Performo v10 User Reference Guide

Video [Performo v10 Video Learning Center]

Click the link to view the list of video tutorial topics in your default browser.

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Performo Overview

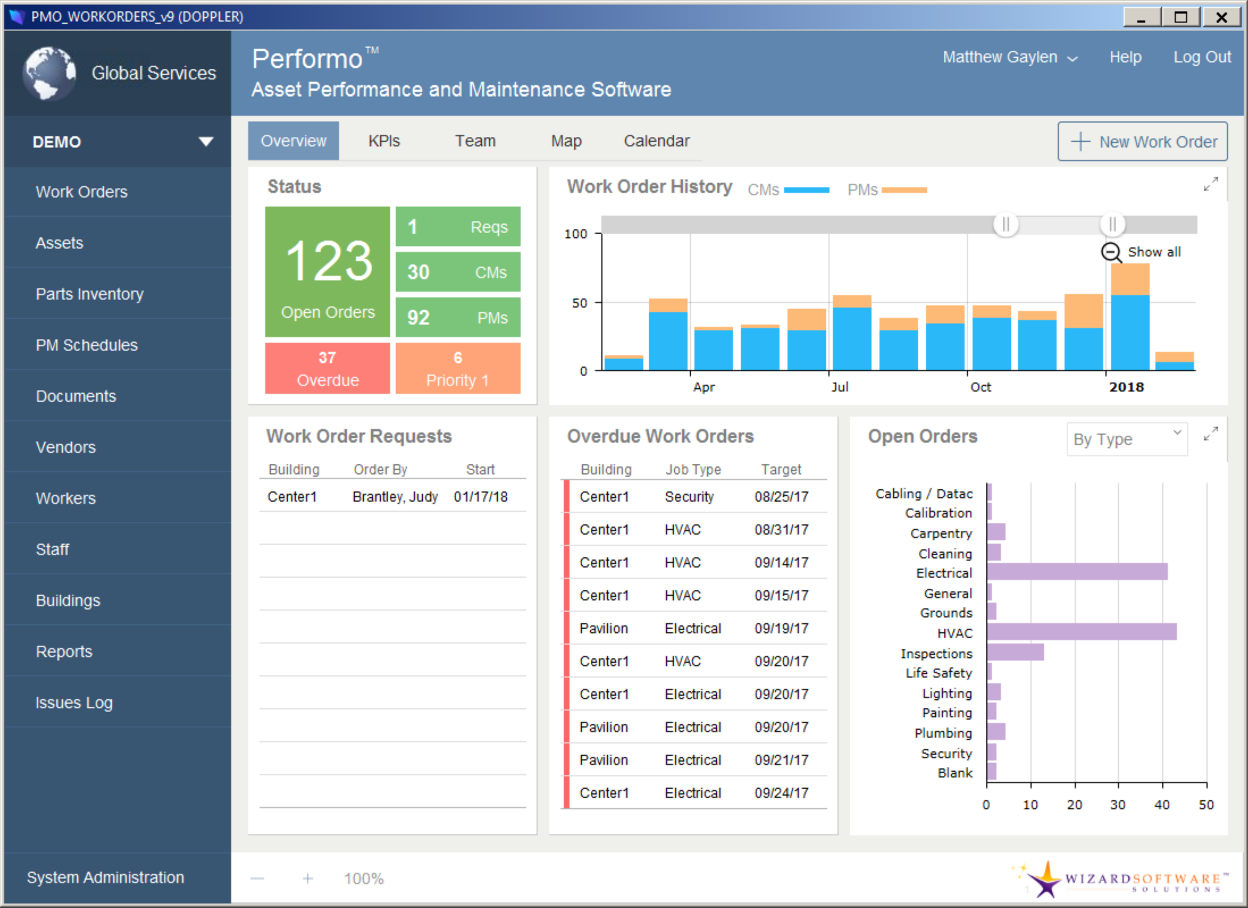

Figure 1 Performo™ Overview

Performo manages work orders, preventive maintenance, assets, inventory and other facility upkeep activities. Performo is deployed as a complete enterprise Computerized Maintenance Management System.

This user reference guide is designed to help users get their work done. There is an extensive List Of Figures and a subject by subject Table Of Contents. The goal is to direct users to subject-matter pages quickly, efficiently and simply. It is designed to show users how to interact with screen elements to accommodate their duties, tasks and responsibilities. Contact the Solution Admin first when there are questions or comments. The core strength of Wizard Software is our ability to resolve issues quickly, with straight-forward language. We are uncompromising in our devotion to simplifying complex problems.

All The Things

FILEMAKER

The database platform used to create Performo™.

SOLUTION ADMIN

The Solution Admin is the user who oversees the System Administration modules and is the initial point of contact for Performo™ users.

PROJECT IMPLEMENTATION TEAM

The people at the company, corporation or institution who work with the Project Management Team at Wizard Software Solutions to install, configure and roll out Performo.

PROJECT MANAGEMENT TEAM

The team at Wizard Software Solutions who work with the Project Implementation Team to install, configure and roll-out Performo. The Project Management Team includes the Project Manager, project engineers and support staff at Wizard Software Solutions.

IMPLEMENTATION SERVER

Implementation takes place on a server. FileMaker Server is installed and configured to provide client and web-based access to features, functions and data. The server can be located on internal network or the server can be hosted by Wizard Software. All the data lives on the server permanently. The server takes care of all daily backups. Seven days of backups are stored on the server. The IT department hosting the server takes care of archiving backups.

IMPLEMENTATION: CITRIX

Citrix is deployed in situations where Wizard Software is hosting the FileMaker Server. Citrix is a technology that allows users to access hosted solutions on a wide variety of devices. Citrix is accessible wherever there is an internet connection. The Citrix gateway is web-based. Finally, there are free desktop and device-specific applications.

DATABASE

A computer software application that aggregates information. Performo™ is a database focused on tracking and managing work orders, service requests, and preventive maintenance schedules.

RECORD/ROW

A record is one horizontal line in a list view. For example, each work order is its own record in the Work Order table. Work order records can be arranged in rows or spread out on screen to display details about one order at a time.

VALUE LIST

Throughout Performo, users can enter data by using a value list that drops down or pops-up. There are different kinds of value lists, and the items comprising a value list can be aggregated in several different ways.

LIST VIEW

List view is a high-level overview. Each row is one record. Each column is one piece of data about that item.

FIELD/COLUMN

A field displays data. Sometimes people say, “I’m inputting data.” What they mean is, “I’m inputting data in fields.” A field is similar to a cell in a spreadsheet. Each field displays one piece of information about an item. In list view, each column is one field. In detail view, fields are arranged for data display and data entry. Fields can be designated for a specific type of data such as dates, dollars, or text. Data can be restricted to options selected from a value list. Additionally, fields can also store and display summary or calculated values, images or files of almost any type.

For example, a PDF in a container field allows users to interact with the content of the document.

DETAIL VIEW

Detail view displays information about an item. In many cases, data is accessible via tabs that navigate to more detail on additional screens. Click the tab to view the data under that heading.

TABLE

A table displays columns of fields arranged in rows of records. Data for work orders, assets, parts and inventory, and preventive maintenance schedules is stored in tables.

To be clear, the table is the data source.

This is very important when creating custom reports where it is necessary to choose the table that has the required data. Tables, where data is stored are also referred to as, modules.

The Work Orders module stores all the work order data in the Work Orders table. The Assets modules stores all asset information in the Assets table. When tables are related, assets can be attached to work orders.

FILTER

A *filter* is used to separate substances. In Performo, *filters* are used to separate records for display and reporting purposes. Every list view includes a **FILTER** button. Click the **FILTER** button to display the Filter window. When values are entered into the Filter window, Performo automatically displays matching records. In list view, these records can then be sorted by clicking any column heading and then printed using the Actions menu.

UNDER THE HOOD

Under the hood is a term used to describe development, programming or customization that adds, modifies or customizes features or functions in Performo. Depending on the situation, project engineering work *under the hood* will require a proposal for professional services.

FINDING

Searching for a specific record or a set of records. Synonym: Query.

FOUND SET

The records on display are referred to as the found set. The found set is always the result of a find operation – a *find operation* creates a *found set*. The find operation can be executed manually by a user or automatically via script. Scripts with find steps can be run manually or can be executed automatically. When a found set is sorted and printed; the result is often referred to as a *report*. Details about how to Find, Sort and Report are covered throughout this guide.

SUB SUMMARIES

In list view, and on reports, a sub summary is used to display data in groups under a heading. For example, in the Work Orders module, click the Job Type column heading and Performo displays the list of work orders sub summarized by Job Type. Above each section of work orders, a one-line heading displays the name of the job type and the number of orders in that group. Where appropriate, a sub-summary that aggregates units such as dollars may also appear at the bottom of each group.

ENTITY

Performo™ can use the term **ENTITY, PROPERTY, AGENCY, CAMPUS, DIVISION, BRANCH, UNIT, DEPARTMENT, BUREAU…**

…or any other term to label corporate elements that are physically, geographically or financially separate.

Performo keeps records in entities distinct from each other. However, an **ALL** entity can be used to aggregate and report about all entities. The name of the All entity is user-definable. It does not have to be called, *All*.

The ALL entity is **not** used for data entry. Most likely, the All entity is used for reporting purposes only.

The Solution Admin will work with the Wizard Software implementation team to choose the entity label that reflects how the company, corporation or institution does business.

Although the entity selection is user-definable; once a selection is made, there is usually no need to further revisit the issue or change the setting.

SAVING DATA

Data is saved on the server immediately and automatically. Single click anywhere on screen. Performo automatically saves the data entered most recently. This includes going to another field. To clarify, going from field A to field B automatically saves the data entered in Field A. The Control + S keyboard shortcut opens the *Sort* dialog box. Sorting by dialog box is for advanced users only; so there is generally no reason to use the Control + S keyboard shortcut in Performo.

HELP MOVIES

Video tutorials are available via the Help button on every screen. The content list is constantly evolving. Contact the Solution Admin with ideas for topics that would be helpful.

ENTERING DATES

Date fields will always drop down a calendar. Tap or click to choose a date. Tap or click a second time to put the cursor into the field to enter a date manually or to edit an existing date. Furthermore, the solution includes a time-saving feature. There is no need to enter any digits for the year when entering dates in the current year. 1/1 will enter the value 1/1/<current year> in any date field.

PORTAL

Performo™ records, stores and displays data. The information is stored in separate tables that are related to each other. Thus, FileMaker is a *relational* database; information from one table can interact with data from another table. *What it looks like*; a portal is placed on a layout to display items from another module. For example: Assets are stored in the Assets module. However, Assets can be displayed on work orders in the Work Orders module. It is not necessary to understand anything about portals. However, in this guide the term *portal* will refer to a special area on screen where the data displayed is from another module. A portal is visually identifiable by the alternating light and dark rows.

PRESERVE THE FOUND SET

In detail view, **CONTROL+CLICK** the Navigation menu on the Title bar to return to the same found set in list view. How it looks; starting from the Main Menu or the Navigation Menu go to a list view for any module. Performo displays the standard found set. Filters can be applied in list view to display a different or more specific found set. Click on any row to view details about that item. Once in Detail view, **CONTROL+CLICK** the Navigation menu on the Title bar to return to the same found set in list view.

DISCLAIMER

Wizard Software products will substantially conform to this Documentation. Please discuss variations with the Solution Admin.

CONFIDENTIALITY

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List View Basics

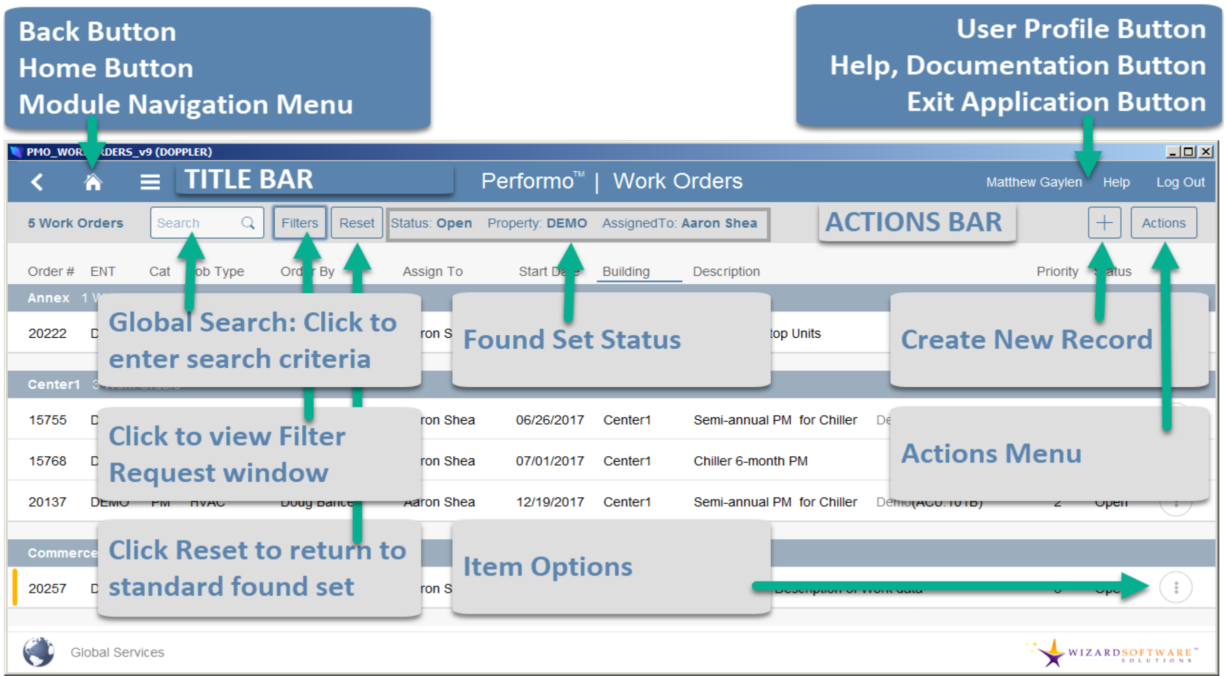


Figure 2 Performo Orientation

List view provides a high-level overview of the found set. *Found Set* is term used to describe the items displayed on screen. The found set can be all the items, or a smaller subset. Every module begins with a list view.

Navigating from list view to detail view does not change the found set. Navigating from detail view back to list view does not change the found set. The found set remains constant until the user navigates back to the Home Screen.

The Title bar displays the **BACK** button, the **HOME SCREEN** button, and the **NAVIGATION MENU** button as well as the Title of the screen. The screen title can also be thought of as the context for the data displayed. The right side of the title bar displays the **USER PROFILE** button, the **HELP & DOCUMENTATION** button and the **LOG OUT** button.

The Actions bar displays the number of items in the found set, the Global Search field, the Filters button, the Reset button if the found set has been customized, and the found set criteria. The right side of the Actions bar displays the **ADD NEW RECORD** button, and the **ACTIONS MENU** button.

The Record menu is on the right side of every row. The Record menu is context sensitive and the value list includes options such as Duplicate, Delete, Print, Constrain by, Omit.

LIST VIEW ORIENTATION

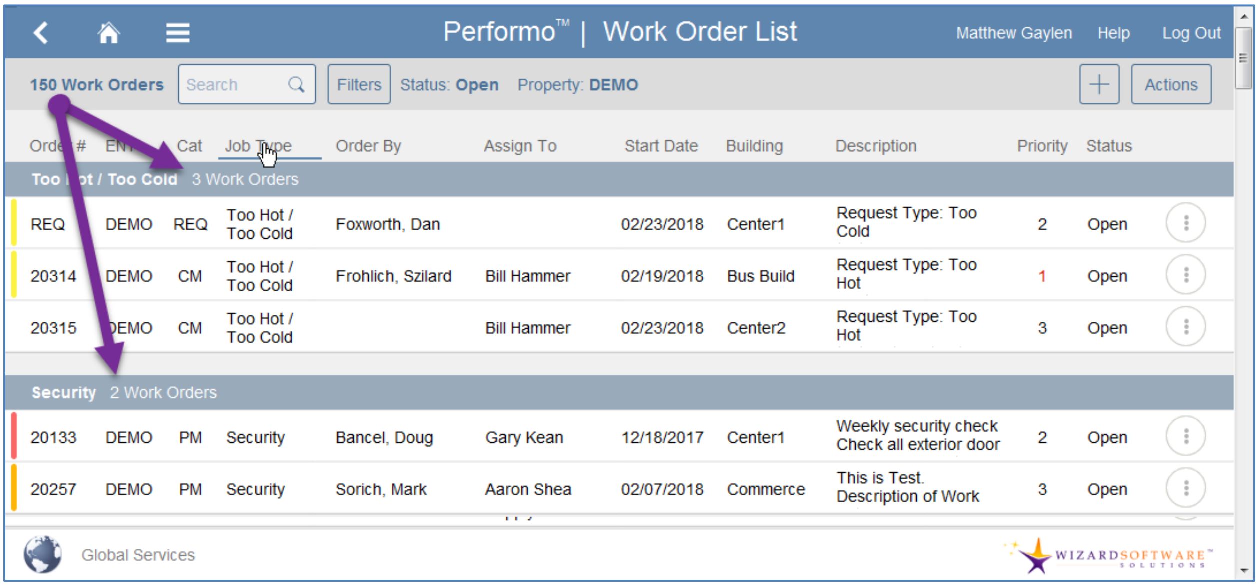


Figure 3 List View - Sub-Sorted By Column Heading

SORT BY COLUMN HEADING

Click any column heading to sort the found set by that value. Where it makes sense, Performo will automatically sort the list by that value and display how many of that item are in that category. Figure 3 – of the 150 work orders in the found set, 3 are Too Hot / Too Cold job type. Two are Security job type. Scroll down to view remaining job type summaries.

FOUND SET STATUS

The area to the right of the **FILTERS** button on the Actions bar tells users about the status of the Found Set: Open items from the Demo property in Figure 3 .

If the **RESET** button is not visible, that means Performo is displaying the standard found set for the module.

Figure 4 Title Bar

TITLE BAR

The Title Bar is at the top of every screen in Performo. From left to right, the **BACK** button, the **HOME SCREEN** button, and the **NAVIGATION MENU** button each provide users with quickly accessible direction-finding options. The name of the screen appears in the middle and provides the context for the found set. On the right are the user name, the **HELP** button, and the **LOG OUT** button.

Users should get in the habit of using the **LOG OUT** button rather than the **WINDOWS CLOSE** box. It is always a good idea to use the navigation buttons within the solution rather than the **WINDOWS CLOSE** box. For example, if a user is finished on one screen and clicks the **WINDOWS CLOSE** button, Performo will completely exit. If the user is finished on any screen, the preferable navigation option is to use one of the on-screen buttons to go to another module or back to the Home screen. In this way, the application remains open.

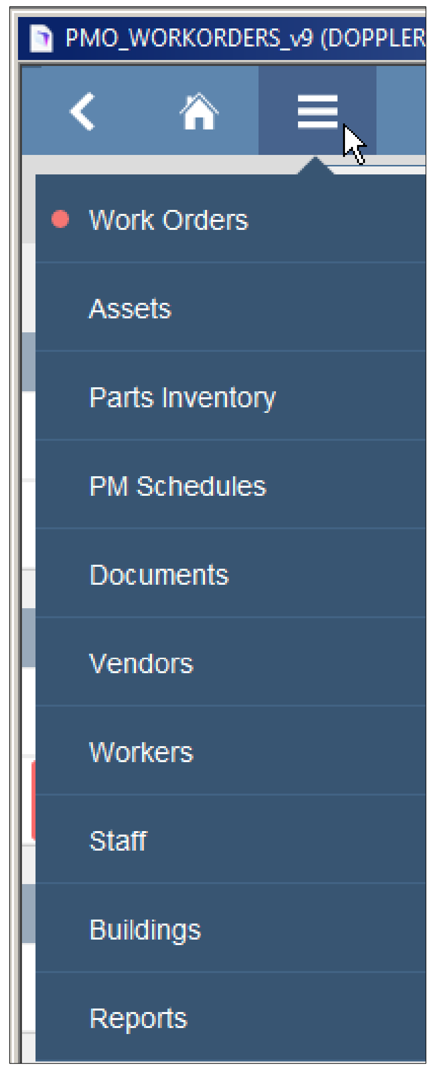


Figure 5 Navigation Menu button

Click the **BACK** button to return to the previous screen. Note the **BACK** button terminates at the Home Screen. There's no going back beyond the starting point – only forward again. Use the navigation buttons on the Main Menu of the Home Screen to navigate to any of Performo's modules.

Click the **NAVIGATION MENU** button. Performo displays the list of modules. The Parts Inventory module contains three subdivisions: Parts Inventory, Purchase Requisitions, and Transactions. One in the Parts Inventory module, users can navigate to any of the parts subdivisions using the **NAVIGATION MENU** button.

Click the **HOME SCREEN** button. Performo displays the Home screen.

THE ACTIONS BAR

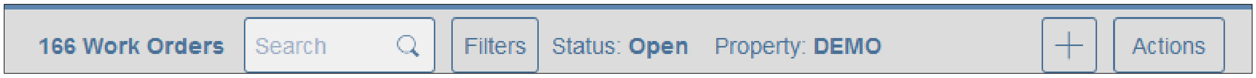


Figure 6 The Actions Bar

The Actions bar appears below the Title bar. From left to right, the:

1. Number of items in the found set,
2. Global search field,
3. FILTERS button,
4. RESET button appears if filters have been applied,
    a. The RESET button is hidden when Performo displays the standard found set;
5. List of filters having been applied; aka breadcrumbs…
6. ADD NEW RECORD button appears in the shape of a plus + symbol and
7. ACTIONS MENU button.

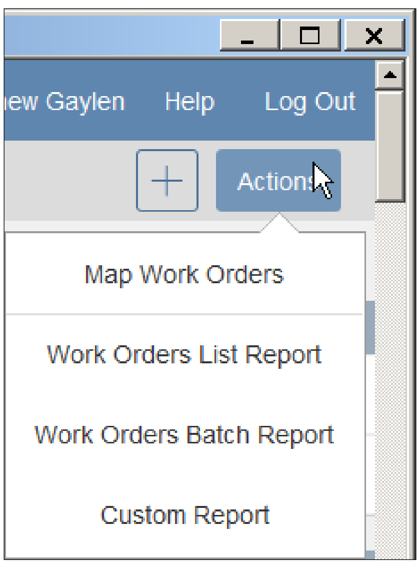


Figure 7 Context Sensitive Actions Menu

THE ACTIONS MENU

After finding a group of records to examine, analyze or report about, click the ACTIONS MENU button and choose the List Report option. Performo will automatically display the found set sorted and summarized the way it appears on screen in a format suitable for saving as PDF or printing.

