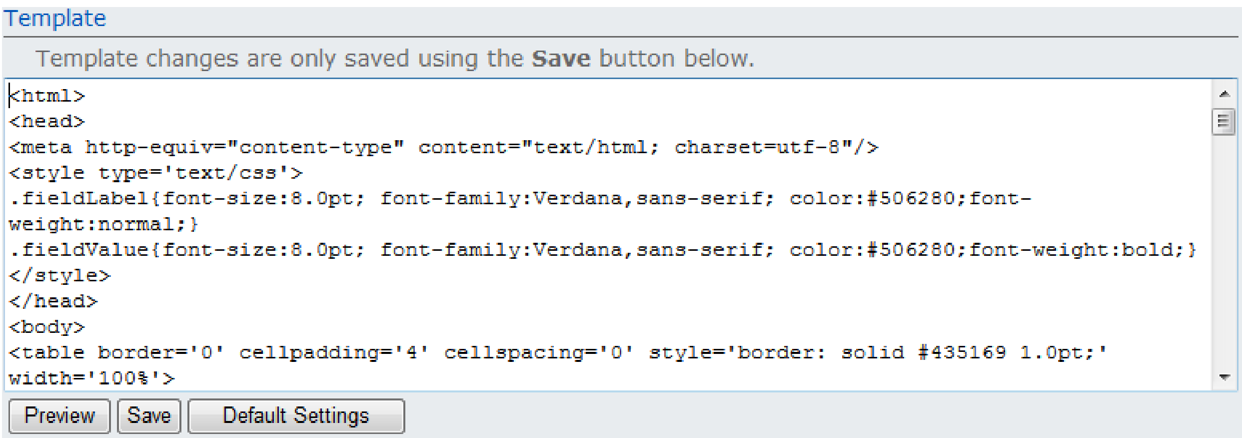
Completion Due. When the completion of a service request or work order is due within a set number of days. A reminder email can also be sent every set number of days after the completion date has passed.

Template

The email notification template can be used to customize the layout and appearance of the physical email. The appearance of the email is defined using the HTML code within the template.

Note: *A good understanding and working knowledge of HTML is recommended before editing the template.*

Figure 4—HTML Template Panel



Preview. Click the Preview button to view the HTML code as it will be displayed in an email.

Save. Click the Save button to save changes made to the HTML code in the template.

Default Settings. Click to reset the HTML code in the template back to its original default code.

Managing Email Notifications

Requester, Supervisor, & Labor Recipients

Notify the requester of the work

The email address(es) configured on the Requester's Evolve User record is used for the notification.

1. In the Maintenance component, click the Administration tab.
2. Click the Notifications group to expand the list.

3. Click Requester.
4. Click to select the Enable Notifications check box.
5. Select the notification event trigger(s) as needed.
6. If choosing the Completion Due event, enter a quantity in the Day text boxes as needed.

Note: *Settings will remain as set unless changed by a user. There is no Save required unless you are saving changes made to the Template.*

Notify the labor supervisor assigned to the work

The email address(es) configured on the labor provider's Evolve Labor record is used for the notification.

1. In the Maintenance component, click the Administration tab.
2. Click the Notifications group to expand the list.
3. Click Supervisor.
4. Click to select the Enable Notifications check box.
5. Select the notification event trigger(s) as needed.
6. If choosing the Completion Due event, enter a quantity in the Day text boxes as needed.

Note: *Settings will remain as set unless changed by a user. There is no Save required unless you are saving changes made to the Template.*

Notify the labor provider assigned to the work

The email address(es) configured on the labor provider's Evolve Labor record is used for the notification.

1. In the Maintenance component, click the Administration tab.
2. Click the Notifications group to expand the list.
3. Click Labor.
4. Click to select the Enable Notifications check box.
5. Select the notification event trigger(s) as needed.
6. If choosing the Completion Due event, enter a quantity in the Day text boxes as needed.

Note: *Settings will remain as set unless changed by a user. There is no Save required unless you are saving changes made to the Template.*

Other Recipients

Notify someone other than the requester or labor

The email address(es) entered into the email field located on the Others Email Notification pane is used for the notification.

1. In the Maintenance component, click the Administration tab.
2. Click the Notifications group to expand the list.
3. Click Others.
4. Click to select the Enable Notifications check box.
5. In the Send Notifications To text area, enter the email address or addresses that will receive the notification(s).

Note: *If entering more than one email address into the email field, separate the entries with a semi-colon. EX: rbell@ssfm.com; bsmith@ssfm.com; jtaylor@ssfm.com*

6. Select the notification event trigger(s) as needed.
7. If choosing the Completion Due event, enter a quantity in the Day text boxes as needed.

NOTE: Settings will remain as set unless changed by a user. There is no Save required unless you are saving changes made to the Template panel.

Customize the email template

1. In the Maintenance component, click the Administration tab.
2. Click the Notifications group to expand the list.
3. In the Recipient Type list, click a recipient type to display its email notification pane.
4. In the Template panel, edit the HTML code as needed.

Note: *A good understanding and working knowledge of HTML is recommended before editing the template.*

5. Click Preview to view a sample of your edited email.
6. Click Save to save the template.

13: Preventive Maintenance

About Preventive Maintenance

Preventive Maintenance Grid

Preventive Maintenance Form

Creating a Preventive Maintenance routine

About Preventive Maintenance

The Preventive Maintenance features in EvolveFM are used to define and manage scheduled maintenance routines for space and assets within your facility.