THE RECORD MENU OPTIONS MENU

The **RECORD MENU OPTIONS** button displays a list of choices for that record. Options often include Duplicate, Delete, Print, Omit, and Constrain By.

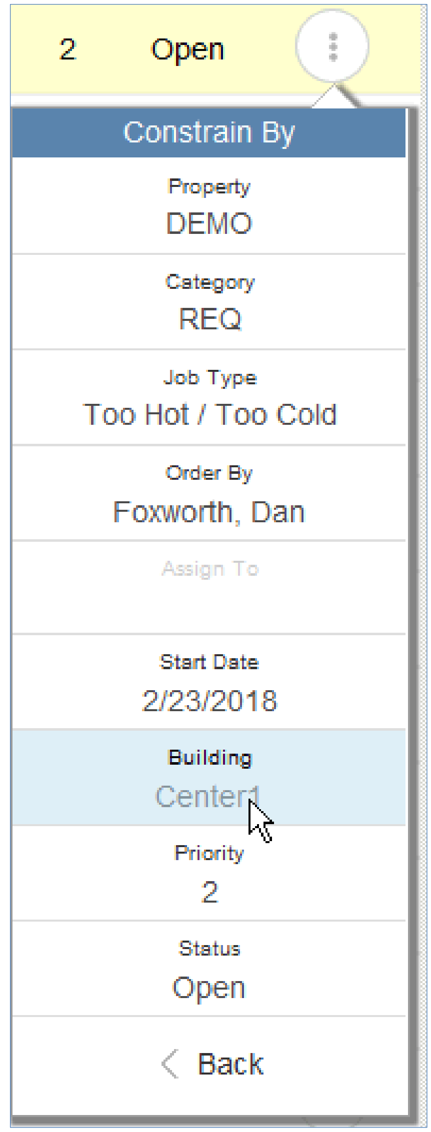


Figure 8 Constrain By (Record Options)

CONSTRAIN BY

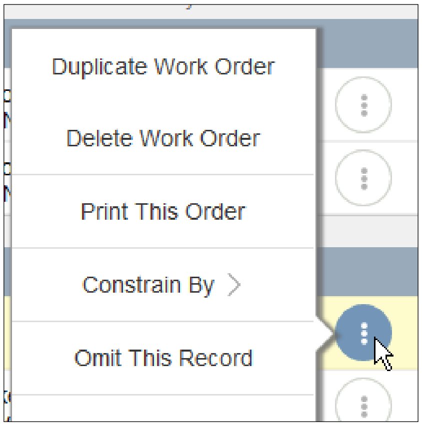


Figure 9 Record Options Menu button

The Constrain By option in the Record Menu value list allows users to quickly create a found set starting with records in the current found set.

For example, Figure 8 shows how to refine the found set of all open work orders to only the open work orders in Center1. The found set of open work orders could be narrowed down to just the open orders that are REQ, or are Job Type Too Hot/Too Cold, or ordered by Dan Foxworth, or started on 2/23/2018, or are priority 2. The Constrain By choice on the Record Options menu is context sensitive. Options will depend on the data in the record.

Depending on the option chosen, the found set will be significantly smaller. For example, the found set described in Figure 8, 150 work orders were reduced by more than a third to the 97 in Center1.

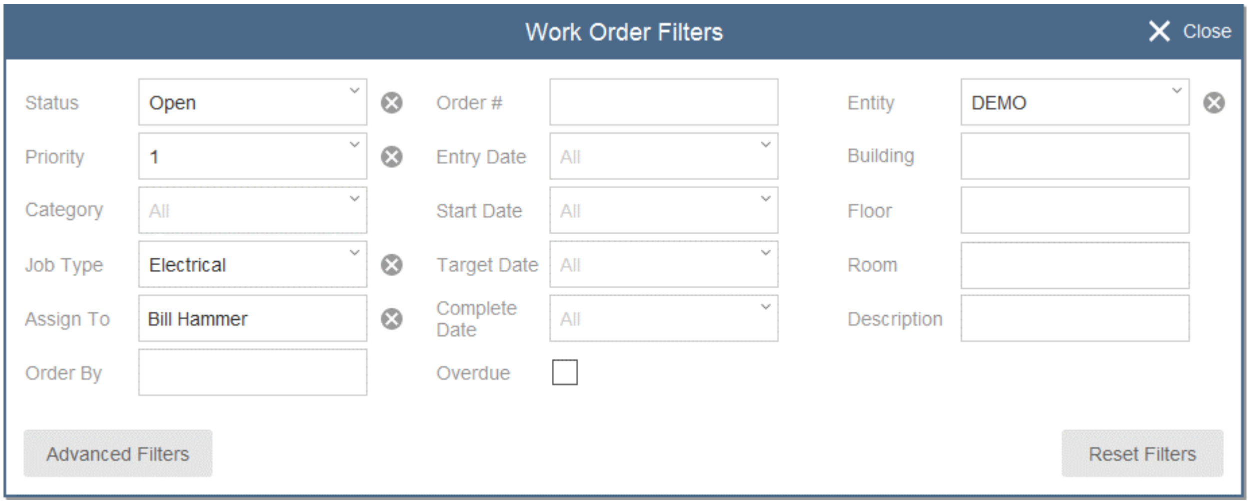


Figure 10 Find Filters

THE FILTER BUTTON

Click the **FILTERS** button to view the fields that can be used to create a Found Set. *How it works*: enter a value into any of the fields on the filter window. Behind the Filters window, Performo immediately finds and displays all the records that have a matching value in that field. Choosing *Bill Hammer* in the Assign To field on the find filter tells Performo to display Bill Hammer's work orders.

The filters work in conjunction with each other. Click the Job Type field and choose *Electrical*. Performo automatically finds and displays all Bill Hammer's electrical work orders.

Enter search criteria into as many filter fields as necessary to create the exact found set that is needed.

Click the **CLOSE** button to view results.

Click the **RESET** button on the filter window to revert to the standard found set. The filter window works the exact same way on all list view screens in all modules.

DROP DOWN VALUE LISTS

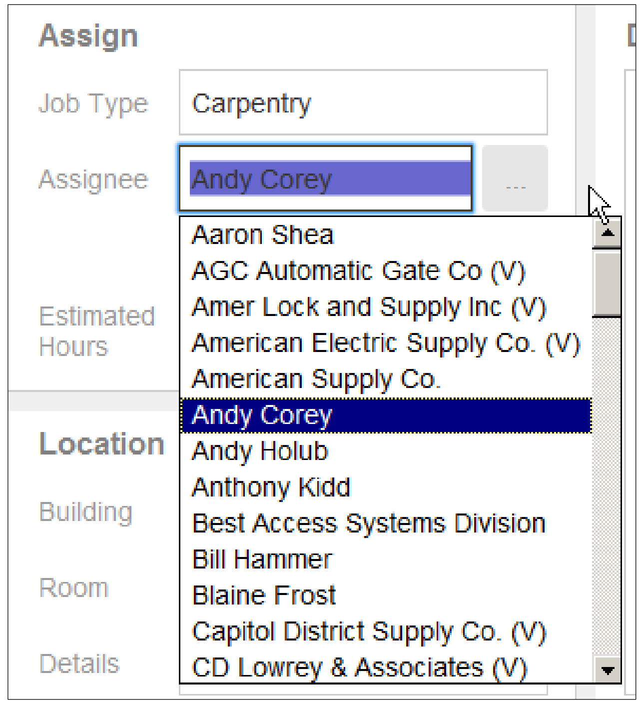


Figure 11 Drop Down Value List

The drop-down value list is a tool for maintaining data integrity during data entry. Filtering, finding and managing information depends on the data being accurate.

For example: if users have to manually type in the assignee's name, then over time, work orders might be assigned to Aaron Shea, Erin Shea, and Aron Shay. If there is only one Aaron Shea, then the reports about his work orders will be incomplete because a search for Aaron Shea will not find work orders assigned to Erin, Aron, or Shay. If everybody has to pick the name from a value list, no mistakes can occur in the spelling of the assignee's name.

Value lists are used throughout Performo to ensure data integrity.

How it works: Click once to display the values in the list. Navigate through the list with a pointing device or by using type-ahead. Type-ahead allows the use of the keyboard to navigate through the list. When Type-ahead is active; Performo automatically moves through the list as letters and numbers are entered. Type-ahead provides a way to quickly select items in lists that might be too long to scroll through.

Value lists can also be used in conjunction with each other. A value from one list, can be used to determine the values displayed in a second value list. Please contact the Solution Admin if it becomes necessary to change or reconfigure a value list.

VALUE LIST OPTIONS

Sometimes a field requires a selection from a value list. In some cases, there will be additional options such as Edit… and, or Other…

ENTER A UNIQUE VALUE WHEN A VALUE LIST IS PRESENTED

In some cases, a value can be chosen from the list or any other unique value can be manually added. Click once to view the value list. Click a second time to put the cursor in the field. Begin entering a new value or edit the existing value. In some cases, values added in this way are added to the main value list… in some cases they are not.

VALUE-LIST OPTIONS

Figure 12 shows a Pop-Up menu with the **OTHER…** and **EDIT…** options.

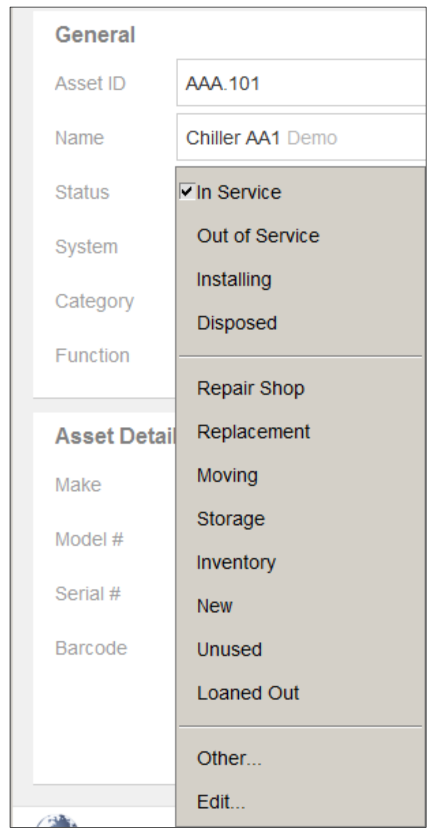


Figure 12 Pop-up Menu

POP-UP MENUS

The Pop-Up menu is the same as a drop-down value list, except a pointing device must be used to choose the correct option.

OTHER…

Click once on the field. Performo displays the value list. Chose Other… Performo displays the Other… dialog box. Highlight the text, *Enter any value…* and then begin typing. The value stays with the record until it is manually changed. In most cases, the other entry will not be saved on the value list. Other users who want to use this value will be required to retype it manually. The Other… option is for one-time, single-use entries not found on the value list.

EDIT… & OTHER…

The **EDIT…** option allows users to change the values in the list. The edited value list is visible for all solution users from that point forward.

Note that the changes do not affect any records having been previously created. Contact the Solution Admin if a large number of previously created records need to be amended, edited or replaced.

Consult the Solution Admin prior to choosing the **EDIT…** option in a value list.

Note that within the Edit… dialog box, a hyphen on a line by itself creates a separator line between sections of values.

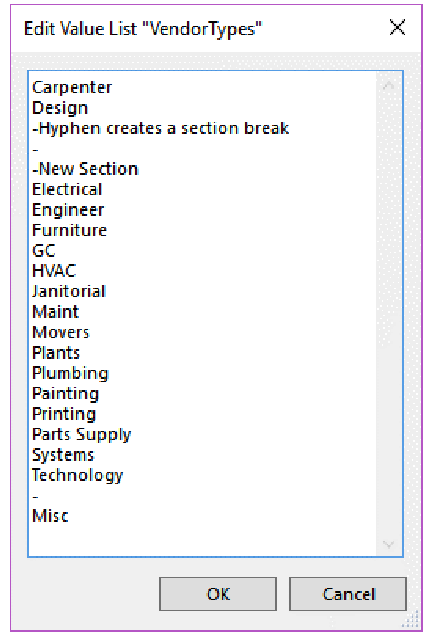


Figure 13 Edit… - Affects all users

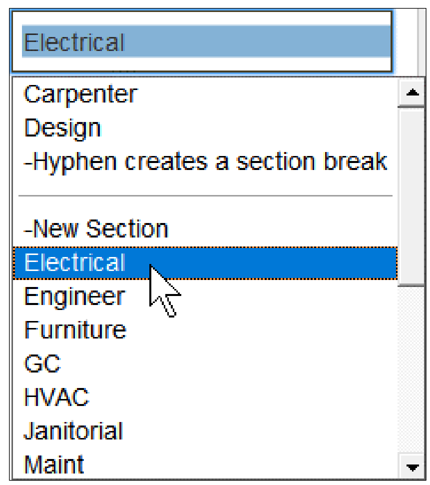


Figure 14 Value List w/section separator

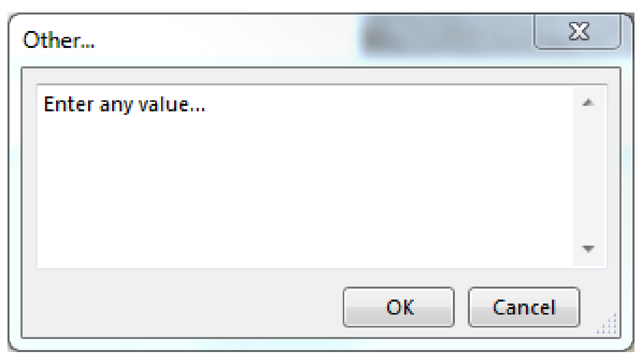


Figure 15 A Unique Value… Option II

Finding Records

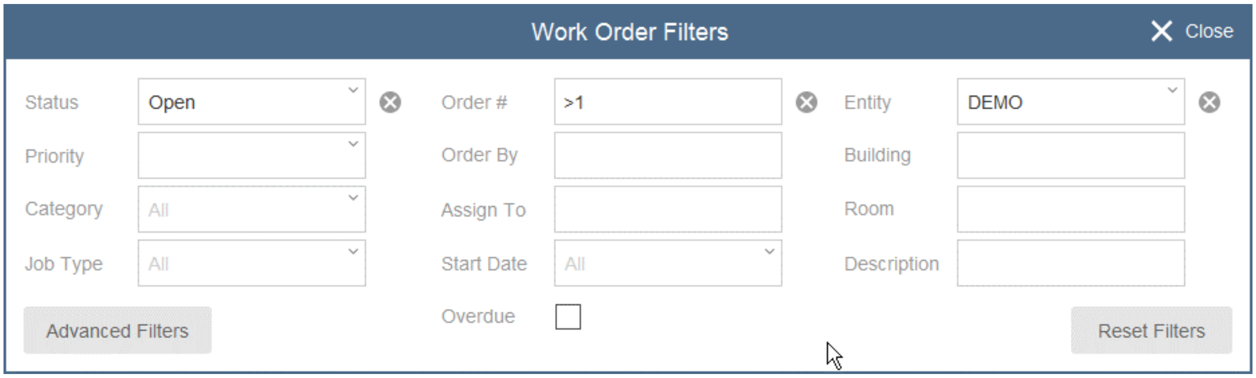


Figure 16 Filter Window

The Found Set is the group of records currently being displayed by Performo. The Found Set may be all the records in the module or a smaller collection of them. The Found Set may be sorted or unsorted. Finding records quickly and efficiently is a very important skill for Performo users.

Click the **FILTER** button on any list view. Performo automatically displays the Filter window. As values are entered, Performo automatically displays records with matching values in those fields.

Click the **RESET FILTERS** button to start over.

Click the **CLOSE** button to return to list view. The Close button does not reset filters.

Click the **ADVANCED FILTERS** button to view additional options. Advanced Filters are for skilled, experienced and mathematically-inclined users. Advanced Filters allow users to enter very specific query criteria.

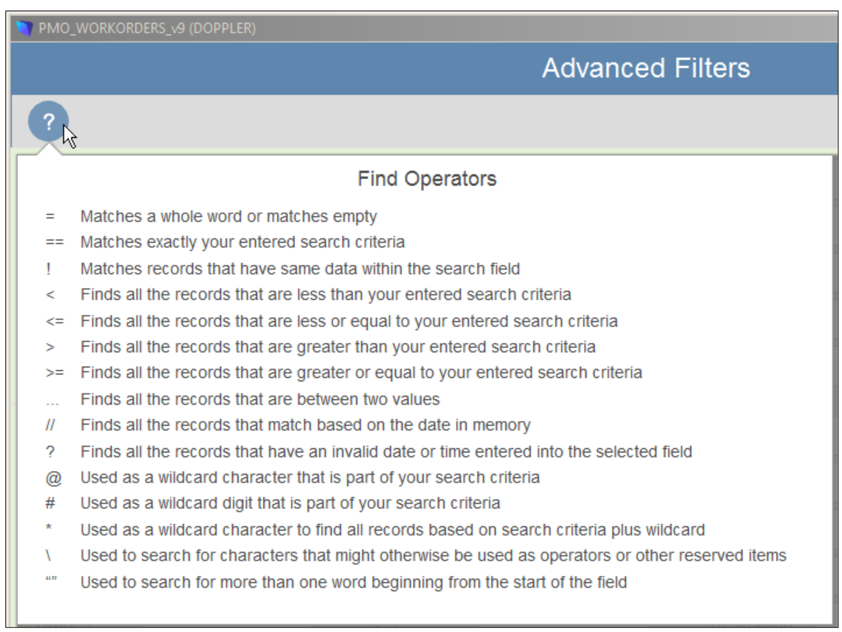


Figure 17 Advanced Find - Find Operators

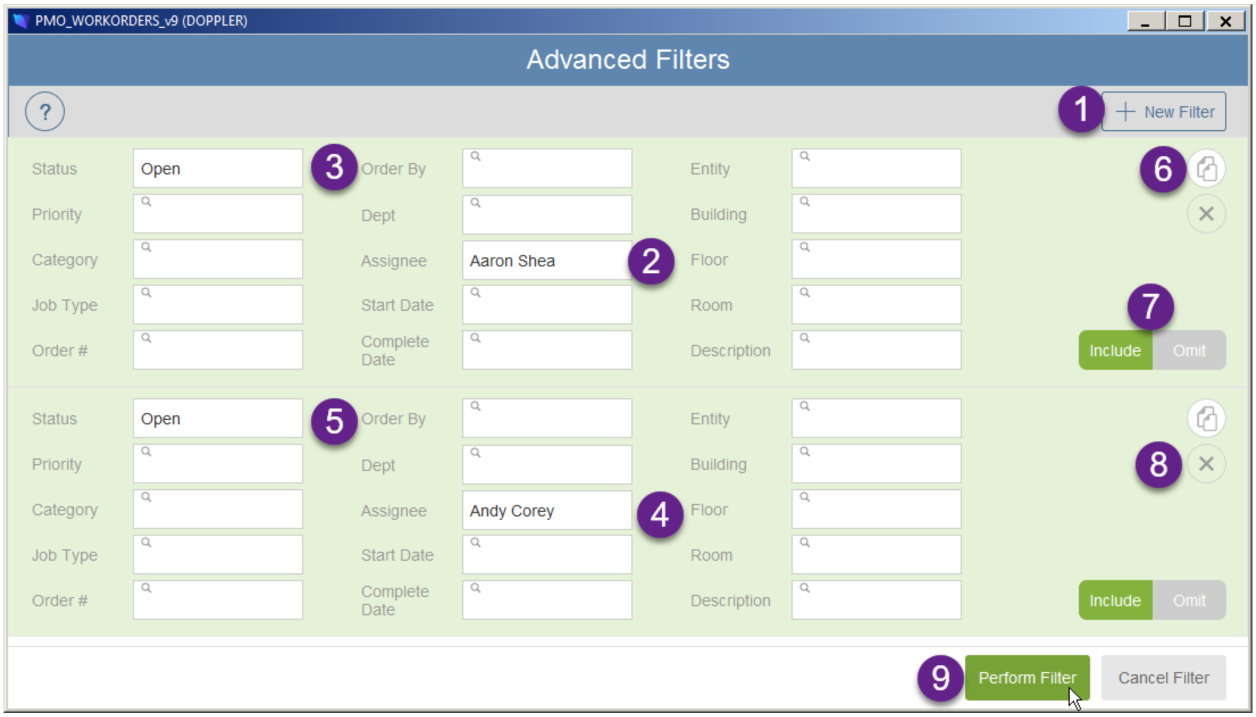


Figure 19 Advanced Filters window

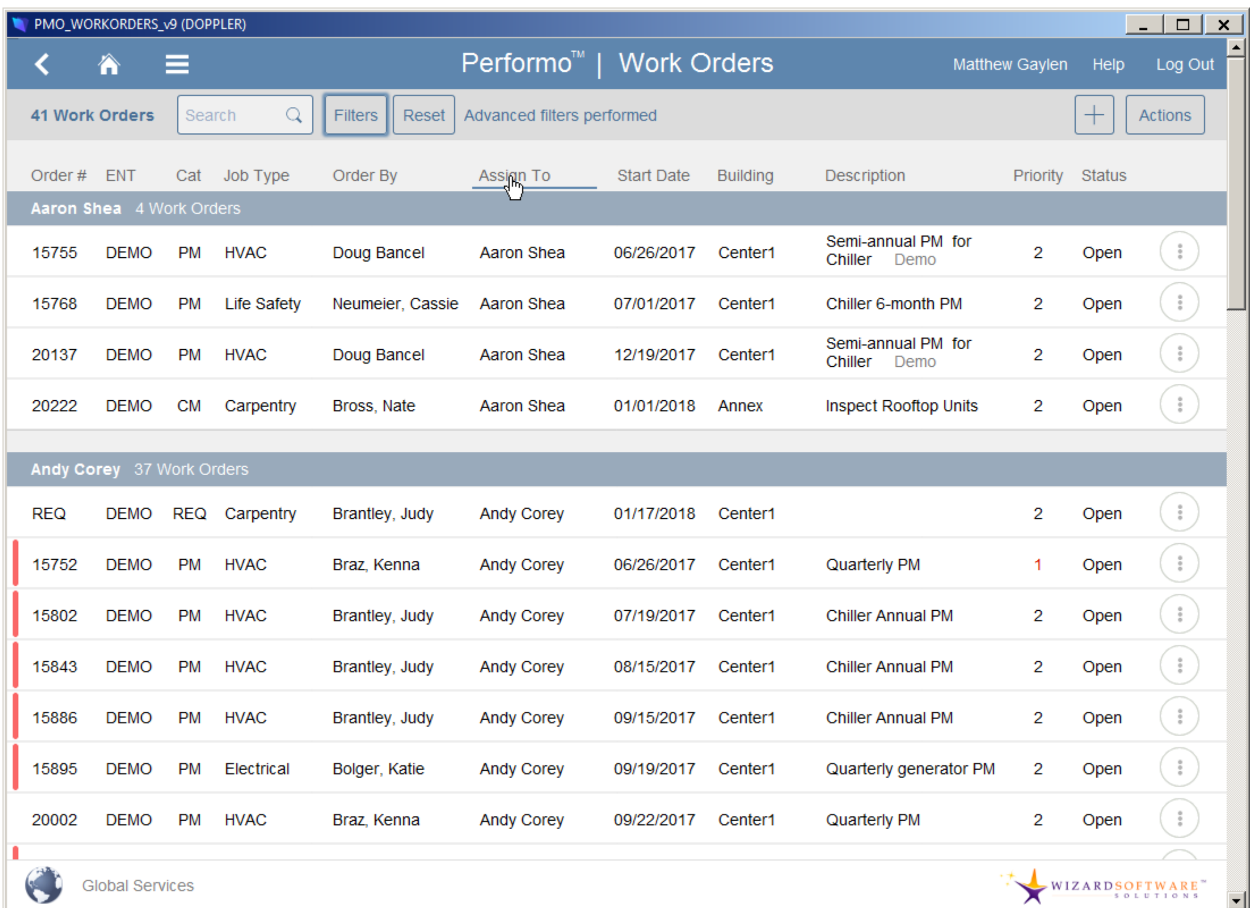


Figure 18 Filter Results - Aaron Shea's and Andy Corey's Open Work Orders

MULTIPLE REQUEST FINDS

Find Aaron Shea's or Andy Corey's open work orders. This is a demonstration of how to find the group of work orders assigned to Aaron. And also, the group of work orders assigned to Andy. Note that none of these work orders is assigned to both Aaron and Andy. Click the **FILTERS** button on list view. Click the **ADVANCED FILTER** button. Performo displays the Advanced Filters window - Figure 19.