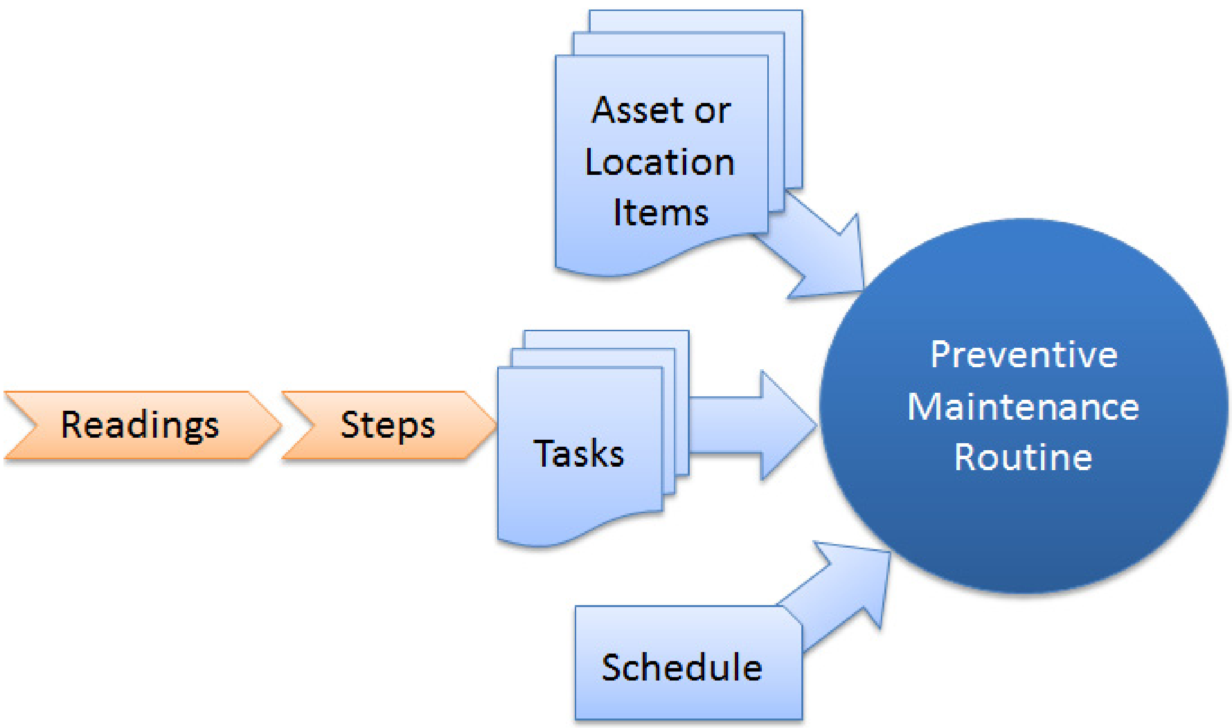
The Process

A Preventive Maintenance routine in EvolveFM requires a maintenance task, a work order item (asset, property, building, floor, or space), and a work order generation schedule.

The process of configuring a preventive maintenance routine in EvolveFM is as follows:

1. Create a new Preventive Maintenance routine.
2. Assign a task(s) to the routine.
3. Assign an item(s) to the routine (asset, property, building, floor, or space).
4. Define a work order generation schedule for the routine.

Figure 1— Preventive Maintenance Configuration



Preventive Maintenance Grid

The Preventive Maintenance Grid displays a list of all preventive maintenance records.

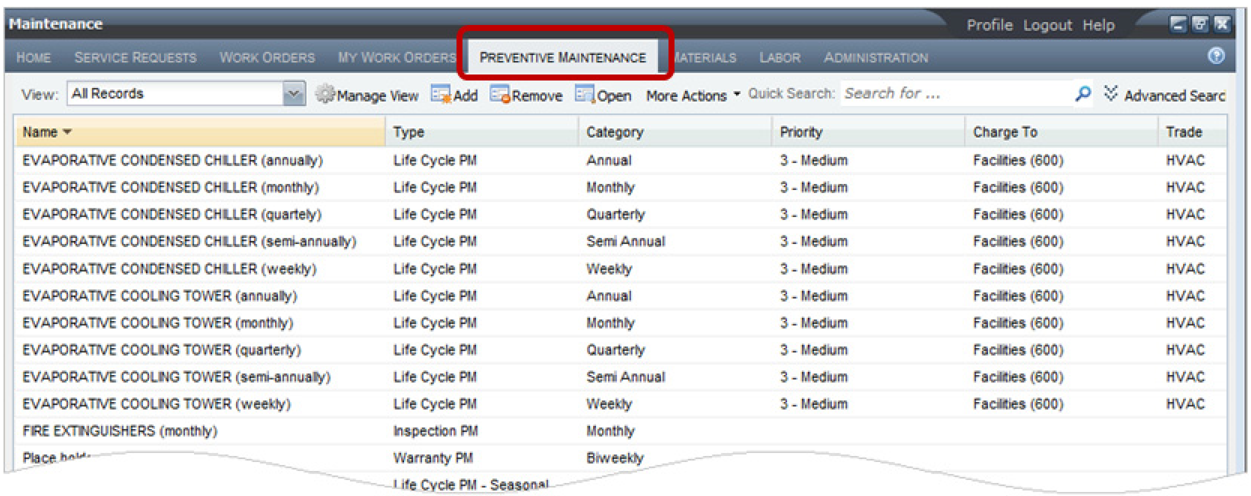
Use the Preventive Maintenance Grid to:

- Retrieve a list of all preventive maintenance routines
- Open the Preventive Maintenance form to a specific preventive maintenance record
- Add/Remove preventive maintenance records
- Print/Export the grid list

To Display the Preventive Maintenance Grid:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Preventive Maintenance tab.

Figure 2—Preventive Maintenance Grid



Preventive Maintenance Form

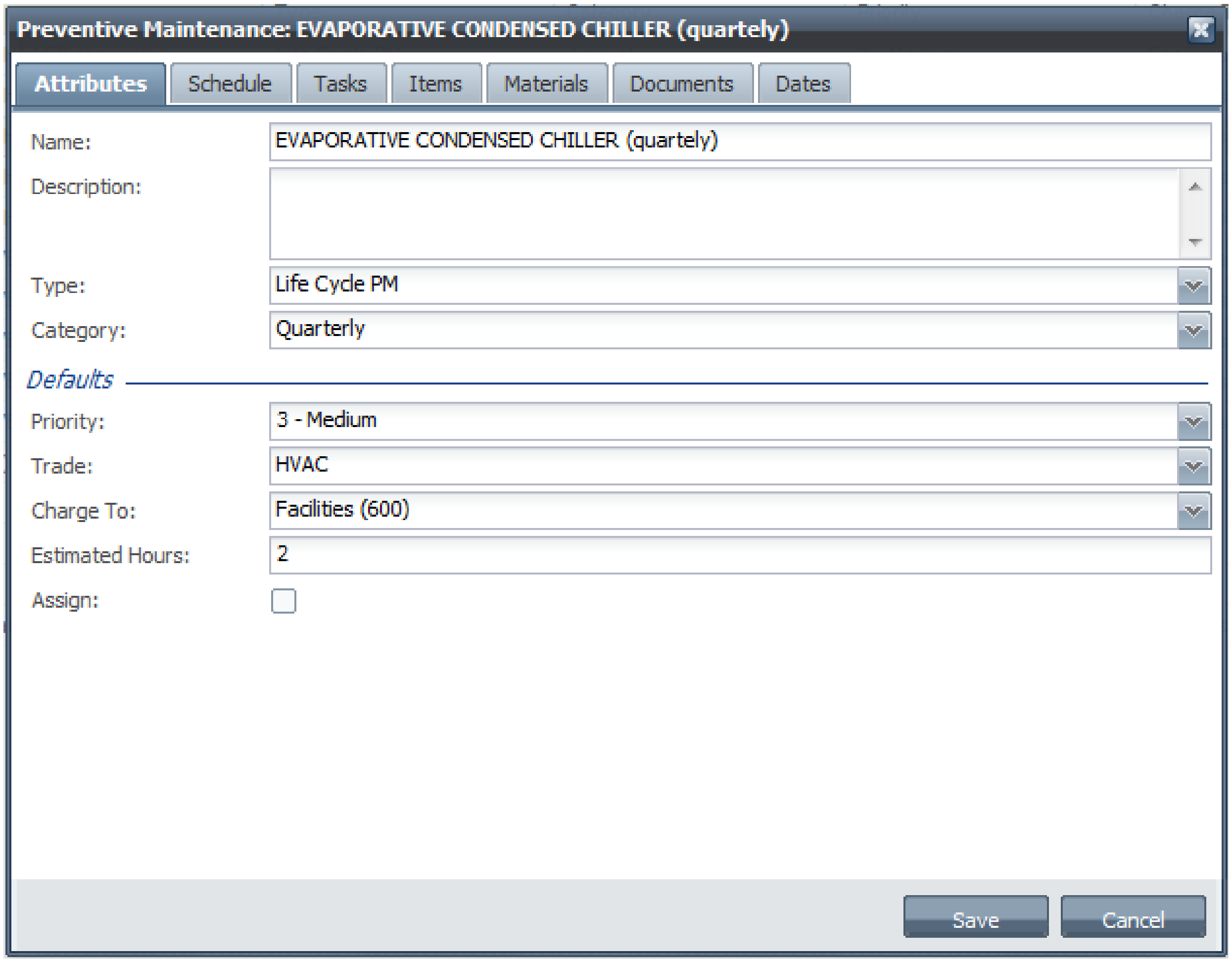
The Preventive Maintenance form is used to manage preventive maintenance routines in Evolve.

To Open the Preventive Maintenance Form:

1. Double-click the Maintenance icon on the EvolveFM desktop.
2. Click the Preventive Maintenance tab.
3. Do one of the following:

- Select a Preventive Maintenance record in the grid list and then click Open.
- Double-click a Preventive Maintenance record in the grid list.

Figure 3—Preventive Maintenance Form



Attributes Tab

Name. Use to identify the preventive maintenance record (required).

Description. Use to enter a description of the preventive maintenance routine.

Type. Use to group your preventive maintenance routines by type for sorting and reporting purposes. To add types to the pick list, simply enter data directly into the Type field. Once a type has been assigned to a preventive maintenance routine, the type will remain in the list for future use. If a type is no longer assigned to at least one preventive maintenance routine, it will be removed from the pick list.

Type examples might include:

- Life Cycle PM
- Inspection PM
- Warranty PM

Category. Use to categorize your preventive maintenance routines for sorting and reporting purposes. To add categories to the pick list, simply enter data directly into the Category field. Once a category has been assigned to a preventive maintenance routine, the category will remain in the list for future use. If a category is no longer assigned to at least one preventive maintenance routine, it will be removed from the pick list.

Category examples might include:

- Annually
- Biweekly
- Monthly-WINTER

Priority. Use to set the priority for the work order when it is generated. If the user does not assign a priority to a work order, Evolve will set the Medium priority as default.

Trade. Use to set the default trade for the work order when it is generated.

Charge To. Use to set the default Charge To information for the work order when it is generated.

Estimated Hours. Use to enter the estimated hours to perform this work.

Assign. Use to automatically assign the work order generated from the preventive maintenance routine to a labor provider.

About Automatic Labor Assignment

When the Assign check box is selected on the Attributes tab, the labor assignment filtering process is the same that is used in the Filtered Records section of the Assign to Labor form, with one exception:

- Evolve will automatically assign the *first* labor record it finds in the filtered records list.