1) Click the **+ NEW FILTER** to add another filter record.
2) Enter *Aaron Shea* in the first filter record.
3) Choose *Open* in the Status Field.
4) Choose *Andy Corey* in the Assignee field in the second filter record.
5) Choose *Open* in the Status field of the second filter record.
6) optionally, if the second filter request is similar to the first filter request, click the **DUPLICATE** button. Performo creates a matching filter. Next, manually edit the fields in the duplicated filter that need to be changed to find the records needed.
7) Click the **INCLUDE** button to find and display matching records.
   Click the **OMIT** button to exclude matching records from the found set.
8) Click the **X** button to delete the filter request.
9) Click the **PERFORM FILTER** button to view results - Figure 18.

MULTIPLE CRITERIA FINDS

Find Bill Hammer's Electrical work orders.

Use one filter request. Choose *Bill Hammer* from the Assign To value list in the Filter window. Then, choose *Electrical* from the Job Type value list on the same Filter request. Performo will automatically display the found set of Bill Hammer's electrical work orders.

FIND A RANGE

Show all the records from 2011?
[1/1/11…12/31/11].
Enter the beginning date. Enter two or three periods. Enter the end date. Performo will find and display all the items that occur between the two dates entered.

CONTROL + CLICK NAVIGATION BUTTON IN DETAIL VIEW

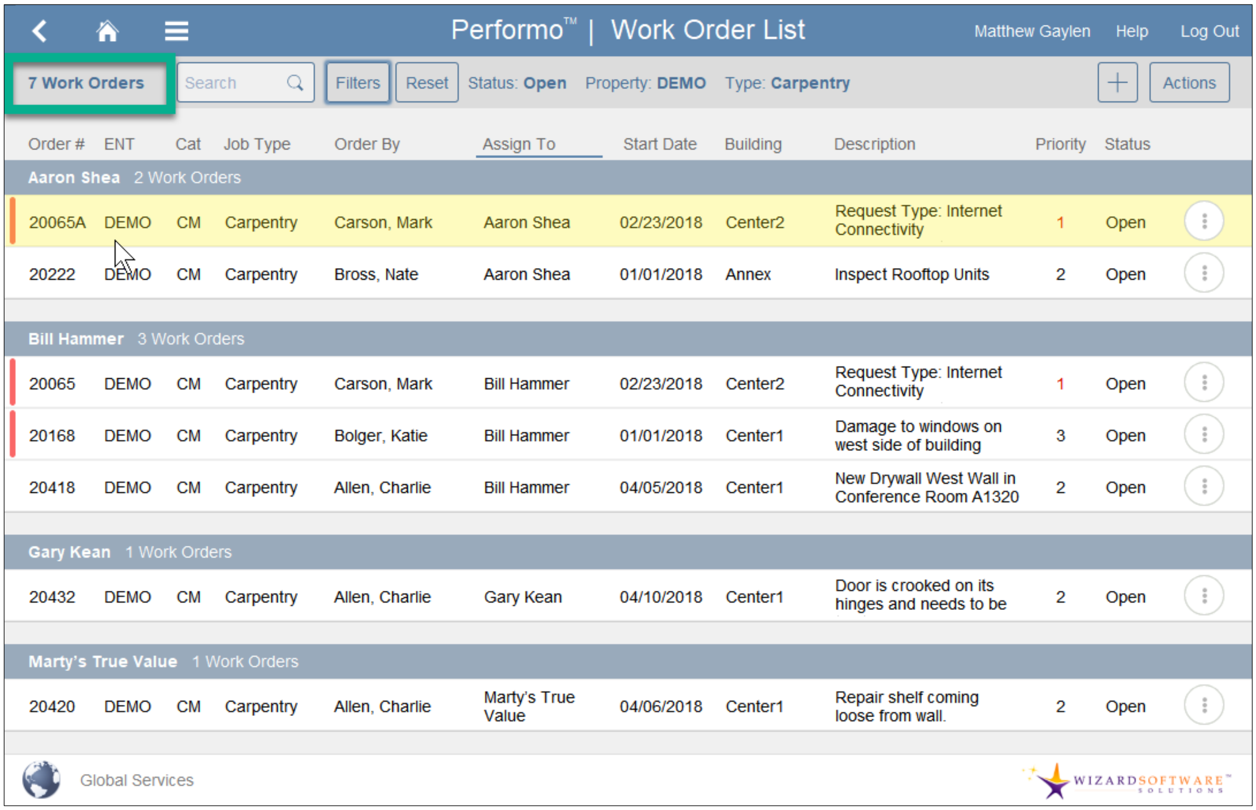


Figure 20 Found Set of Carpentry Word Orders sorted by Assign To…

Control+click the navigation menu in detail view to view the found set in list view.

Figure 20 displays a found set of carpentry work orders sorted by whom they are assigned to. The number of items in the found set (7) is displayed in the Actions bar.
Click on any record to view details about that record.

In detail view, the number of items in the found set continues to be displayed in the Actions bar. Click the arrows to view the first, previous, next or last record in the found set.

To return to the same found set in list view, hold down the control key and click the Navigation menu. Control+click the navigation menu in detail view to view the found set in list view.

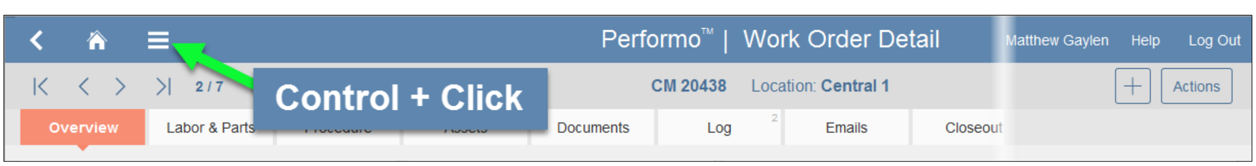


Figure 21 Control+Click Navigation Menu on Work Order Detail View to Navigate to Found Set in List View

Home Screen

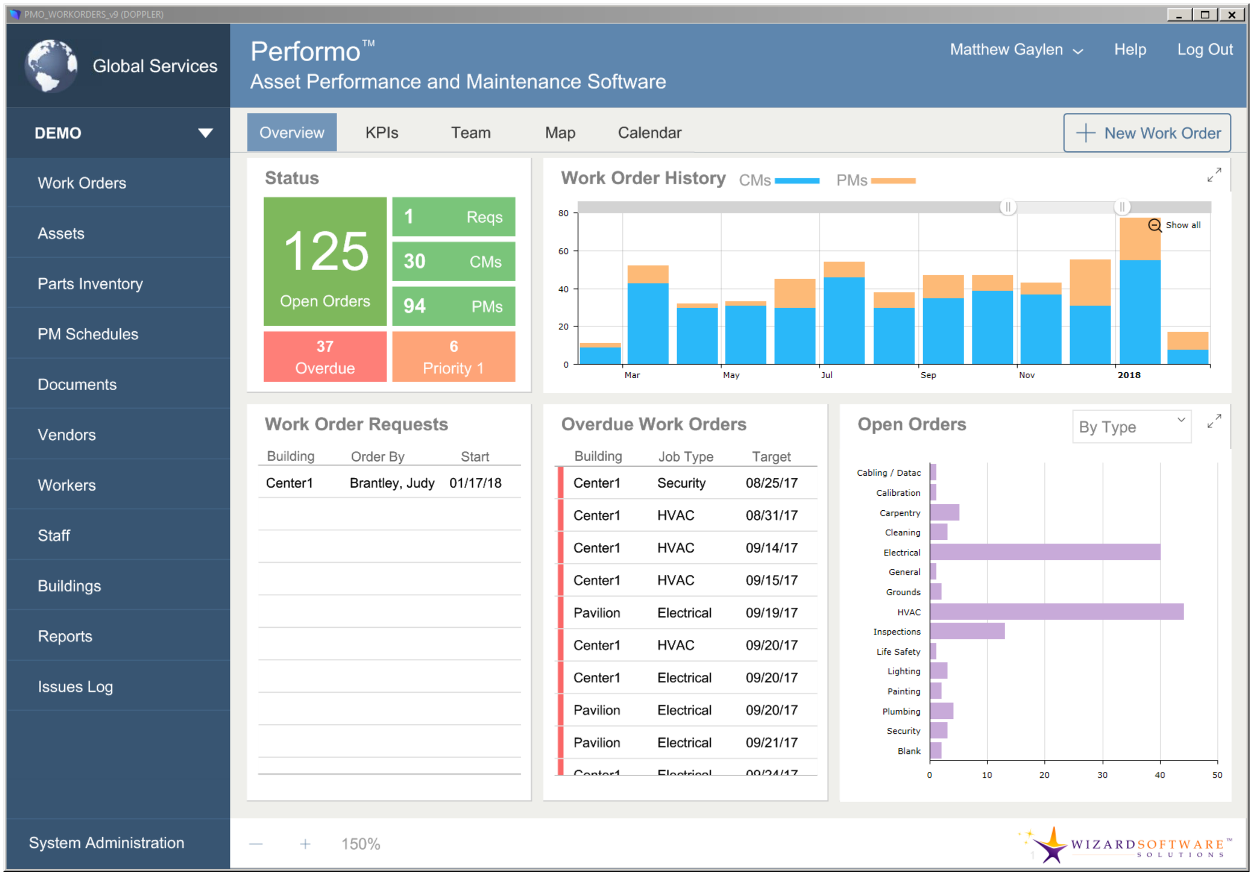


Figure 22 Performo™ Home Screen

Upon log in, Performo displays the Home Screen. On the Home Screen, the Main Menu is on the left. Click the buttons under the Main Menu to navigate to Performo modules. To the right of the Main Menu, Performo displays a series of status widgets and metrics. The Solution Admin will be able to control which key performance indicators are visible, accessible and available to different user types. Many of the metrics and status widgets are interactive – each user will be able to choose a view.

Click the **OVERVIEW** button. Performo displays the widgets for Status, Work Order History, Work Order Requests, Overdue Work Orders, and Open Work Orders. Use the sliding handles on top of the Work Order History widget to change where the starting and ending month is and how wide each month is.

Open Work Orders can be displayed by type, by building, or by assign to.

INTERACTIVE STATUS WIDGETS

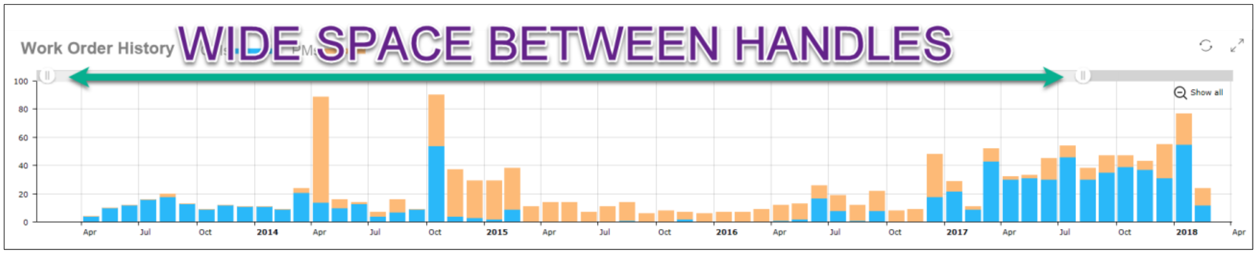


Figure 25 Work Order History Widget - displays all history

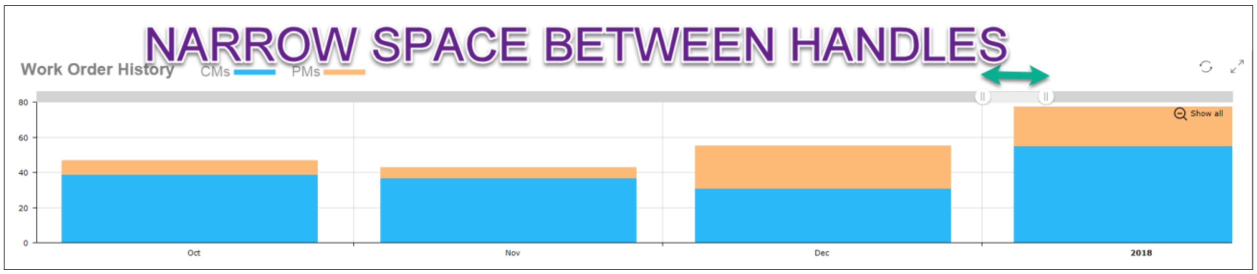


Figure 24 Work Order History Widget - displays quarterly results

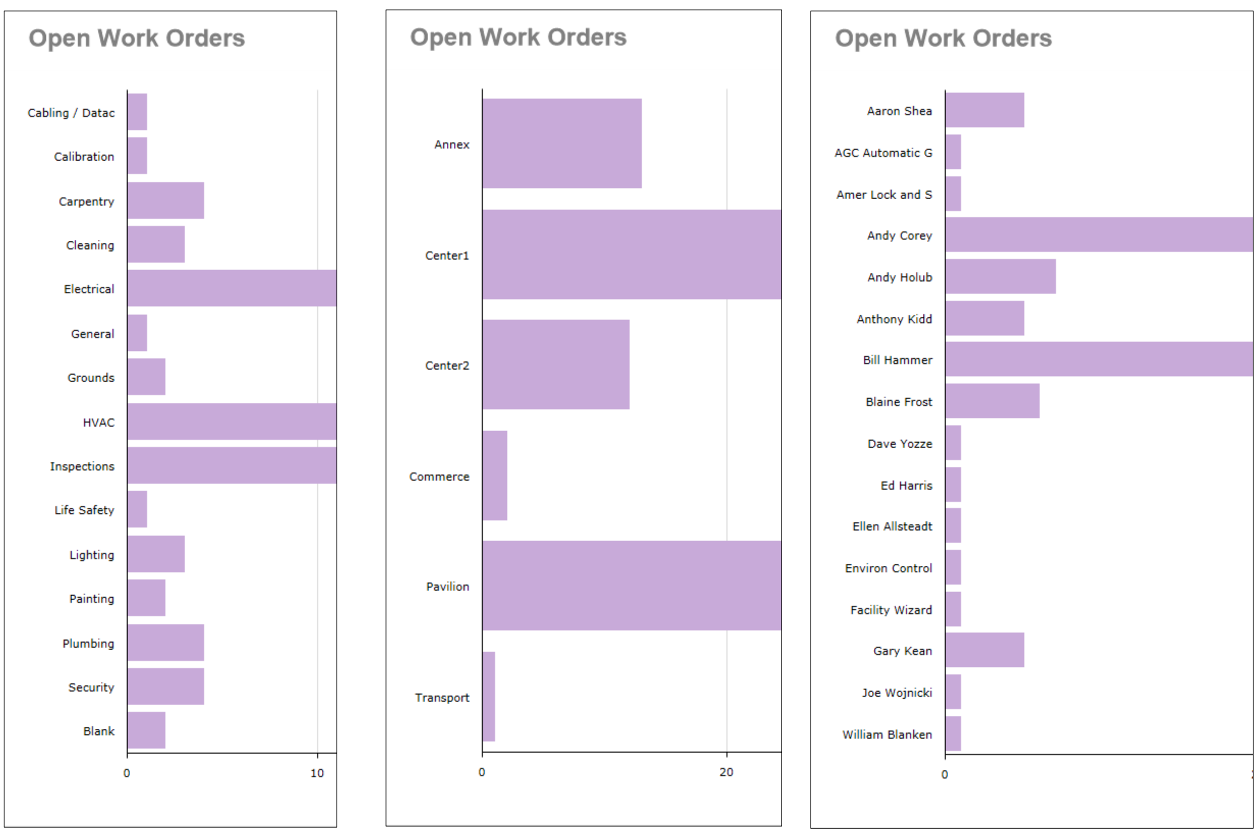


Figure 23 Open Work Order Status Widget - user definable views offers three different ways to view the same data

KEY PERFORMANCE INDICATORS ON THE HOME SCREEN

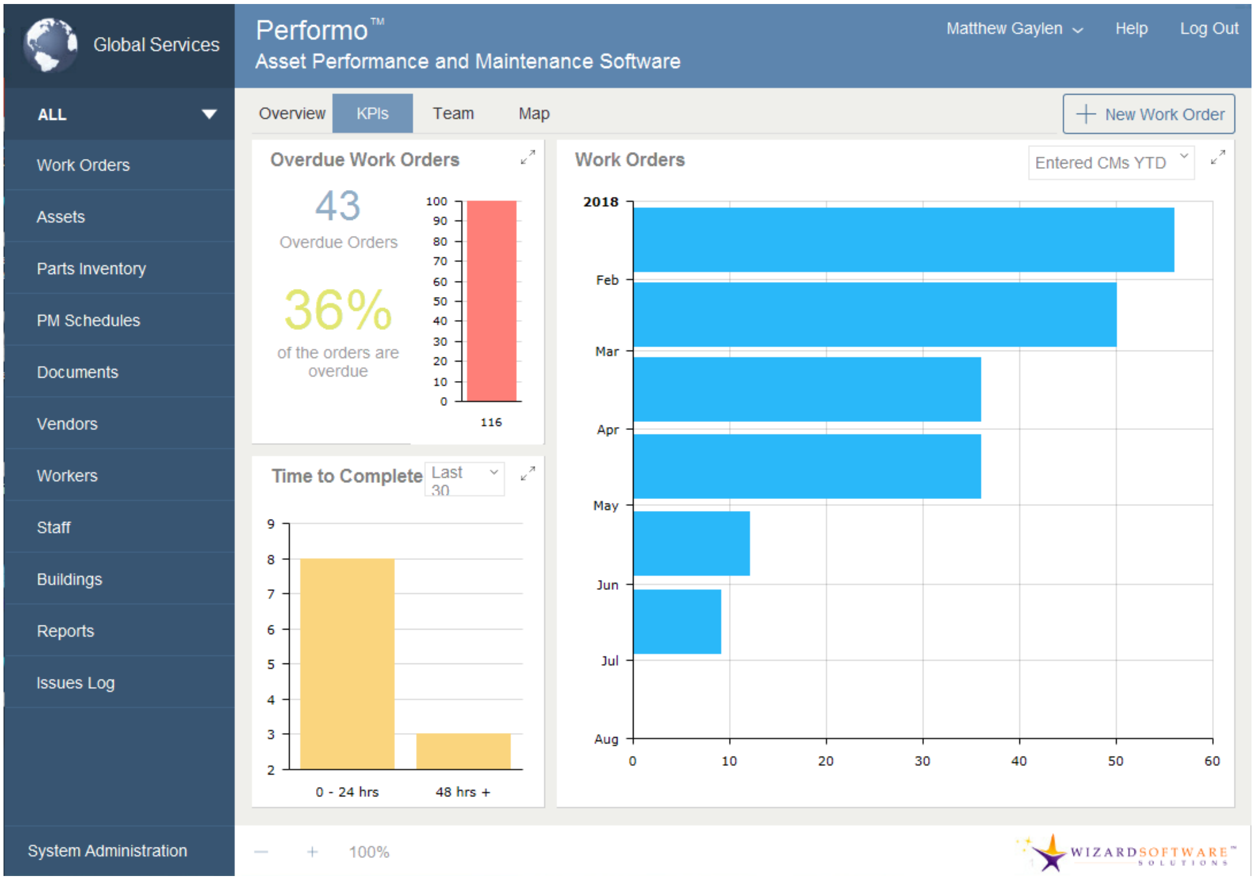


Figure 26 KPIs on the Home Screen

Click the **KPIs** button to view charts and graphs related to key performance indicators. KPIs include Overdue Work orders, Time to Complete in hours, and selections of Work Orders including corrective maintenance orders, preventive maintenance orders, completed work orders, work orders year to date, and work order requests.