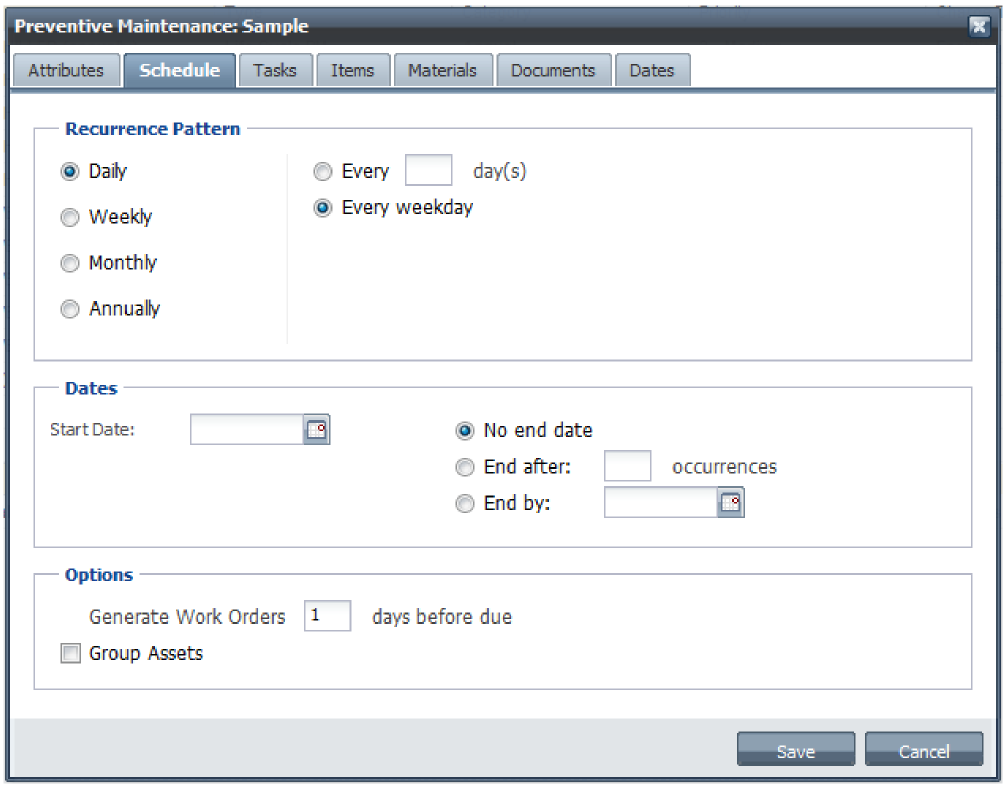
For example, if Alex Smith and Ben Smith are both filtered as labor providers, Alex Smith will *always* be the automatic labor assignment because “A” appears before “B” in the filtered records. This could become a problem for Alex since his work load would be much heavier than Ben’s.

Note: *The automatic assignment process works well if you only have one labor provider within a given trade and location, but if more than one labor provider is available, the first labor record will always be assigned to the work.*

Schedule Tab

The Schedule tab of the Preventive Maintenance form is used to configure the recurring work order generation schedule for the preventive maintenance routine.

Figure 4—Schedule Tab, Preventive Maintenance Form

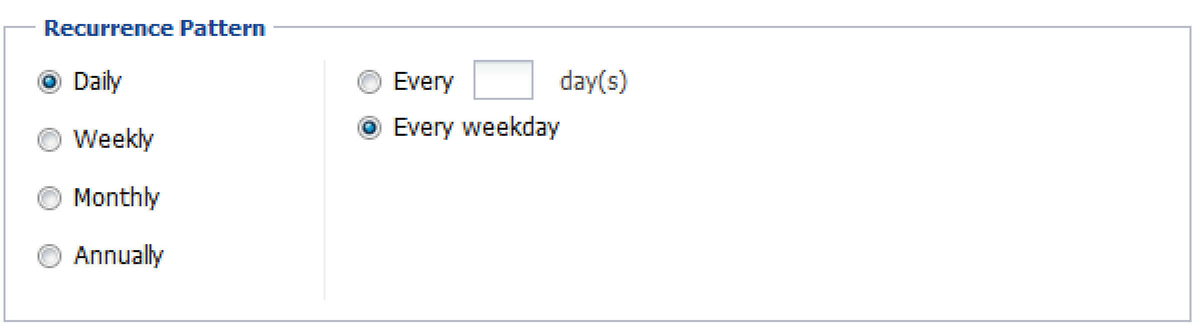


Recurrence Patterns

The Recurrence Pattern section of the Schedule tab is used to set the work order recurrence interval for the preventive maintenance routine. Recurrence pattern options will vary depending upon which recurring pattern (Daily, Weekly, Monthly, or Annually) is selected.

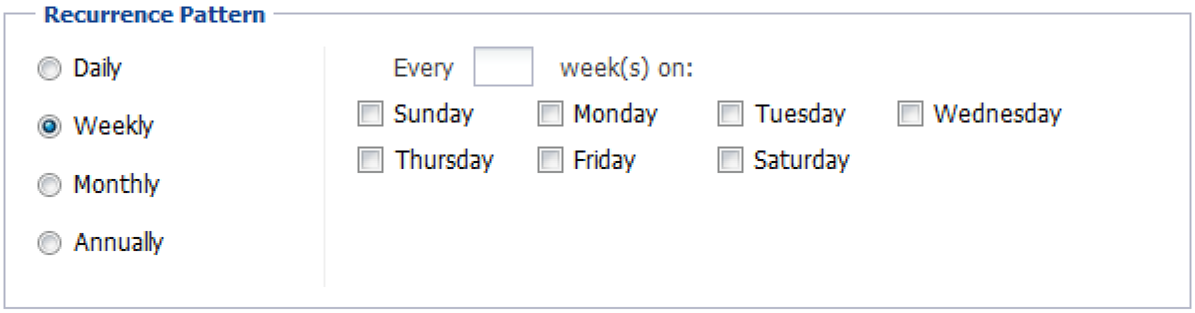
Daily Options

- **Every # day(s)** Sets the daily interval between work order recurrence. For example, a value of 3 will generate a new work order every three days.
- **Every weekday** Generates a new work order every Monday thru Friday, skipping the weekends.



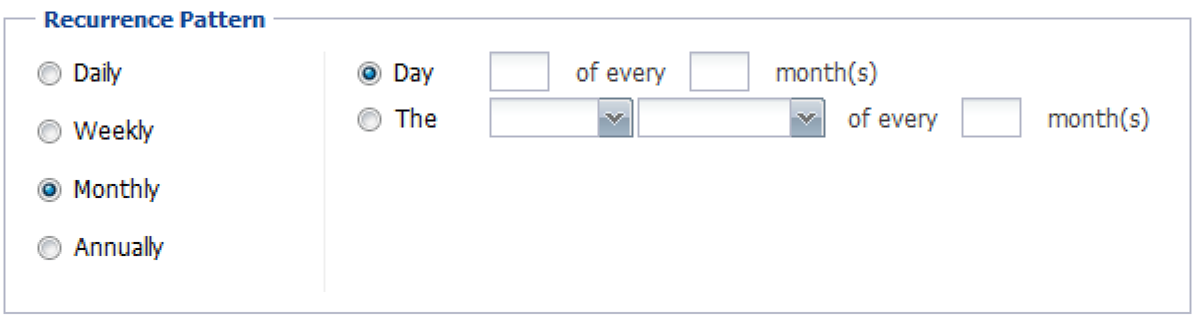
Weekly Options

- **Every # week(s) on:** Sets the weekly interval between work order recurrences. For example, Every 3 weeks on Friday.



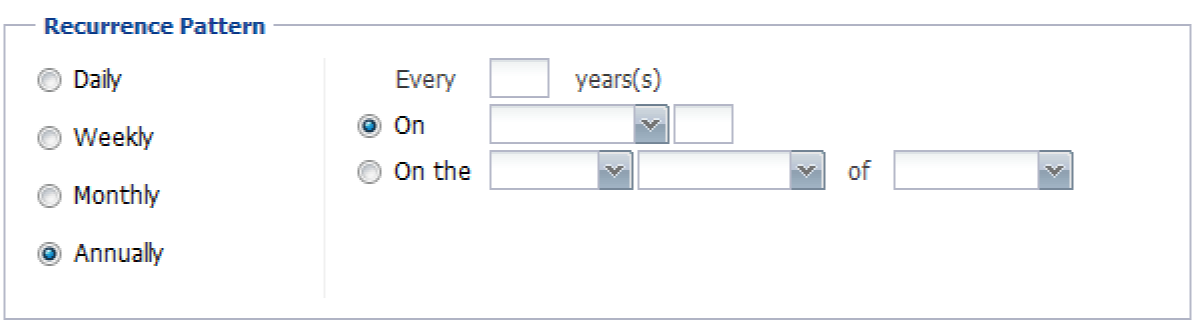
Monthly Options

- **Day # of every # month(s)** Sets the day of the month (regardless of which day of the week it lands on), and the monthly interval between work order recurrences. For example, Day 15 of every 3 months.
- **The [count] [day] of every # months** Sets the count of a selected day, and the monthly interval between work order recurrences. Count options include first, second, third, forth, and last. Day options include Monday through Sunday. For example, The first Tuesday of every 3 months.



Annually Options

- **Every # year(s)** Sets the annual recurrence interval. For example, Every 1 year(s).
- **On [month] [day #]** Sets the month and the day number in which the work oder will recur every set number of years. For example, Every 1 year on January 25.
- **On the [count] [day] of [month]** Sets the count of a selected day, and the month in which the work order will recur every set number of years. Count options include first, second, third, forth, and last. Day options include Monday through Sunday. Month options include January through December. For example, Every 1 year on the second Tuesday of January.

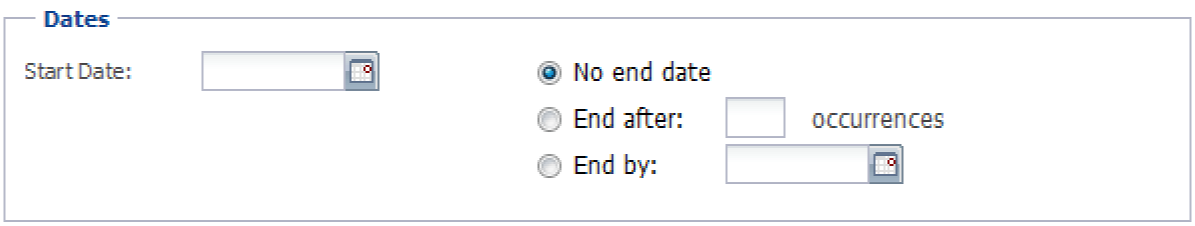


Dates

The Dates section of the Schedule tab is used to set the date that work order generation should begin and how long the work order generation should continue.

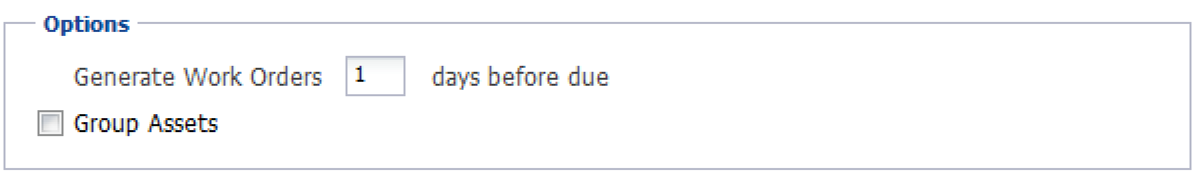
Note: *The work order scheduled date is entered as the Completion Due date on the work order.*

- **Start Date** Use to select the date that the first work order will be generated.
- **No end date** This option will continue work order generation indefinitely.
- **End after: # of occurrences** This option will generate work orders for a set number of occurrences. For example, End after 6 occurrences.
- **End by: date** This option will generate work orders up until a selected date. For example, end by 01/01/2020.