TEAM INFORMATION ON THE HOME SCREEN

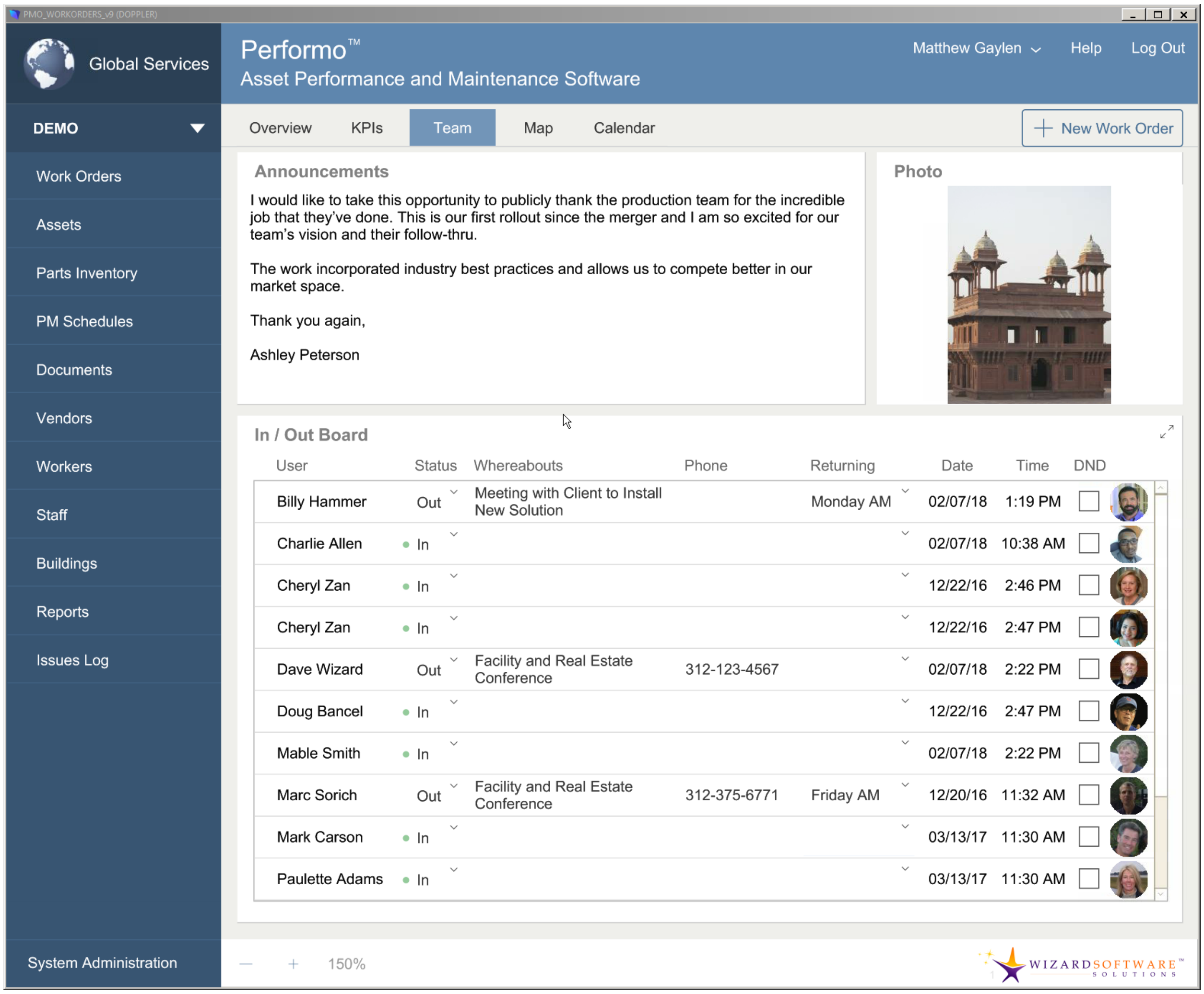


Figure 27 Team Information on the Home Screen

Click the **TEAM** button on the Home Screen. Performo automatically displays Announcements, the In/Out Board, and the Photo container field. Right-click on the photo container to view options for inserting an image. If there is a photo in the clipboard, then the Paste command places that image into the container field. The Solution Admin oversees editing the announcements text. The checkbox for displaying a user on the In/Out board is on the detail view of the system user record that the Solution Admin manages.

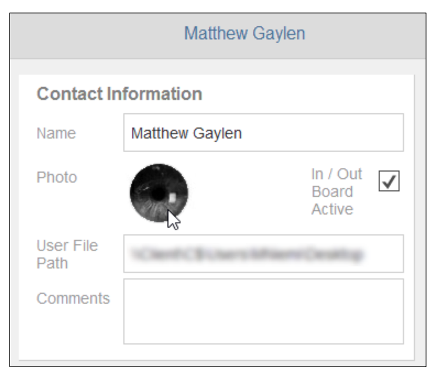


Figure 28 Contact Information

MAP ON THE HOME SCREEN

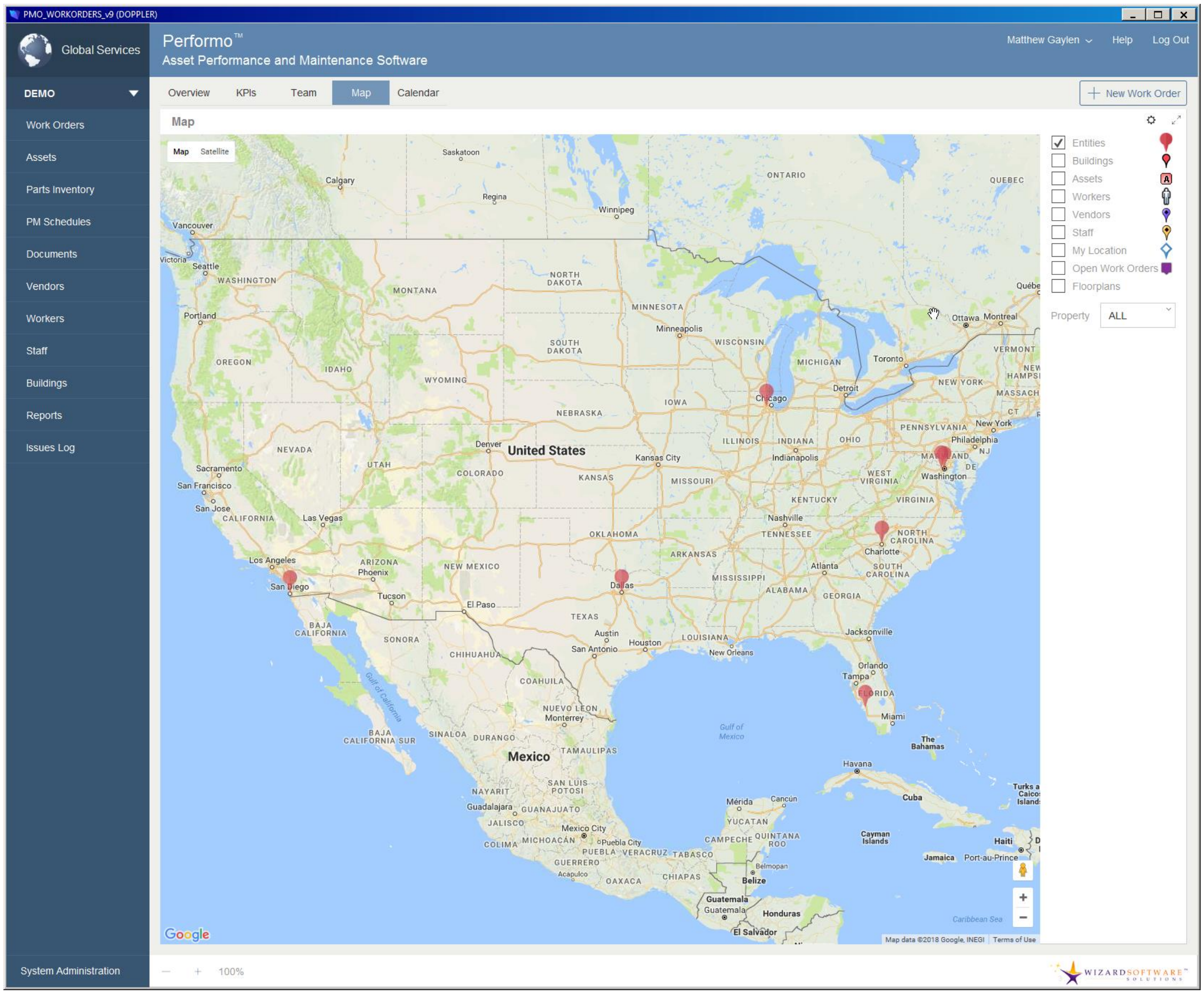


Figure 29 Map on the Home Screen – Corporate Divisions on the US map…

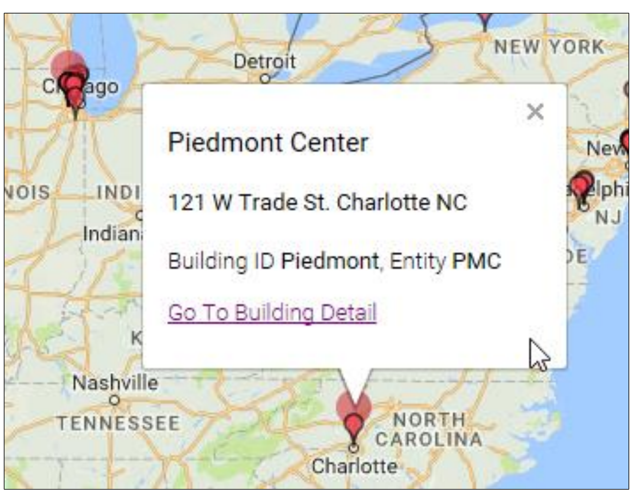


Figure 30 Go To Detail…

Click the **MAP** button on the Home Screen. Performo displays the Google map. Google maps are user-definable and can display map or satellite imagery of a selected Property, and, or Buildings, Assets, Workers, Vendors, Staff, *My Location*, Open Work Orders, and Floorplans. Click the teardrop to view details about that item or location.

Zoom

The Zoom buttons on the bottom left of the Home Screen allow users to make the solution bigger or smaller. Click the **+** button to make the solution bigger. Click the **–** button to make the solution smaller. Options are 75 percent, 100 percent, and 150 percent.

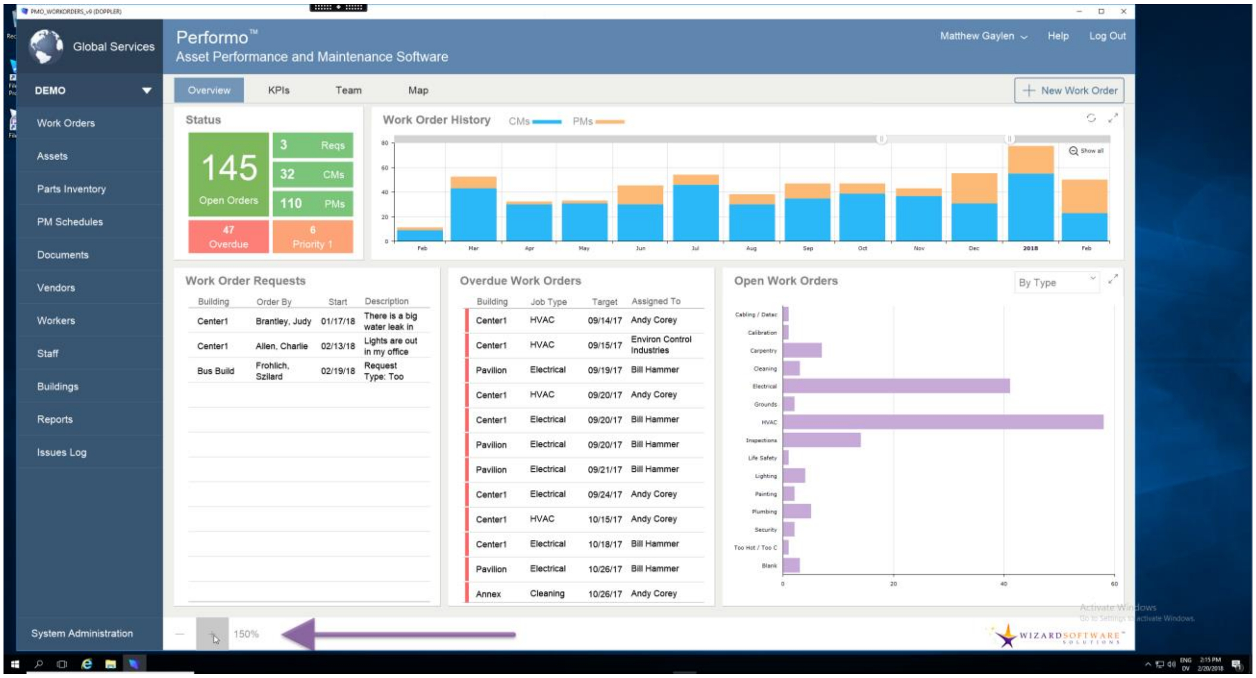


Figure 31 Zoomed to 150 percent

Main Menu

Each button on the Main Menu navigates to the list view for that module. Click the **PROPERTY** value list. Performo will display items for that property in all modules.

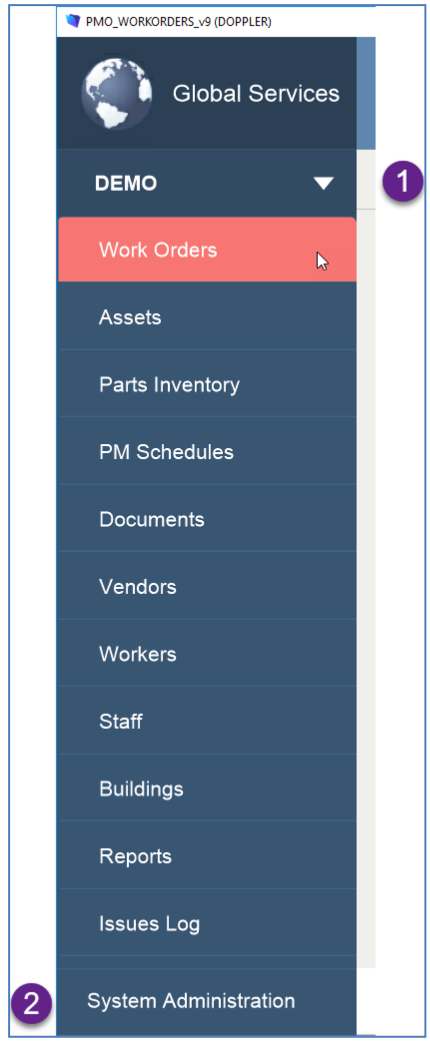


Figure 32 Main Menu

WORK ORDERS Displays the work order list. Create, edit and manage work orders.

ASSETS Navigates to the list of assets. Create, edit and manage assets.

PARTS & INVENTORY Displays the Parts Inventory List. Manage transactions, requisitions, purchase orders, and reconciliations.

PM SCHEDULES Displays the list of preventive maintenance schedules. The master list of PM schedules and procedures is maintained in the PM Schedules module. PM schedules automatically create PM work orders based on criteria determined in the detail of the PM schedule.

DOCUMENTS Displays a list of documents having been attached to work orders and assets.

VENDORS Displays the list of vendors employed by the company, institution or organization.

WORKERS Displays the list view of workers. Manage workers, privileges, rates, contact information, trades and entity assignments.

STAFF Navigates to the contacts directory. The **ORDER BY** value list displays staff names. Staff are often referred to as *requesters.* The Staff field on the work order detail view is called *Requested By.*

BUILDINGS Navigates to the list view. Manage the list of buildings, floors, and rooms.

REPORTS Displays the Reports Menu. Includes access to standard, custom and scheduled reports.

SYSTEM ADMINISTRATION The system administration button displays the menu used to navigate to the management modules. Someone will be designated to be the *Solution Admin*… the Solution Admin oversees System Administration modules.

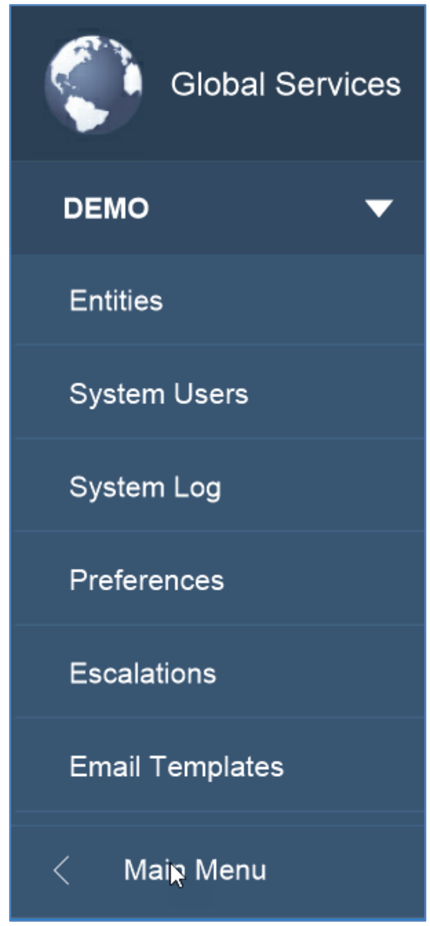


Figure 33 System Admin

ENTITIES are described in the Glossary at the beginning of this document. The Solution Admin manages entities. Tabs within the Entities module include General, Preferences, Buildings, Parts PO Form, and Map coordinates.

SYSTEM USERS. Manage Account Information, Contact Information – including a photo, access to Entities, Windowing, and Worker Interface Settings.

SYSTEM LOG. The system log displays basic information about events such as nightly scripts, logon, and users.

PREFERENCES is for managing defaults for property labels, reassign reasons, work orders, web requests, the holiday list, screen auto-refresh, logos and logo text, network, and email settings, names of asset fields, the Home Screen announcement message, and custom reports.

ESCALATIONS is for managing rules for if and when work orders are automatically re-prioritized.

EMAIL TEMPLATES is for managing the messages that are sent to workers, requesters, and administrators when work orders are created, assigned, denied, escalated, and completed.

Work Order Module

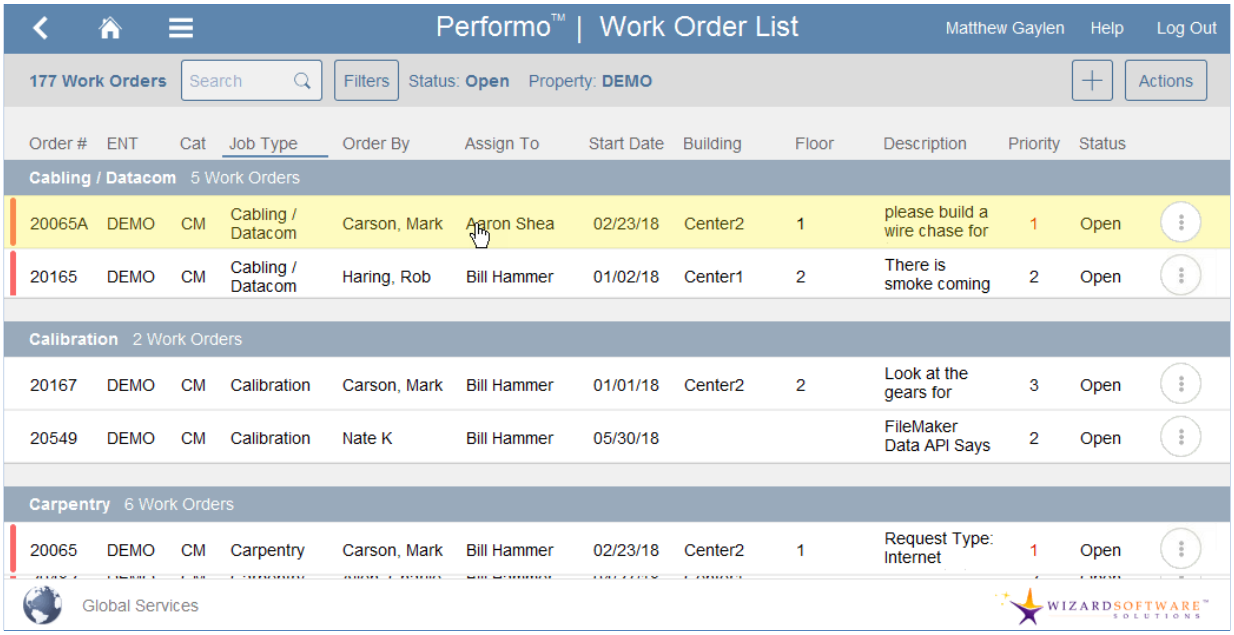


Figure 34 Work Order List View

▷Video **Work Order List View**

The Work Order List view displays high level information for each work order. Each line represents a single work order. *Open* work orders are displayed by default. The orange vertical line at the left of the row indicates an approaching due date. The red vertical line at the left of the row indicates a due date in the past.

The list is sorted by work order number by default. Each click on a column heading toggles the sort order between ascending and descending. Where it makes sense, Performo automatically adds subsummaries to the list view – for example; the subsummary is automatically displayed when the user clicks the column heading for job type, building or order by. (Figure 34 is sorted by Job Type).

The Actions bar above the list view displays the number of items in the found set, the global search field, the FILTERS button, and details about the found set, as well as the ADD NEW ITEM BUTTON and the ACTIONS MENU button. The Actions Menu displays a list of things that can be done with the found set.

Click anywhere on a line that is shaded yellow. Performo displays the detail view for that work order.

ACTIONS ON THE WORK ORDER LIST VIEW

Actions on the Work Order List view include; Map Work Orders, Work Orders List Report, Work Orders Batch Report, and Custom Report.

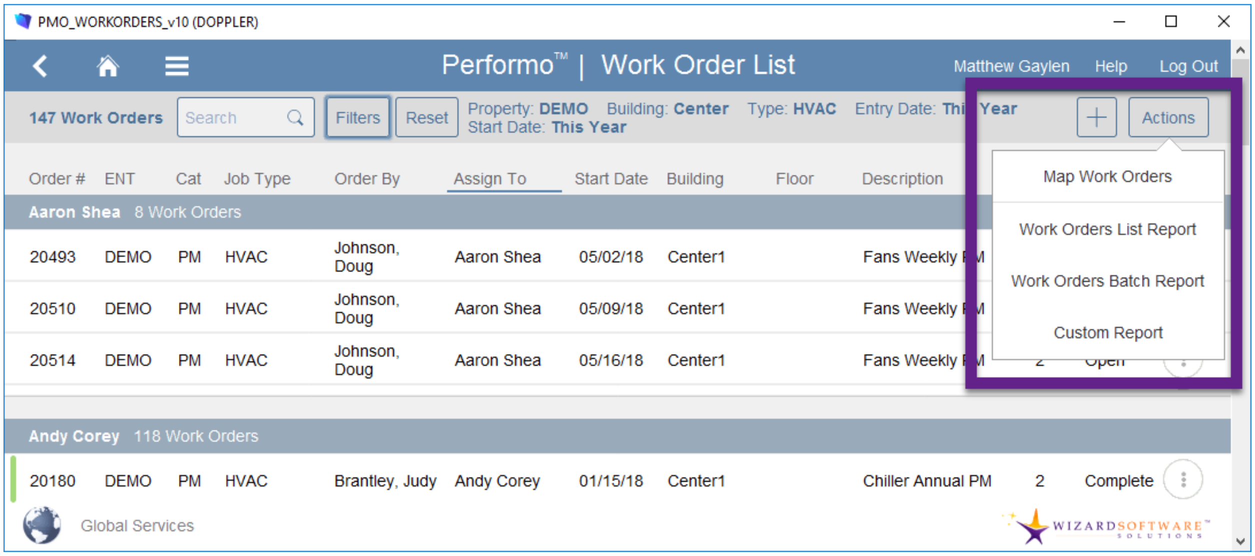


Figure 35 Actions on the Work Order List View

MAP WORK ORDERS

Click the **MAP WORK ORDERS** option on the Actions Menu of the Work Order List screen. Performo displays the Google Map. 1) The locations of work orders are denoted with purple boxes. The number inside the purple box denotes the number of work orders at that location. 2) Click the purple box to view details about the work orders at that location. Details include building name, Entity, and a hotlink to Work Orders. Click the hotlink. Performo displays the work orders at that location on the Work Order List view. 3) Choose Map View or Satellite view. 4) Choose zoom level. In certain circumstances, street view is available. 5) Click the **BACK** button. Performo displays the work order list view. Click the **HOME SCREEN** button. Performo displays the Home Screen.