Work Order Options

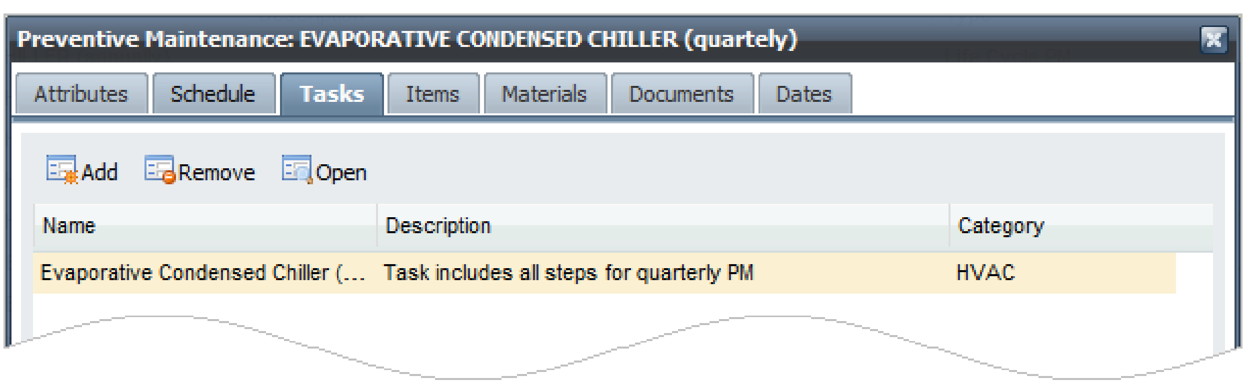
- **Generate Work Orders # days before due** Use this option to generate the preventive maintenance work order a set number of days before the work order's scheduled date.
- **Group Assets** - When selected, this option will group all items assigned to the preventive maintenance routine onto one work order. When not selected, a separate work order will be generated for each item assigned to the preventive maintenance routine.



Tasks Tab

The Tasks tab of the Preventive Maintenance form is used to assign Task records to the preventive maintenance routine. All assigned tasks will be included on the work order along with their associated Steps and Readings.

Figure 5—Items Tab, Preventive Maintenance Form



Add. Use to add a Task record(s) to the Task tab.

Remove. Use to remove a selected Task record(s) from the Task tab.

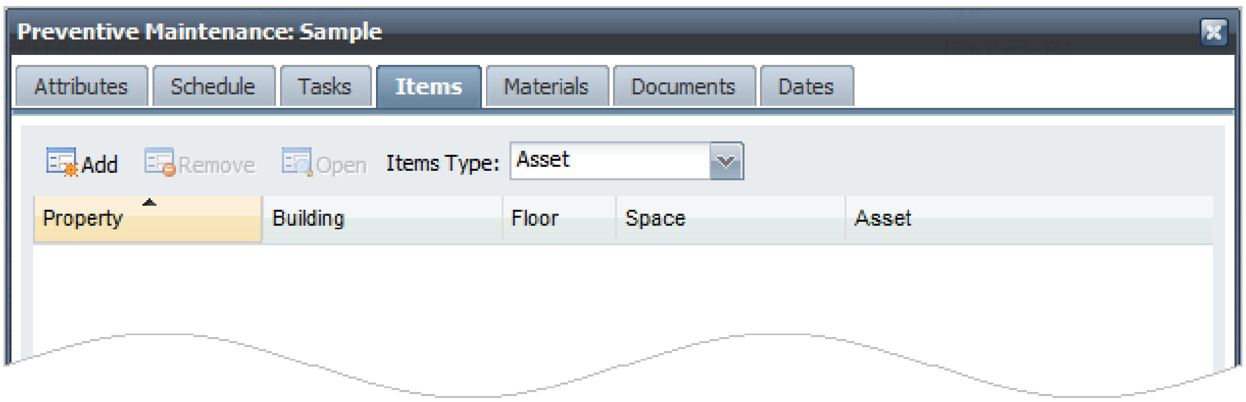
Open. Use to open the Task form and display a selected Task record and its associated Steps.

Items Tab

The Items tab of the Preventive Maintenance form is used to assign the assets or locations within your facility that require the work on a preventive maintenance routine.

Note: *A work order will be generated for each item included on the Items tab unless the Group check box located on the Schedule tab is selected.*

Figure 6—Items Tab, Preventive Maintenance Form



Item Type Pick List. Use to select the type of items to be added to the Items tab.

Item types include:

- Asset (default item)
- Property
- Building
- Floor
- Space

Note: *A preventive maintenance routine can contain multiple selections of the same item type, however only one item type per routine can be assigned. For example, you cannot have a routine that contains both Asset and Space items.*

Add. Use the Add button to add an item record(s) to the Items tab.

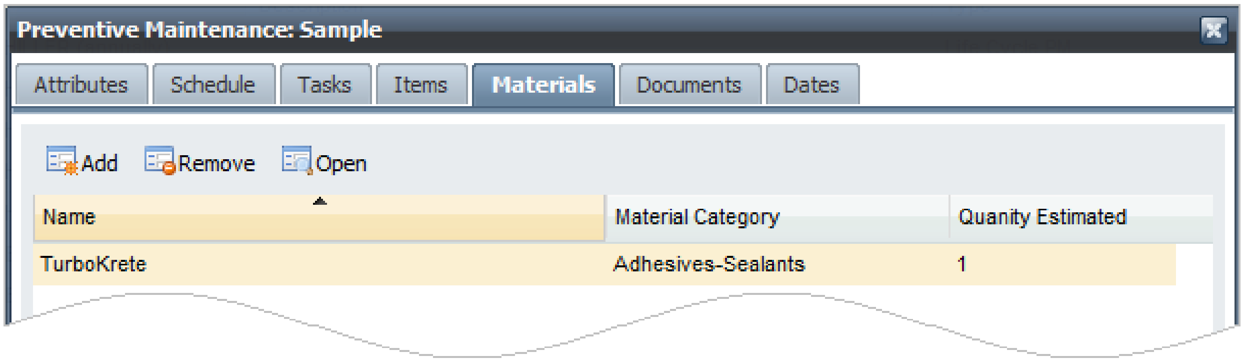
Remove. Use the Remove button to remove a selected item record(s) from the Item tab.

Open. Use the Open button to open and display a selected item record.

Materials Tab

The Materials tab of the Preventive Maintenance form is used to assign materials to a preventive maintenance routine. Materials added here will be included on all work orders generated from the preventive maintenance routine.