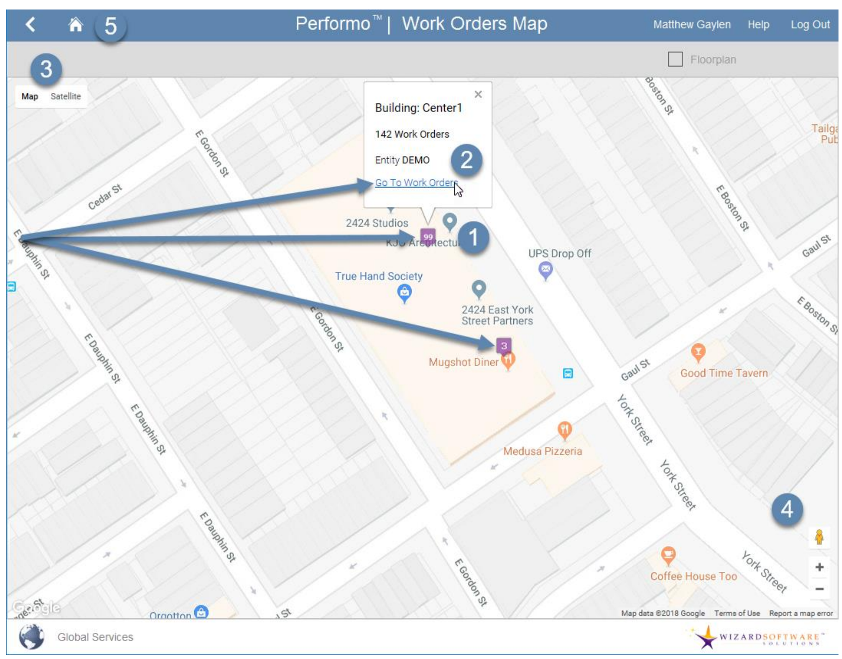
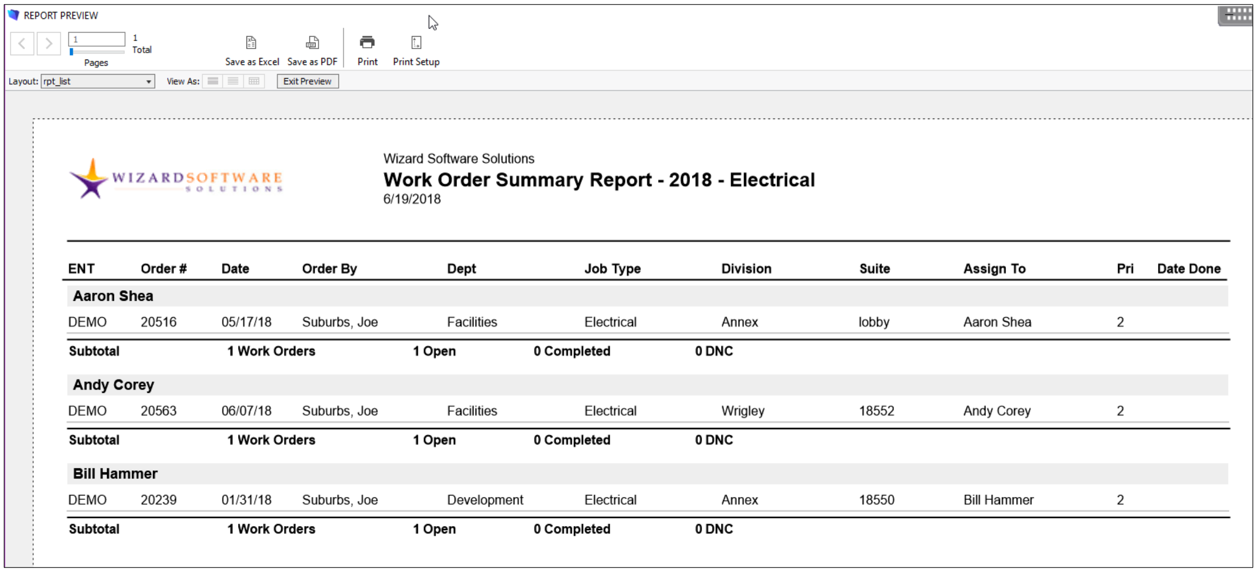


Figure 36 Map Work Orders

WORK ORDERS LIST REPORT

The Work Order List report displays the found set of records sorted the way it appears on screen. Click the **WORK ORDERS LIST REPORT** option on the Actions menu on the Actions bar on the Work Order List screen.



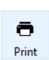
Wizard Software Solutions
Work Order Summary Report - 2018 - Electrical
6/19/2018

ENT	Order #	Date	Order By	Dept	Job Type	Division	Suite	Assign To	Pri	Date Done
Aaron Shea										
DEMO	20516	05/17/18	Suburbs, Joe	Facilities	Electrical	Annex	lobby	Aaron Shea	2	
Subtotal		**1 Work Orders**		**1 Open**	**0 Completed**	**0 DNC**				
Andy Corey										
DEMO	20563	06/07/18	Suburbs, Joe	Facilities	Electrical	Wrigley	18552	Andy Corey	2	
Subtotal		**1 Work Orders**		**1 Open**	**0 Completed**	**0 DNC**				
Bill Hammer										
DEMO	20239	01/31/18	Suburbs, Joe	Development	Electrical	Annex	18550	Bill Hammer	2	
Subtotal		**1 Work Orders**		**1 Open**	**0 Completed**	**0 DNC**				

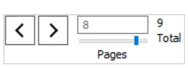
Figure 37 Work Order Summary Report

Performo displays a message dialog box. Click the **SUMMARY** button to view one line for each order. Click the **DETAIL** button to include the work order description in the report.

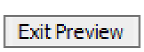
Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.



Click the **PRINT SETUP** or the **PRINT BUTTON** to view the standard operating system dialog boxes for these commands.



If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.



Click the **EXIT PREVIEW** button to return to the Work Order List view.

WORK ORDERS BATCH REPORT

The Work Orders Batch Report prints one work order for each order in the found set. This is why users must always know what the found set is. If there are 12,241 orders in the found set, then Performo will generate a 12,241-page report. The report will include one page for every work order in the found set.

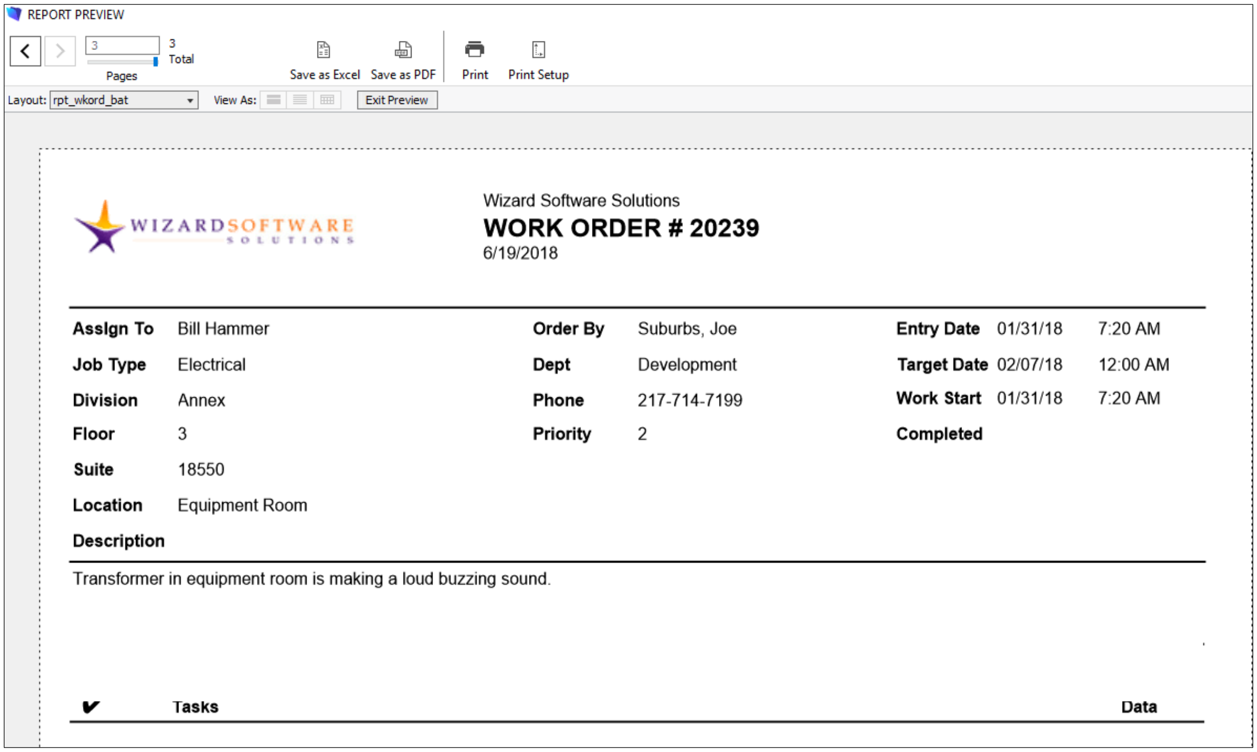
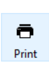
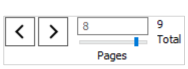


Figure 38 Work Orders Batch Report - Page #1 displayed

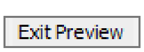
Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the save button.



Click the **PRINT SETUP** or the **PRINT BUTTON** to view the standard operating system dialog boxes for these commands.



If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.



Click the **EXIT PREVIEW** button to return to the Work Order List view.

CUSTOM REPORT

Click the **CUSTOM REPORT** option on the Actions menu on the Actions bar on the Work Order List screen. Performo displays the Run Custom Report data entry window. Previously created custom reports appear in the list.

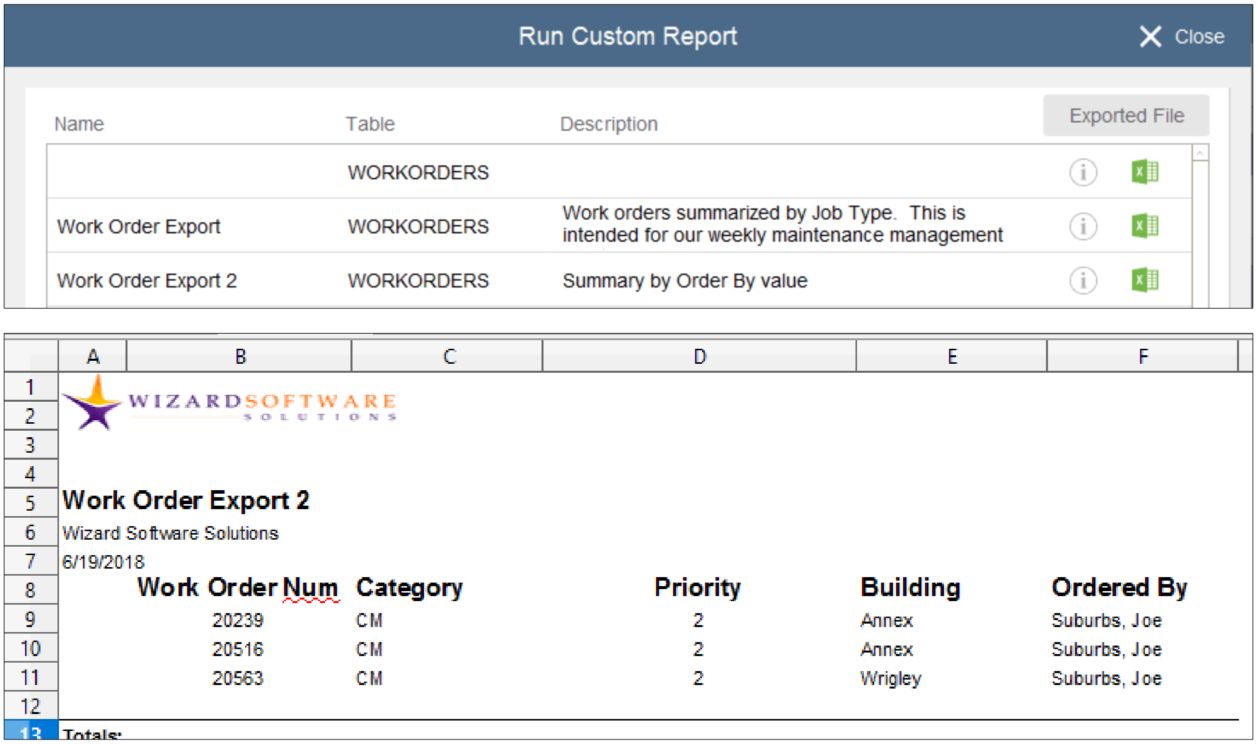


Figure 39 Top: Run Custom Report options - Bottom: Sample Exported Custom Report

Chose the custom report to run. Click the **EXPORT TO EXCEL** button. Performo opens the operating system Select File Export Location dialog box. Use standard operating system procedures to navigate to the directory where the report needs to be saved. Depending on the operating system and settings in use, the exported file will open automatically.

Click the **CLOSE** button on the Run Custom Report data entry window to return to the Work Order List view.

▷Video **Work Order Detail – Overview Tab**

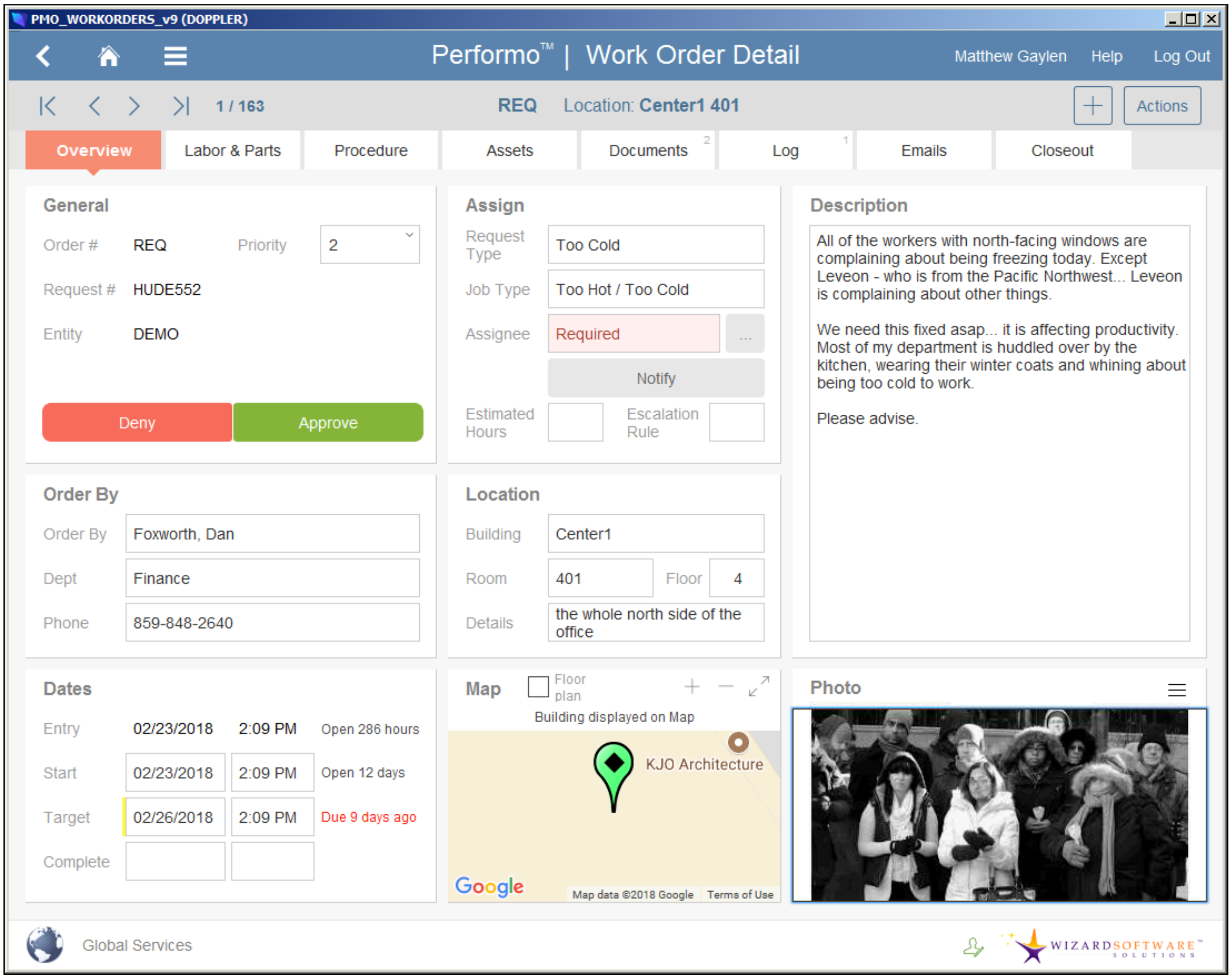


Figure 40 Work Order Detail View>Information Tab

Tabs on the top of the Work Order Detail view navigate to screens where additional information can be entered, edited or analyzed. Tabs include Overview, Labor and Parts, Procedure, Assets, Documents, Log, Emails, and Closeout. The Work Order report is accessible from the ACTIONS MENU button on the Actions Bar.

The OVERVIEW tab is where basic work order information can be entered, edited and managed. Order #, Priority, Request # and Entity are displayed under General along with the DENY button and the APPROVE button. Off-the-shelf, Priority is user-definable. Required fields are shaded light red (pink?).

Order By displays a value list of customers. Again, type-ahead is active so Performo automatically proceeds through the list as the user types. The Order By Department and Phone number are entered automatically when a selection is made.

DATES

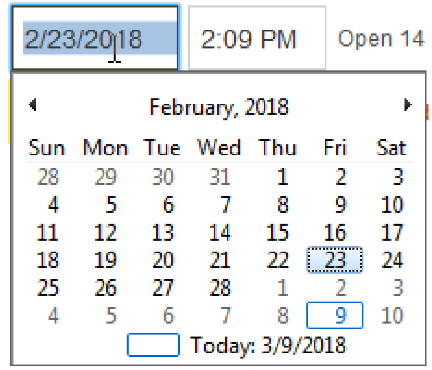


Figure 41 Use the Calendar to Enter Dates

The Dates section displays the Entry date, the Start date, the Target date, and the Complete date.

How it works: Click once to view the calendar. Use the pointing device to choose a date. Or click a second time to put the cursor in the field. Once the cursor is in the field, any date may be entered, or the existing date may be edited.

ASSIGNEE & LOCATION

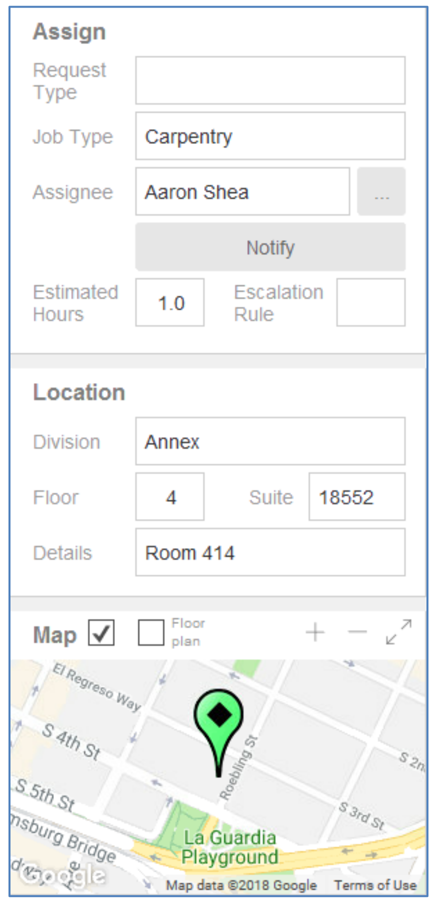


Figure 42 Assign the Work Order

Column two of the Overview tab begins with the Assign section. The Request Type comes in with the work order, having been selected by the orderer. The Job Type field is assigned by the work order admin. The Assignee is also selected. Use type-ahead to quickly access and select the assignee.

The Location section is for Building, Room, Floor and Details. Location>Details is for directing workers to exactly the right place within the building, floor and room.

NAVIGATION ON WORK ORDER DETAIL VIEW


Use the arrows located at the top, left of the work order detail view to navigate to the previous or next work order in the found set. Helpful Hint: Please do not use the Windows close box located in the upper right-hand corner because this will yield unexpected results. Please remember to use Performo's built-in navigation buttons all the time.

MAP

The Map section displays a thumbnail of where in the world the issue is located. Click the ENLARGE button to view a bigger map. In certain situations, street-view is available.

DESCRIPTION & PHOTO

The third column of the Overview tab is the Description and the Photo.

Description field *Best Practice*: Enter information in the description field so the maintenance team can determine what's needed to resolve the issue without generating a clarification phone call or email message.

Description *Best Practice II:* as much as possible use short sentences with brief, objective observations.

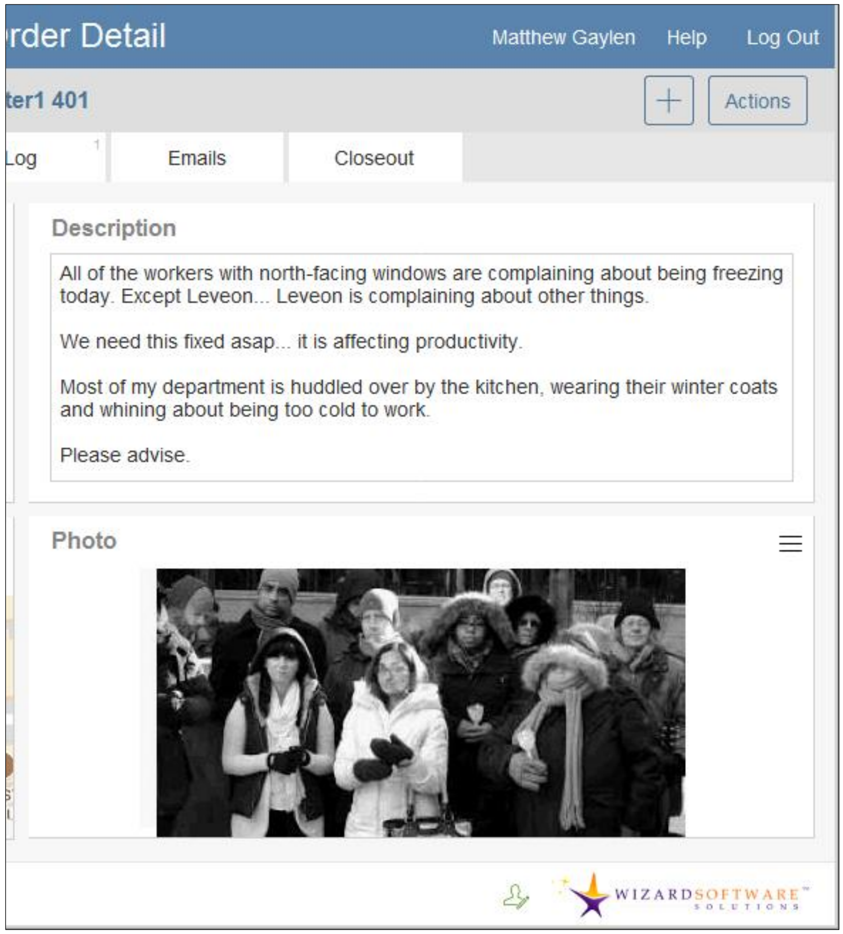


Figure 43 Photo Options – freezing employees want heat.

The Photo container stores an image of the issue. Right-click to paste the image from your clipboard into the photo-container field. Click the menu on the upper-right-hand side of the photo to view options. Possibilities include, navigating to a directory to choose a file, removing the existing photo, and enlarging the display size.

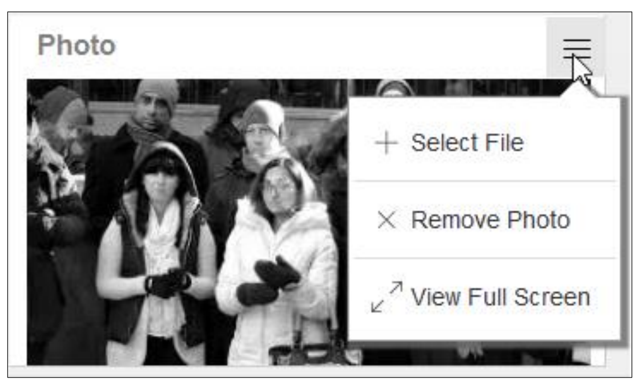


Figure 44 Photo Options Menu

DETAIL VIEW NAVIGATION

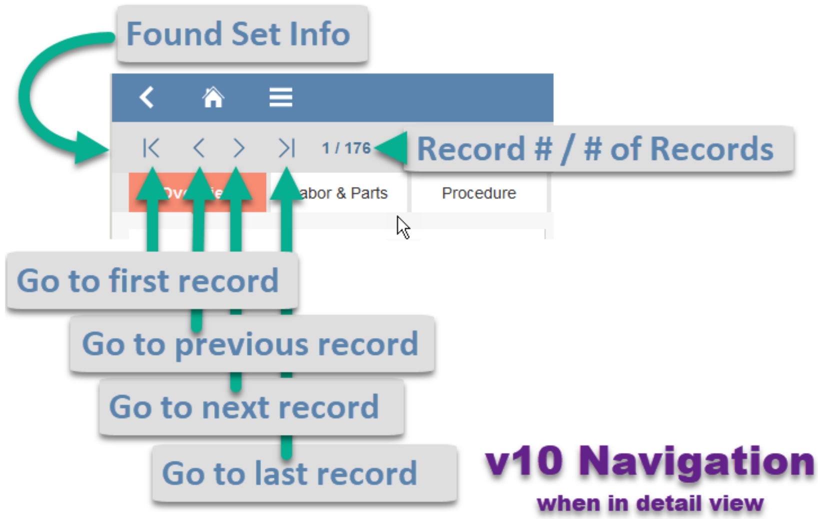


Figure 45 Work Order Detail View - the Tabs

The Actions bar displays the number of records in the found set and the number of the record currently on display.

Click the arrows on the Actions Bar to navigate to the first, last, previous or next work order in the found set.

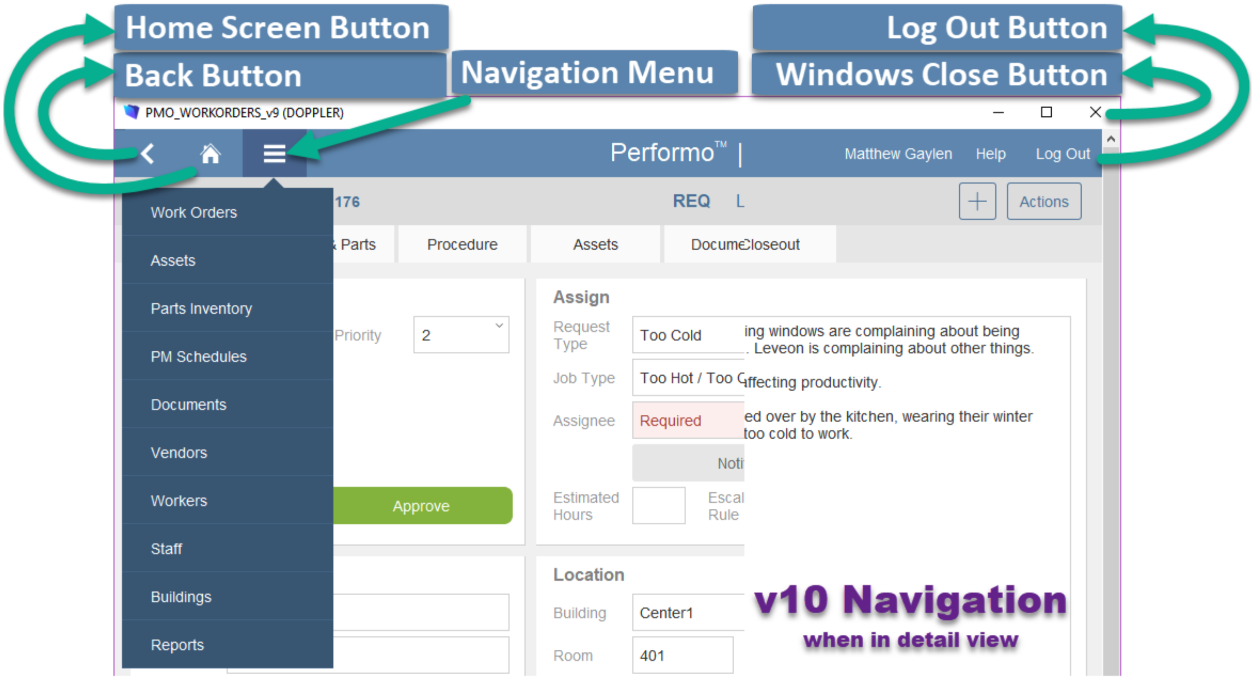


Figure 46 v10 Navigation when in detail view

When finished entering, editing, or managing data on a screen, please always use Performo's navigation buttons to proceed. Please do not use the **WINDOWS CLOSE** button located in the upper right-hand corner because this will yield unexpected results.

Click the **HOME SCREEN** button to return to the starting point.

Click the **BACK** button to go back to the previous screen. The **BACK** button terminates at the Home Screen. Go forward from the Home screen to any other Performo module.

Click the **NAVIGATION MENU** button to go directly to any other module.

Click the **LOG OUT** button to close the solution completely.

▷Video [Work Order Detail – Labor & Parts Tab]

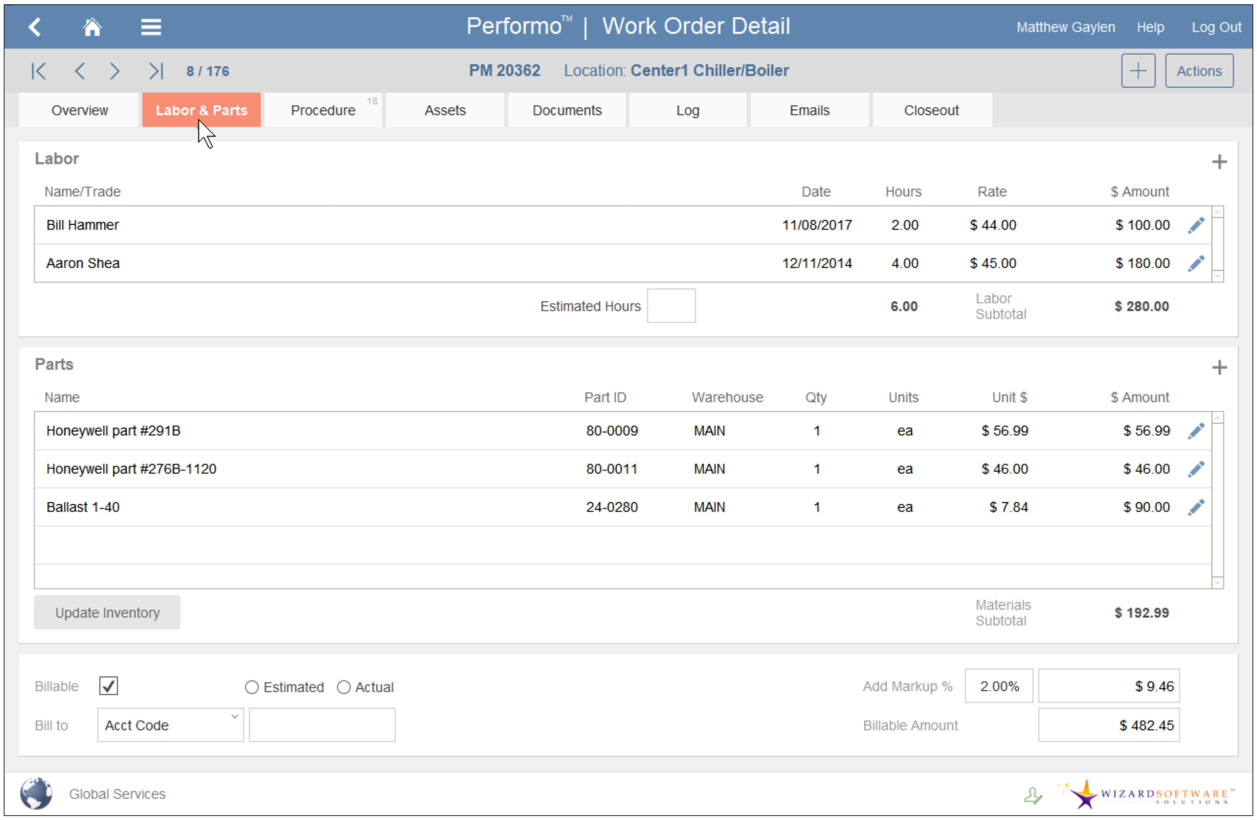


Figure 48 Labor & Parts / Time & Materials

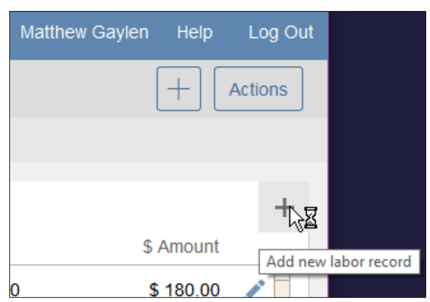


Figure 47 Add New Labor Record

Click the Labor & Parts tab. Performo navigates to the time and materials data entry screen. Labor is entered, edited, and managed in the portal directly under the Actions bar. Parts entries are entered, edited, and managed in the portal below the labor entries.

\+ Click the **+** button on the Labor section. Performo opens the Edit Labor pop up window. Choose the name of the worker who performed the labor from the value list. Type-ahead is active. The date is automatically entered. Click the date field to edit, if necessary. Enter the hours and Performo will automatically calculate the Amount. Enter the Override amount to supersede the *hours * rate* calculation.

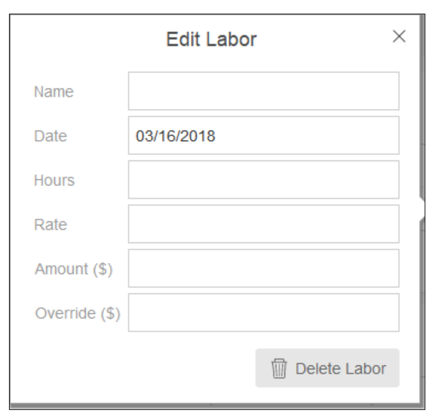


Figure 49 Edit Labor

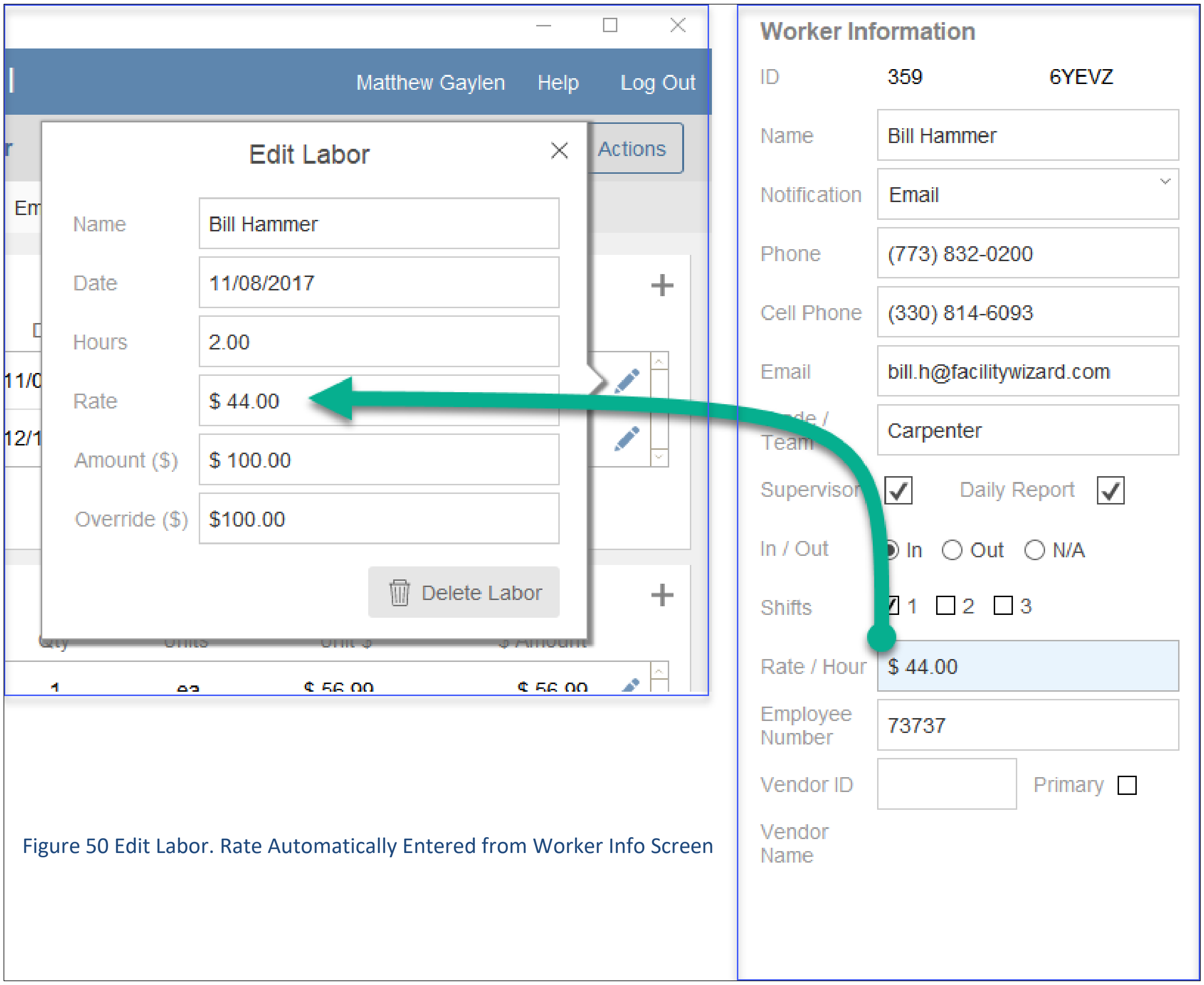


Figure 50 Edit Labor. Rate Automatically Entered from Worker Info Screen

LABOR ENTRIES

Click the **+** button to create a new labor entry. Performo automatically adds a blank line to the Labor portal and then opens the Edit Labor data entry window.

Click the **EDIT** button. Performo opens the Edit Labor data entry window. The Name, Date, Hours, Rate, Amount, and Override fields are all user-definable. Note that the Date is automatically entered as the current day. Click once to choose a date from the drop-down calendar. Click the date field a second time to put the cursor in the field to edit the standard date.

The rate is imported from the worker record. Click the **OVERRIDE** field to enter a flat fee that supersedes the hours*rate calculation.

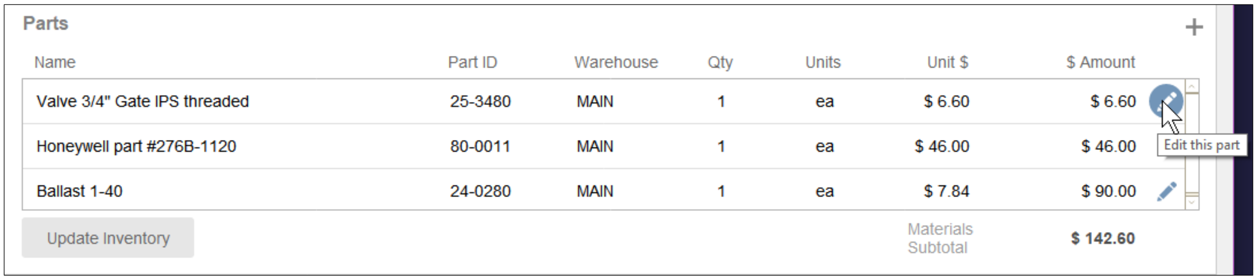
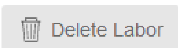


Figure 51 Entering & Editing Parts on Work Orders



Click the **DELETE LABOR** button in the Edit Labor data entry window to remove the labor record. Note there is no undo. Deleting an item is permanent.

PARTS

Entering materials is the same as entering time. Click the **+** button to create a new entry. Performo automatically adds a blank line to the Parts portal and displays the Edit Part data entry window.

Chose a part by Name or Part Code.

Click the Name field. Performo displays the Parts value list. Type-ahead is active so begin typing to move through the list to find the correct part. After selecting the Name, Performo automatically adds the Part Code.

Click the Part Code field. Performo automatically displays the Part Code value list. Type-ahead is active so begin typing to move through the list to find the correct ID number. After selecting the Part Code, Performo automatically enters the Name.

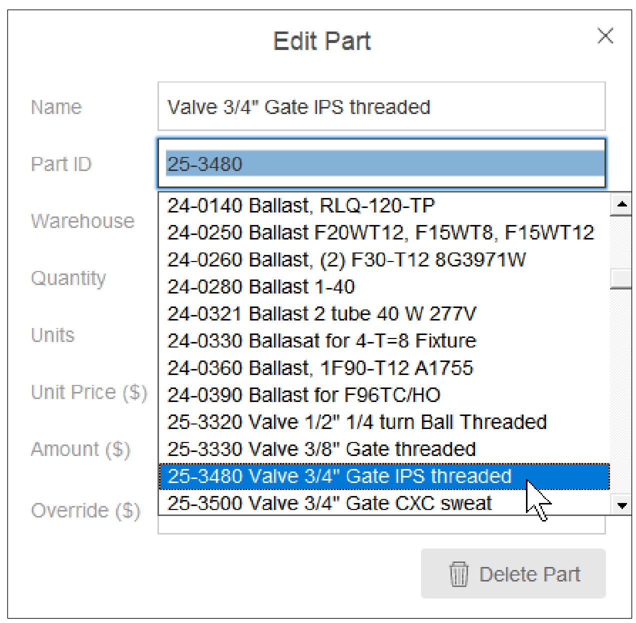
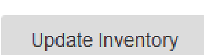


Figure 52 Edit Part Data Entry Window



Next, click the **UPDATE INVENTORY** button to deduct the part from inventory. The **UPDATE INVENTORY** button only appears if quantities have been entered in the inventory log.

TIME & MATERIALS; MATHEMATICS

Performo automatically tabulates time and materials subtotals and displays the total at the bottom of the screen. The calculation for labor is:

Hours * Rate = $ Amount.

The calculation for Parts is

Quantity * Unit $ = $ Amount.

The Additional Markup Percentage is user-definable, but the Solution Admin controls the default value.

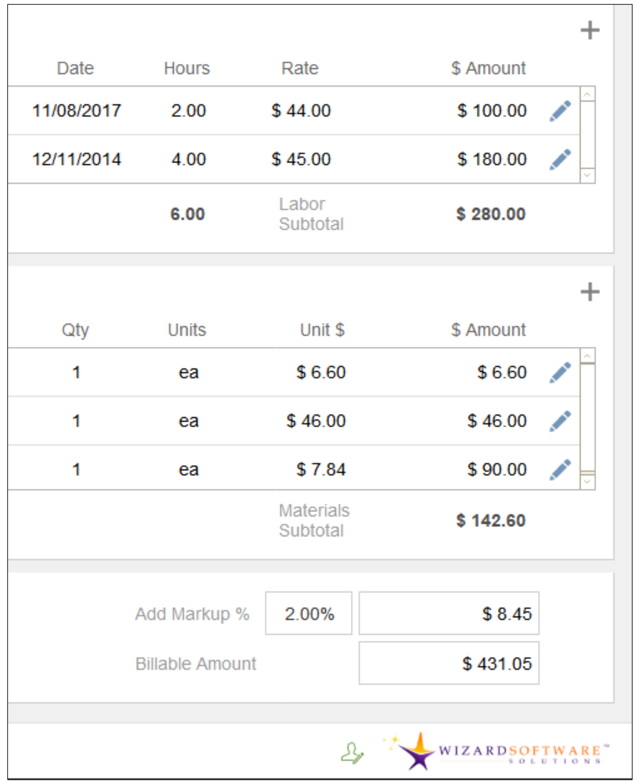


Figure 53 Time & Materials: Mathematics

BILLABLE WORK ORDERS

Click the Billable checkbox if time and materials are going to be charged back to a department, division, cost center or other entity. There are two fields to use. Click the **BILL TO** field and choose a value from the list. Click **EDIT...** to change the values in the list. Note that this changes the value list for every other Performo user. Therefore, please consult with the Solution Admin if changes need to be made to the Bill to value list.