Figure 7—Materials Tab, Preventive Maintenance Form



Add. Use to add a material record(s) to the Materials tab.

Remove. Use to remove a selected material record(s) from the Materials tab.

Open. Use to open and display a selected materials record.

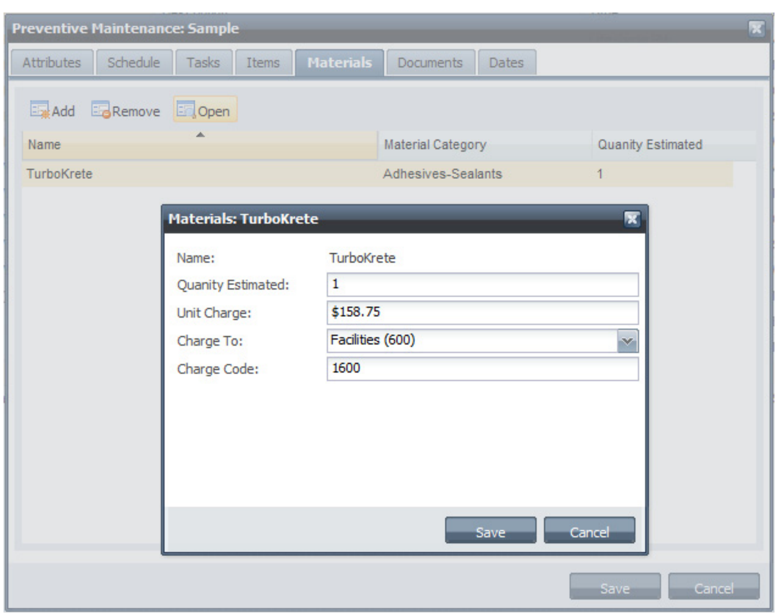
Work Order Materials Form

Use the Work Order Materials form to configure the estimated quantity, and charge data required for this specific preventive maintenance routine.

To display the Work Order Materials form:

1. On the Materials tab, select a material record in the list.
2. Click the Open button to display the Work Order Materials form.

Figure 8—.Work Order Materials Form opened from the Materials Tab of the Preventive Maintenance Form



Documents Tab

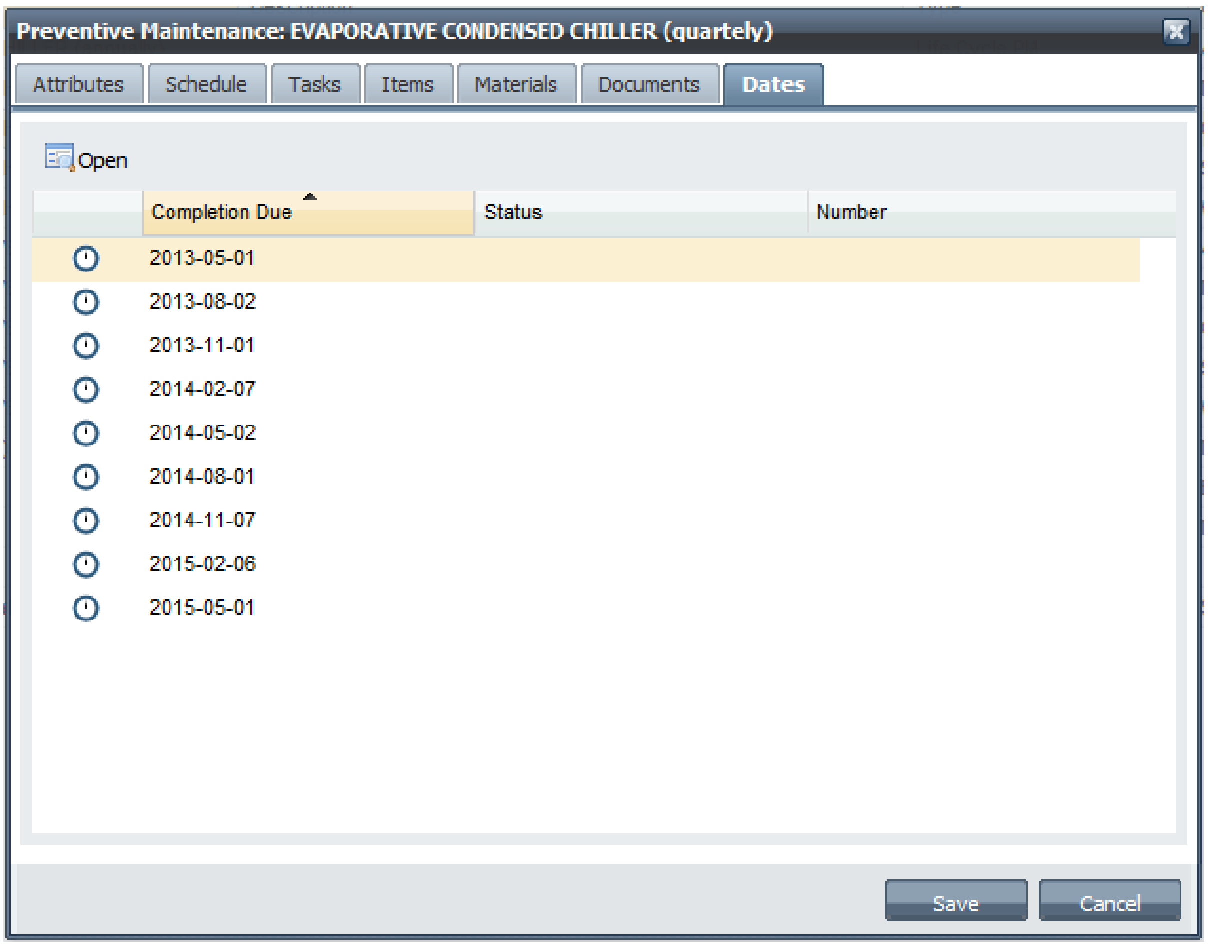
Use the Documents tab to add a document file(s) to the preventive maintenance record.