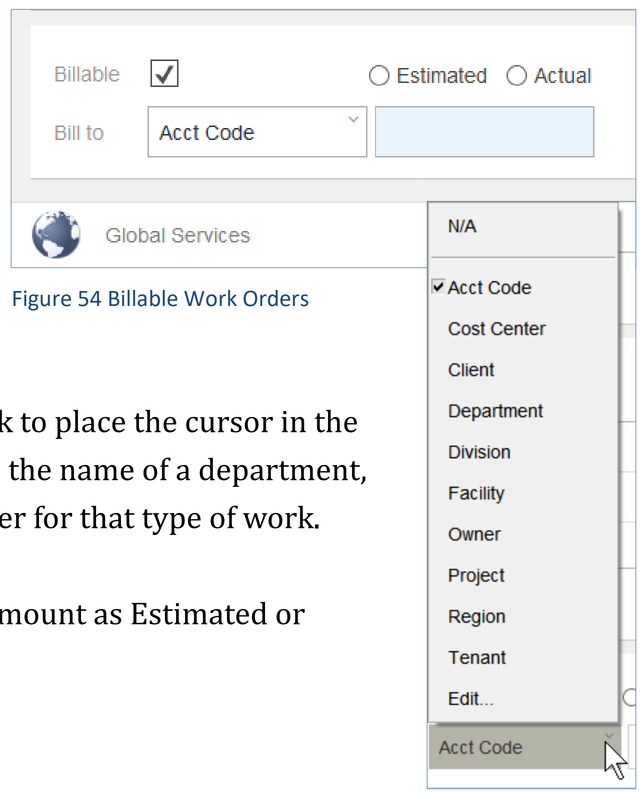


Figure 54 Billable Work Orders

The second Bill to field is user-definable. Click to place the cursor in the field. Any value may be entered. For example, the name of a department, division or facility, or the account code number for that type of work.

There are radio buttons for designating the amount as Estimated or Actual. Clicking one, deselects the other.

▷Video Work Order Detail – Procedure Tab

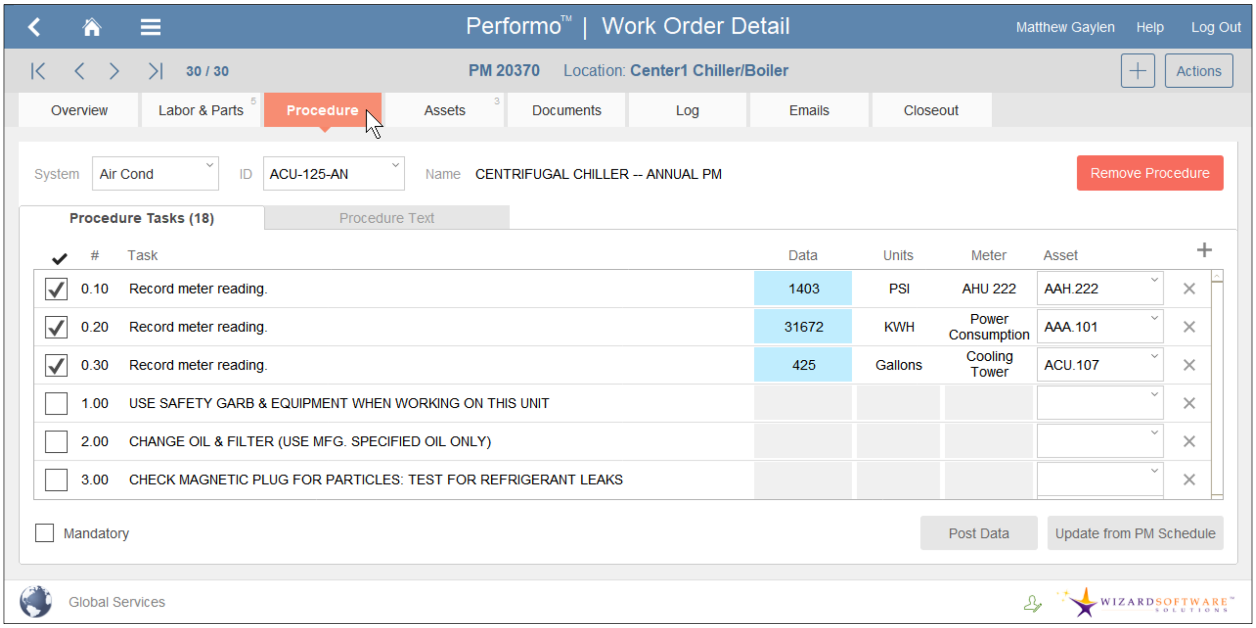


Figure 55 Procedure

There are three types of procedures used to guide the maintenance team during work order completion:

- **TEXT** is a type of procedure that specifies tasks, protocols, policies, or instructions.
- **CHECKLIST**: …click the checkbox for each task completed.
- **METER READING**: …enter meter readings.
  - Meter reading procedure steps can be attached to any asset.
  - Meters can be created, viewed, and edited in the Work Order module, the Preventive Maintenance module, and the Assets module.
  - Readings for meters not related to assets can be attached to task steps on CMs and PMs. One example of this would be a task step to record temperature on a hot/cold call.

In this section, we will discuss Master Procedures List View, Detail View, and the Master Procedure sheet. We will also provide details about adding meters to assets in the Assets module as well as setting up work orders with procedures that require meter readings. Additionally, we will discuss how to add meter readings to Master Procedures.

Please refer to Master Procedures on page #66 to view additional details.

▷Video Work Order Detail – Assets Tab

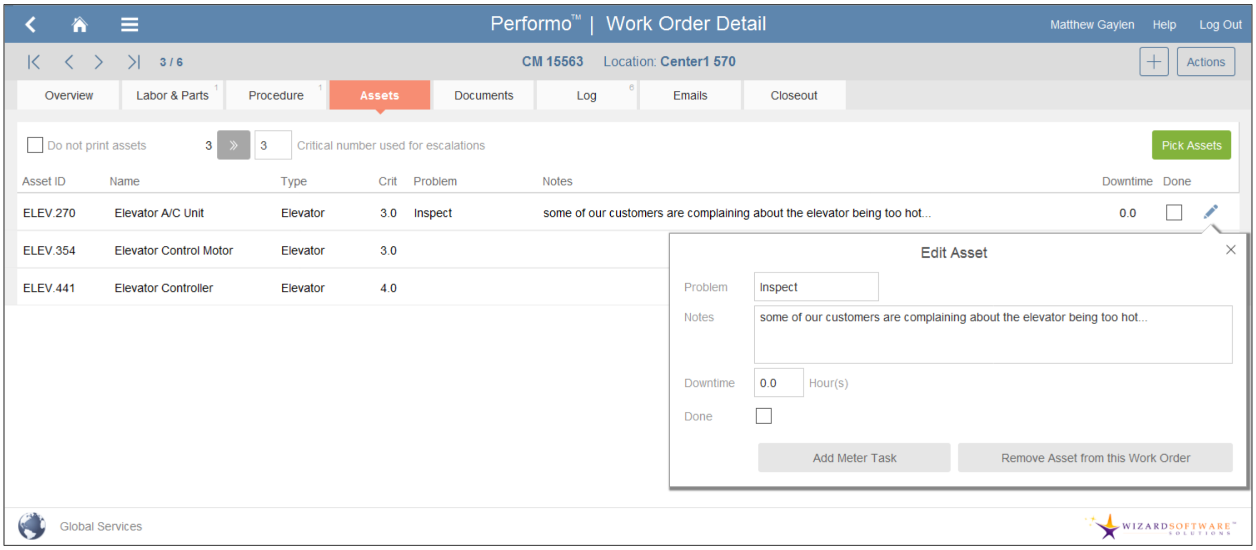


Figure 56 Assets Tab of the Work Order Detail view

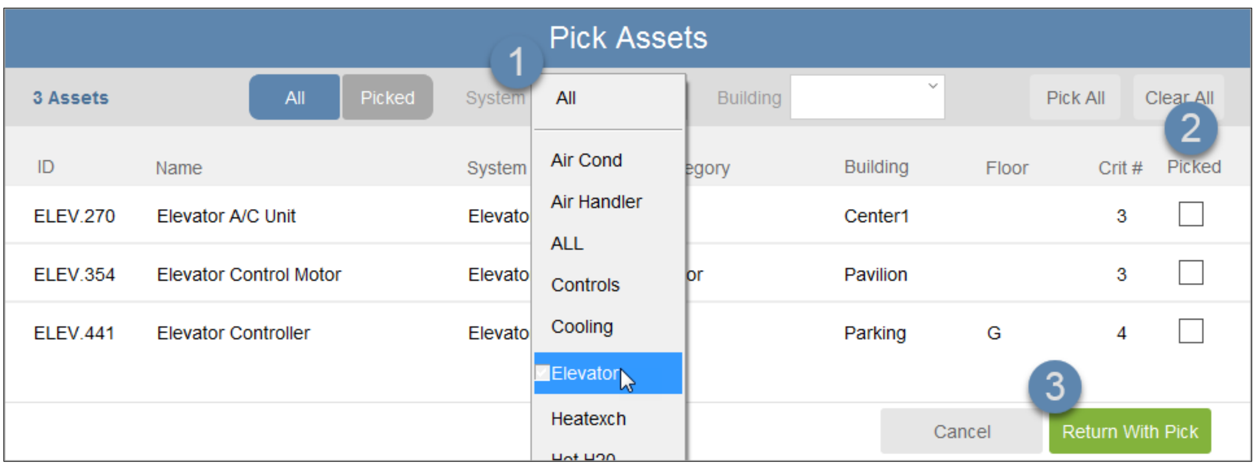


Figure 57 Pick Assets

Pick Assets

The Assets tab displays resources attached to the work order. To add an asset to a work order, click the green **PICK ASSETS** button on the Assets tab of the Work Order Detail view. Performo will automatically display the Pick Assets data entry window.

1) Click the System field to display the value list. Choose an option.

2) Click the **PICKED** checkbox for the assets that need to be added to the work order.

3) Click the **RETURN WITH PICK** button. Performo adds the asset to the work order, closes the Pick Assets data entry window, and displays the Assets tab of the Work Order Detail view.

EDIT ASSET DATA ENTRY WINDOW

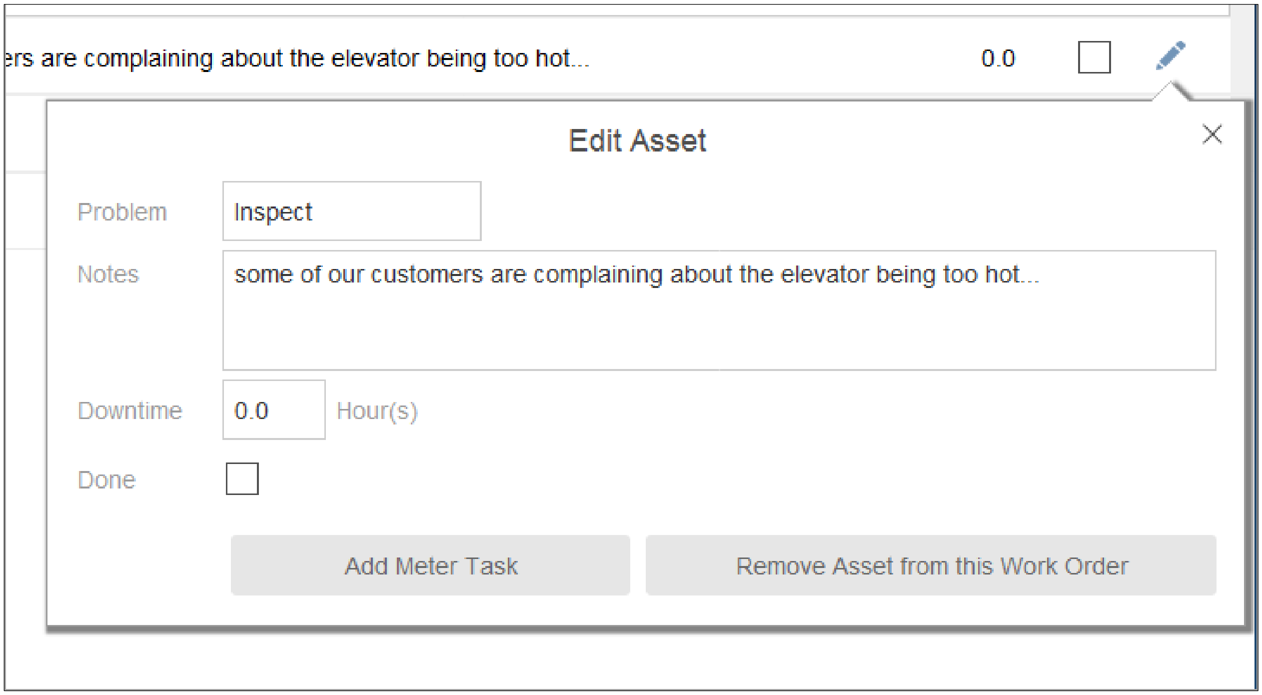


Figure 58 Edit Asset data entry window

The edit icon appears in the shape of a pencil to the far right of each asset record. Click the **EDIT** button. Performo displays the Edit Asset data entry window.

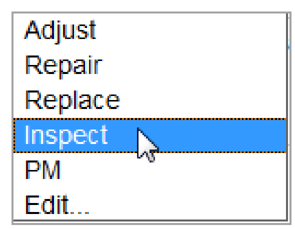
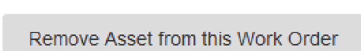


Figure 59 Problem Value List

Choose a value from the Problem value list.

Enter notes about the asset.

Estimate the downtime if necessary.



Click the **REMOVE ASSET FROM THIS WORK ORDER** button to remove the record permanently. Confirmation is required because there is no undo.

ADD METER TASK BUTTON

Click the **ADD METER TASK** button in the Edit Assets data entry window. Performo displays the Add Meter Reading Tasks dialog box. "This will create a task to read a meter for this asset." Click the **OK** button to proceed.

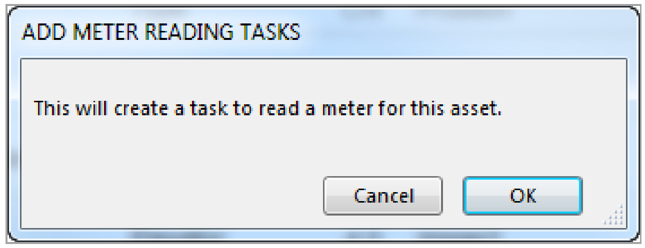


Figure 60 Add Meter Reading Tasks

Performo automatically closes the Edit Assets data entry window; then navigates to the Procedure tab of the Work Order Detail and displays a blank, unnumbered, ad hoc meter reading record. The Asset field is automatically filled in with the asset number.

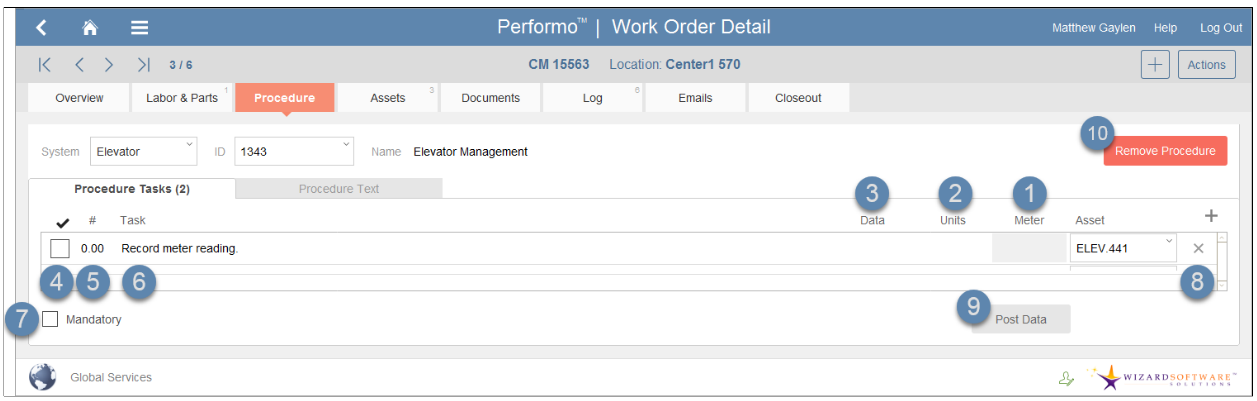


Figure 61 Meter Reading having been added from Add Meter Task button in the Edit Assets data entry window

1) Enter the ad hoc meter name (a meter not previously attached to the asset).
2) Enter the units to be used for the meter reading.
3) When the work order is completed, the Data for the meter reading will be entered.
4) Click the **DONE** checkbox to indicate the meter reading task step has been completed.
5) Click to enter the serial number for the task step in the # column.
6) Click to edit the task description.
7) Click the **MANDATORY** checkbox to require that the **DONE** checkbox be clicked prior to closing out the work order.
8) Click the **X** checkbox to remove the procedure task step.
9) Click the **POST DATA** button to record the meter reading on the Meters portal in the Assets module.
10) Click the **REMOVE PROCEDURE** button to permanently remove all the tasks steps.

▷Video

Work Order Detail – Documents Tab

The Documents tab of the Work Order Detail view allows users to interact with previously published content. Documents may be added to the work order and viewed by engineers in the field. Click the **DOCUMENTS** button on the Work Order Detail view. Performo displays the Documents portal.

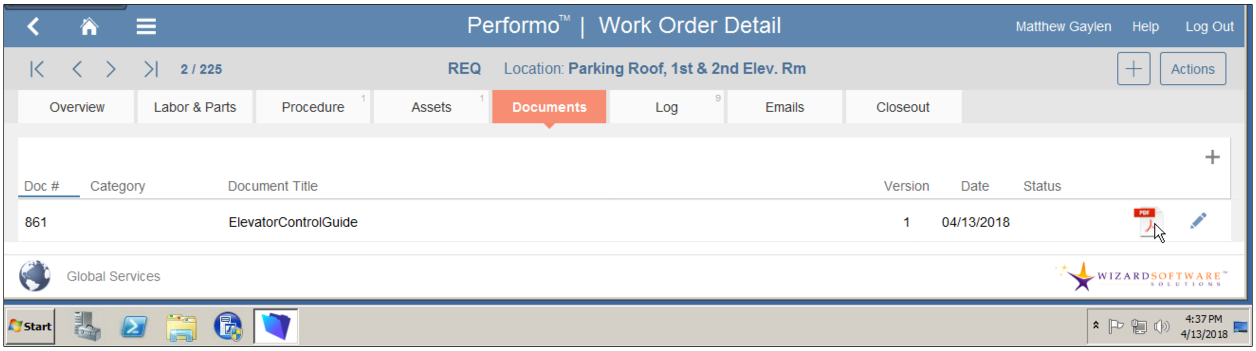


Figure 62 Documents attached to a work order

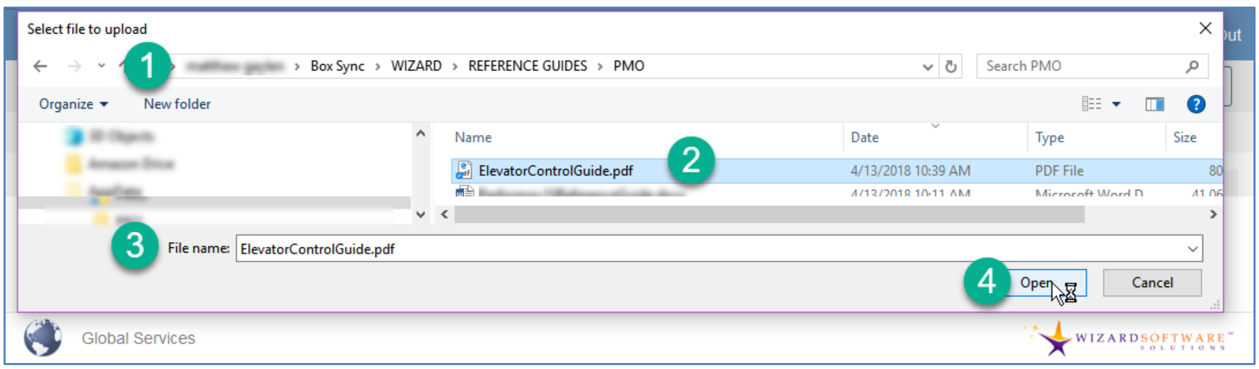


Figure 63 Select File to Upload

\+ Click the **+** button. Performo opens the operating system's *select file to upload* dialog box. The file is copied from its original directory and stored in the container field. Uploaded, attached files are accessible to Performo users. When an attached file is launched, it opens in the program that created it; if that application is available on the computer running Performo. Changes made to attached files are saved with the document, but do not affect the original. Figure 63 shows the four most common steps to navigating to and choosing a file to upload and attach.

Contact the Solution Admin if assistance is required interacting with the *select file to upload* dialog box.

EDIT DOCUMENT

The **EDIT DOCUMENT** button appears in the shape of a pencil icon. Click the **EDIT DOCUMENT** button. Performo displays the Edit Document data entry window.

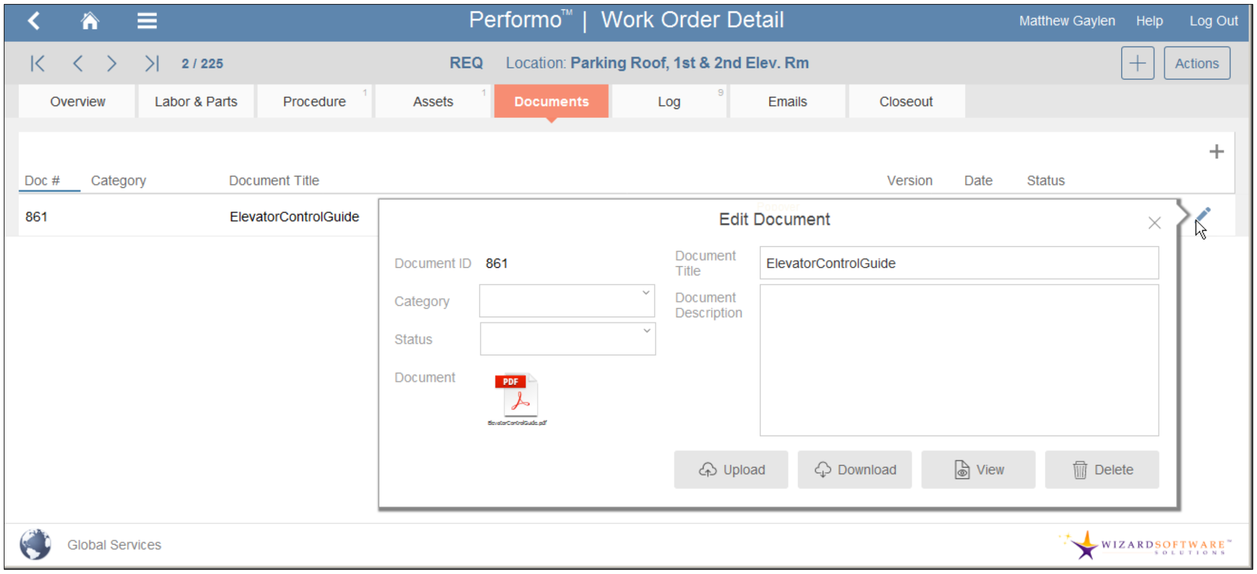


Figure 66 Edit Document

Choose a Category the value list.