Note: *To utilize this tab, you must first load the document file(s) into EvolveFM using the Documents component.*

Dates Tab

The Dates tab displays a list of all work order generation dates scheduled for the preventive maintenance routine.

Figure 9—Dates Tab, Preventive Maintenance Form



Open. Use to open the.... to a selected date record.

Creating a Preventive Maintenance Routine

The Process

Create a new PM

1. Display the Preventive Maintenance grid.
2. On the Preventive Maintenance grid, click Add.
3. On the Preventive Maintenance form, in the Name text box enter the name of the preventive maintenance routine (required).
4. Utilize the remaining Attribute tab data fields as needed (optional).

Schedule the PM (required)

5. Click the Schedule tab on the Preventive Maintenance form.
6. In the Recurrence Pattern selection list, select a recurrence pattern (Daily, Weekly, Monthly, or Annually) to display its recurrence interval options.
7. Configure the selected Recurrence Pattern's interval options as needed.
8. In the Dates section of the form, select a Start Date for this preventive maintenance routine and then choose an End Date option.
9. In the Options section of the form, configure the work order generation options as needed.

Assign a task(s) to the PM (required)

10. Click the Task tab on the Preventive Maintenance form.
11. Click Add to display the Select Tasks form.
12. On the Select Tasks form, select one or more pre-configured tasks to assign to the preventive maintenance routine, and then click Save.

Assign an item(s) to the PM (required)

13. Click the Items tab on the Preventive Maintenance form.
14. In the Items Type pick list, select an item type for this preventive maintenance routine.
15. Click Add to display the Select Items form.
16. On the Select Items form, select one or more items to add to the preventive maintenance routine, and then click Save.

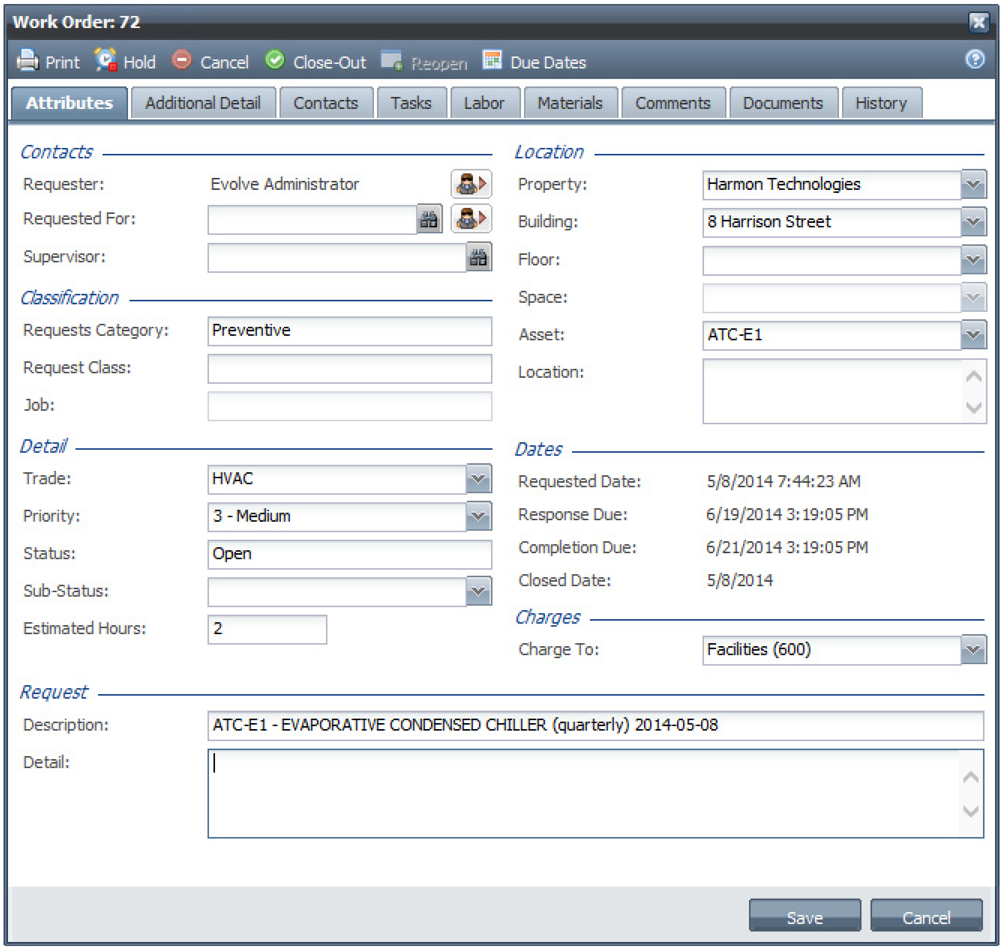
Assign Materials to the PM (optional)

17. Click the Materials tab on the Preventive Maintenance form.
18. Click Add to display the Select Materials form.
19. On the Select Materials form, select one or more materials to add to the preventive maintenance routine, and then click Save.
20. On the Materials tab, select and open each material record as needed to configure its estimated quantity and charge data fields.

Generating a PM Work Order

Preventive Maintenance work orders are automatically generated based on the settings set on the Schedule tab of their related Preventive Maintenance Routine. Once generated, the PM work order will appear in the Work Order grid with a status of either Open (if the Assign check box was not selected on the Attributes tab of the PM routine) or Assigned (if the Assign check box was selected on the Attributes tab of the PM routine).

Figure 10—Work Order Generated by a PM Routine



Requester. Because a PM work order is automatically generated by the Evolve application, the Requester will always be the Evolve Administrator.

Request Category. The Request Category is automatically populated with Preventive.

Description. A concatenation of the PM item, the PM Name, and the work order generation date is used to automatically populate the Description field.

Location. The Location is automatically populated based on the location of the item assigned to the PM routine.

Dates. Date fields are automatically populated based on the PM routine schedule.