Choose a Status from the value list. The Solution Admin oversees the Category and Status value lists.

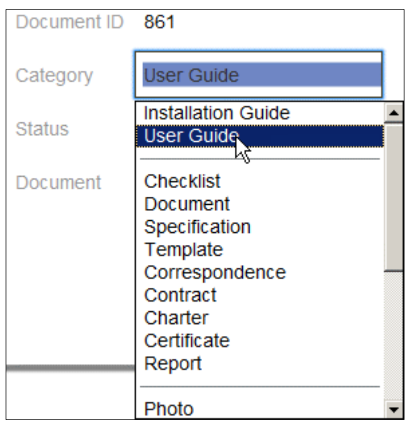


Figure 64 Document Category

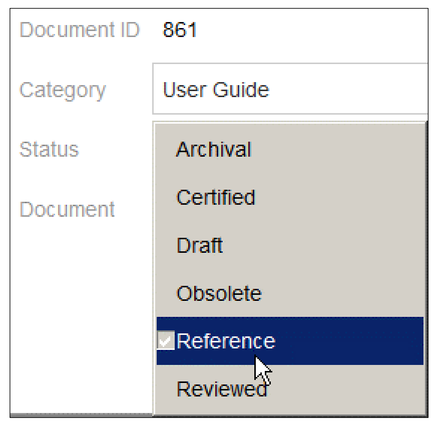


Figure 65 Status

The document title is automatically imported during the upload process. However, click to put the cursor in the field to edit the document title. Enter a document description.

Click the **UPLOAD** button to attach a different document.

Click the **DOWNLOAD** button to copy the document to another directory.

Click the **VIEW** button to open the document in the application in which it was created.

Click the **DELETE** button to remove the document from the container.

DOCUMENT DETAIL

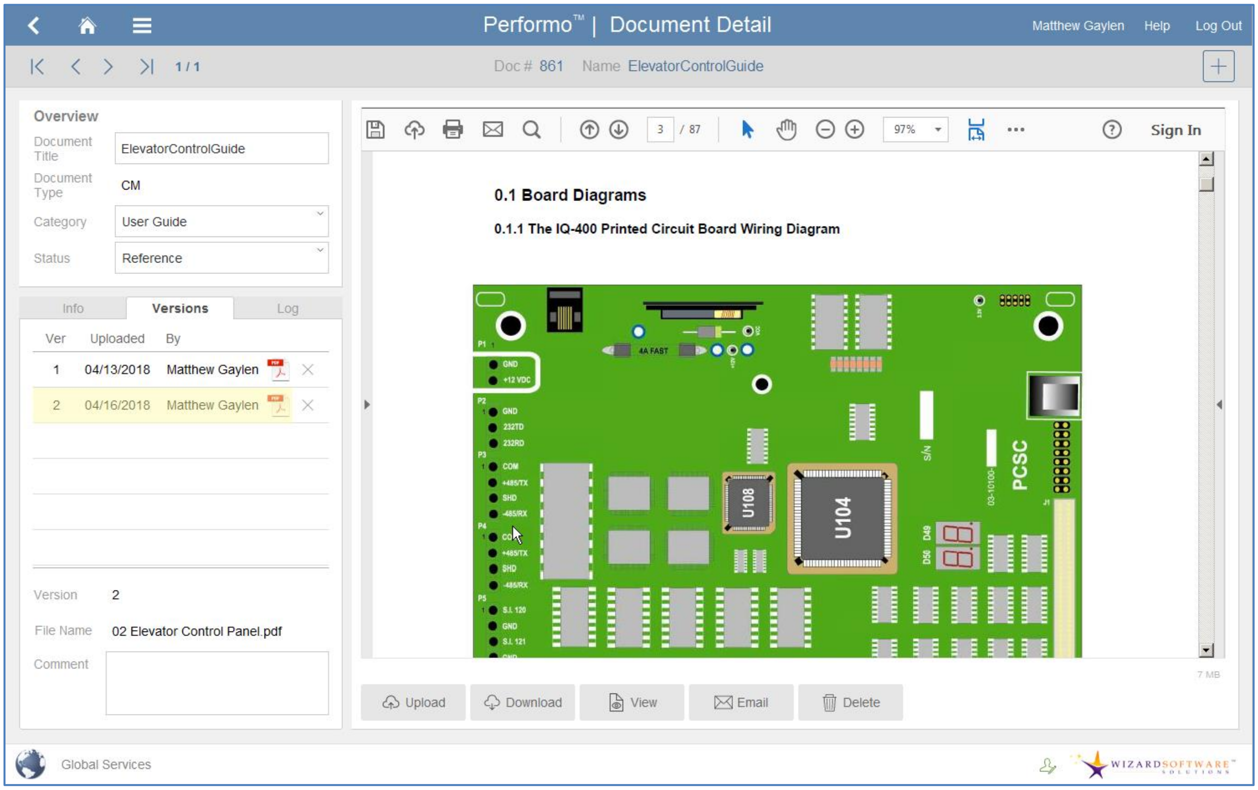


Figure 67 Document Detail view

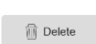
In list view, click anywhere on a document record. Performo displays the Document Detail view. The left side of the display is the Overview section and tabs for Info, Versions, and the Log. The right side is the document container field. The document container field is interactive.

Click the **DOWNLOAD** button. Performo will open the Save As dialog box. The document may be saved in any accessible directory.

Click the **UPLOAD** button. Performo will open the Select File to Upload dialog box. Uploaded documents are stored as versions on top of each other see Figure 68.

Click the **VIEW** button. Performo will open the document in the application that created it; if that program is available on the computer where the document is being viewed.

Click the **EMAIL** button. Performo will open the default electronic mail client, and automatically attach the document.



Click the **DELETE** button. Upon confirmation, Performo will remove the document from the container field.

DOCUMENT VERSIONS

Please be aware that uploaded documents are stored as versions on top of each other. The most recent one is displayed by default. Links to the uploaded documents appear in the Versions tab on the left side of the document container field.

Click the **VERSIONS** tab. Performo displays document versions.

The version being displayed in the document container is highlighted yellow.

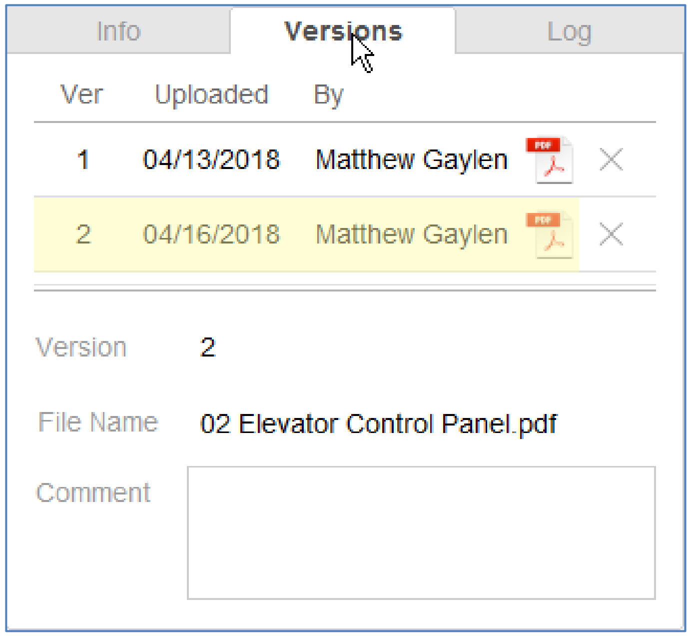


Figure 68 Document Versions

Click any record in the Versions portal. Performo displays that version in the container field.

Click the **DELETE** button on the right side of the portal to permanently delete that version of the document. Note that there is no undo. Once the document version is removed – it cannot be retrieved.

Best Practice: it is probably prudent to save only the most critical versions. Multiple copies of large documents take up space on the FileMaker server and eventually will have an impact on performance.

▷Video Work Order Detail – Log Tab

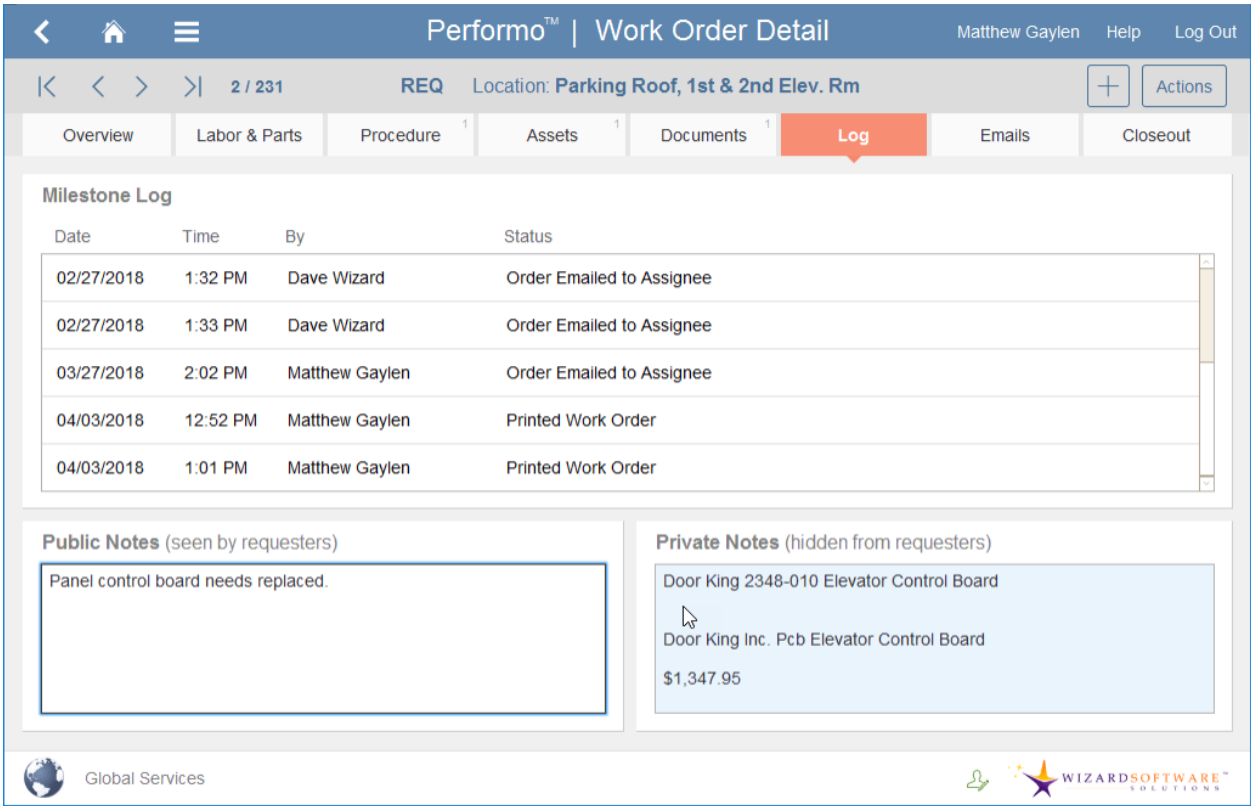


Figure 70 Log tab of the Work Order Detail view

1. Closed Out
2. Completed
3. Completed on Mobile Device
4. Hold
5. In Progress / Working
6. Marked DNC
7. Mobile Work Start
8. Mobile Work Stop
9. New Note on Mobile Device
10. New Order from PM
11. New Public Note on Mobile Device
12. On Hold
13. Order Emailed to Assignee
14. Order Emailed to Worker
15. Printed Work Order
16. Received Work Request
17. Received Work Request Call
18. Removed DNC
19. Request Denied
20. Request Un-denied
21. Requester Comment
22. Scheduled PM manually skipped
23. Scheduled PM skipped due to previous open work order <###>
24. Set to DNC
25. Survey Submitted
26. Work Order Completed
27. Work Order Created
28. Work Order Created From PM
29. Work Order Created on iOS/iPad
30. Work Order Created on iOS/iPhone
31. Work Order Created on Mobile Device
32. Work Order Created on WebDirect/Mac
33. Work Order Created on WebDirect/PC
34. Work Order Created on WindowsPC
35. Work Order Re-Assigned to <engineer name>
36. Work Order Re-Opened

Figure 69 Milestones Recorded

MILESTONE LOG – PUBLIC & PRIVATE NOTES

The Log tab of the Work Order Detail view displays the Milestone Log, Public Notes, and Private notes.

The Milestone log displays Date, Time, By, and Status.

Public and Private notes may be entered by the work order admin or the field engineer; the difference being that private notes are only viewable on the work order by field engineers and work order admins.

▷Video [Work Order Detail – Emails Tab]

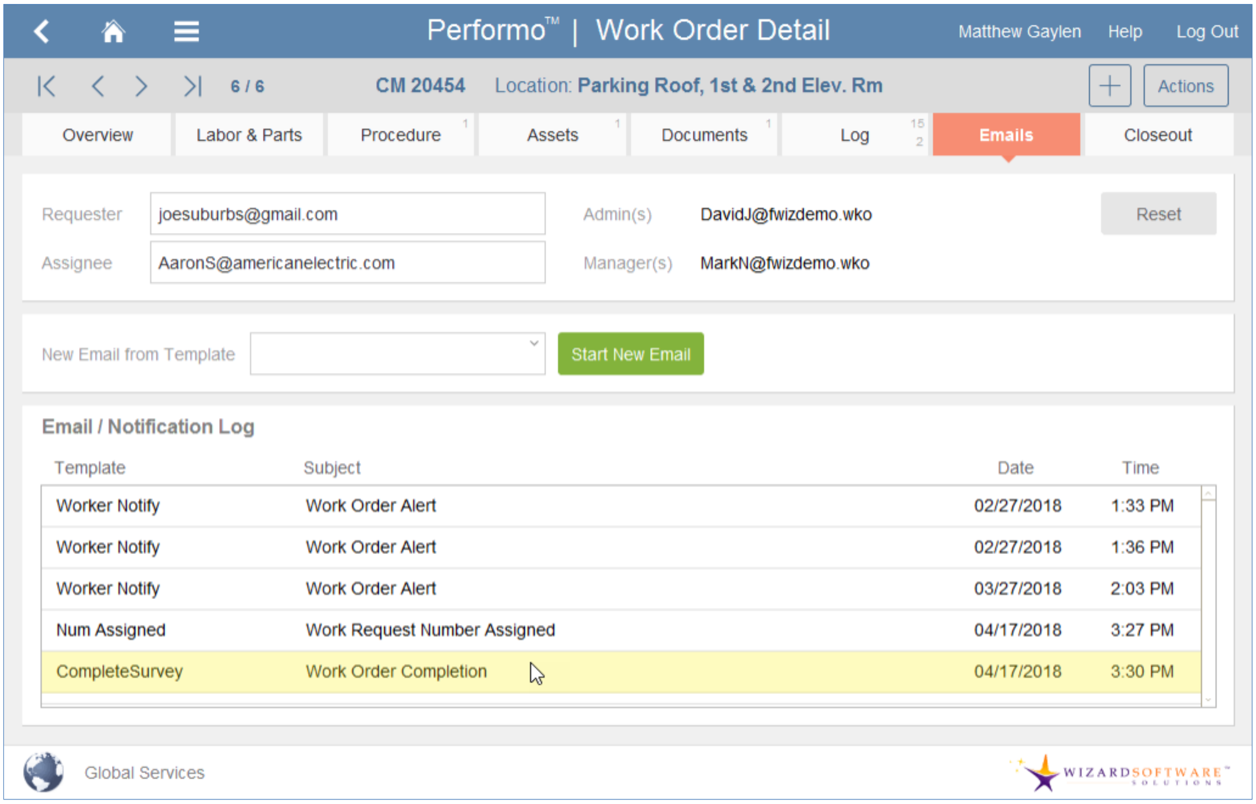


Figure 71 Email Messages

Email message notifications are configured to be sent automatically at work order milestones. When Performo sends an email notification an entry is made in the Email/Notification portal. Click any of the Email notification records to view the content of the message.

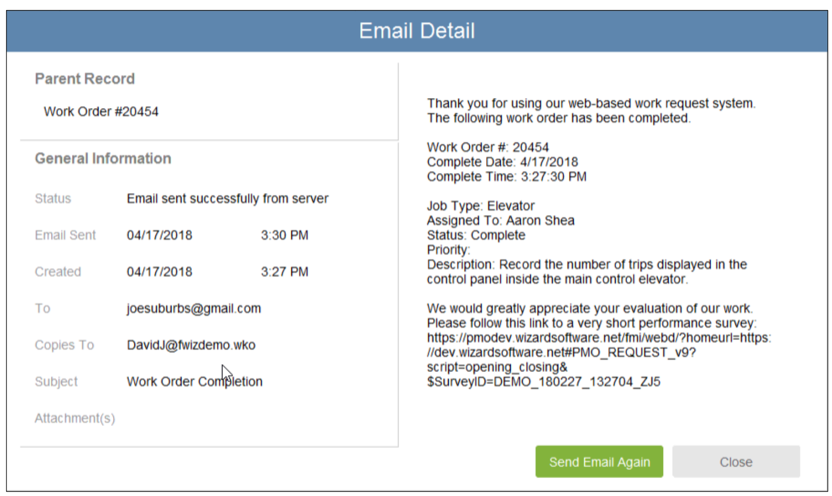


Figure 72 Email Message Details

The Solution Admin configures email content and designates recipients for each milestone.

Send Email Again Click the **SEND EMAIL AGAIN** button. Performo dispatches the message to the recipients.

START NEW EMAIL MESSAGE

In Performo, work order admins can also generate an email message manually.

Choose a value from the *New Email From Template* value list. Under the hood, Performo adds previously designated recipients and content to the message. The Solution Admin designates recipients and body content.

Click the **START NEW EMAIL** button. Performo displays the Prepare Email data entry window.

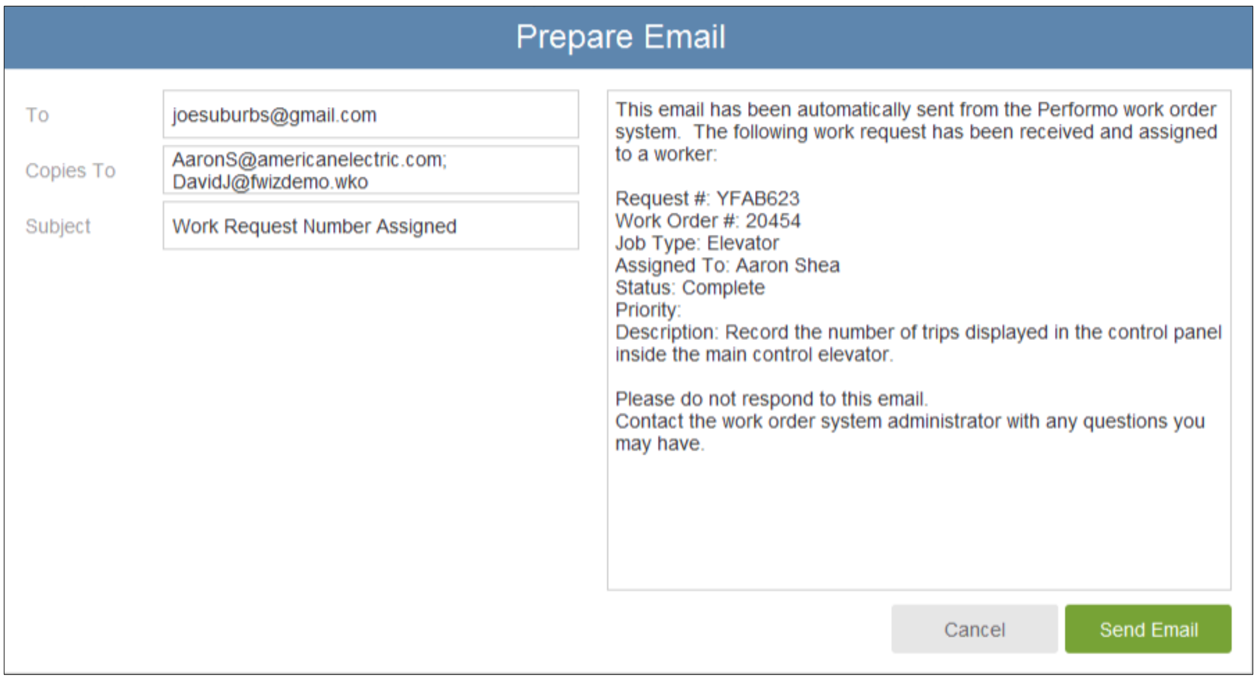
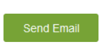


Figure 73 Prepare Email Message Data Entry Window

The To field, Copies To field, Subject field, and the content of the email message are all user-definable. Click to put the cursor in the field to enter new data or edit existing info. Choose the **BLANK** template from the *New Email From Template* value list to start from scratch. When the Blank template is chosen; users must enter data in the To field, Copies To field, Subject field, and the content of the email message.



Click the **SEND EMAIL** message button. Performo sends the email message to the recipients and makes an entry in the log.

▷Video **Work Order Detail – Closeout Tab**

After the work order has been completed, an email message is sent to the recipient. Click the link in the email message, or paste it into a browser URL field.

Click the Closeout tab to view the results of the survey.

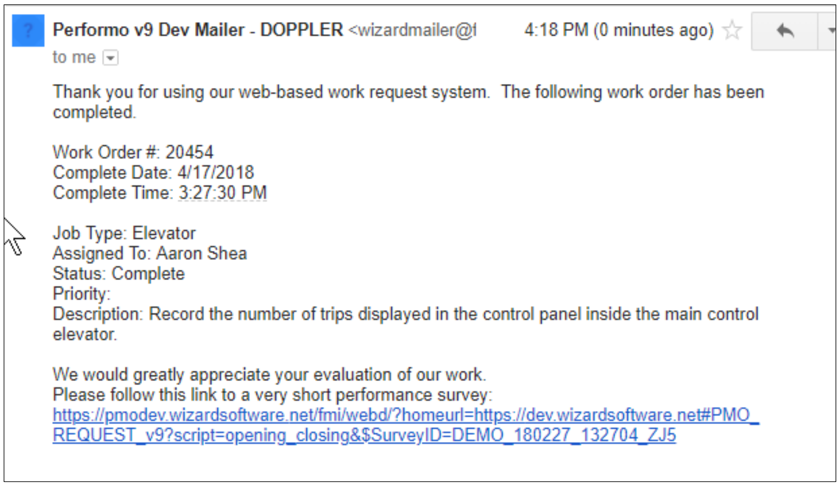


Figure 74 Work Order Survey REQ

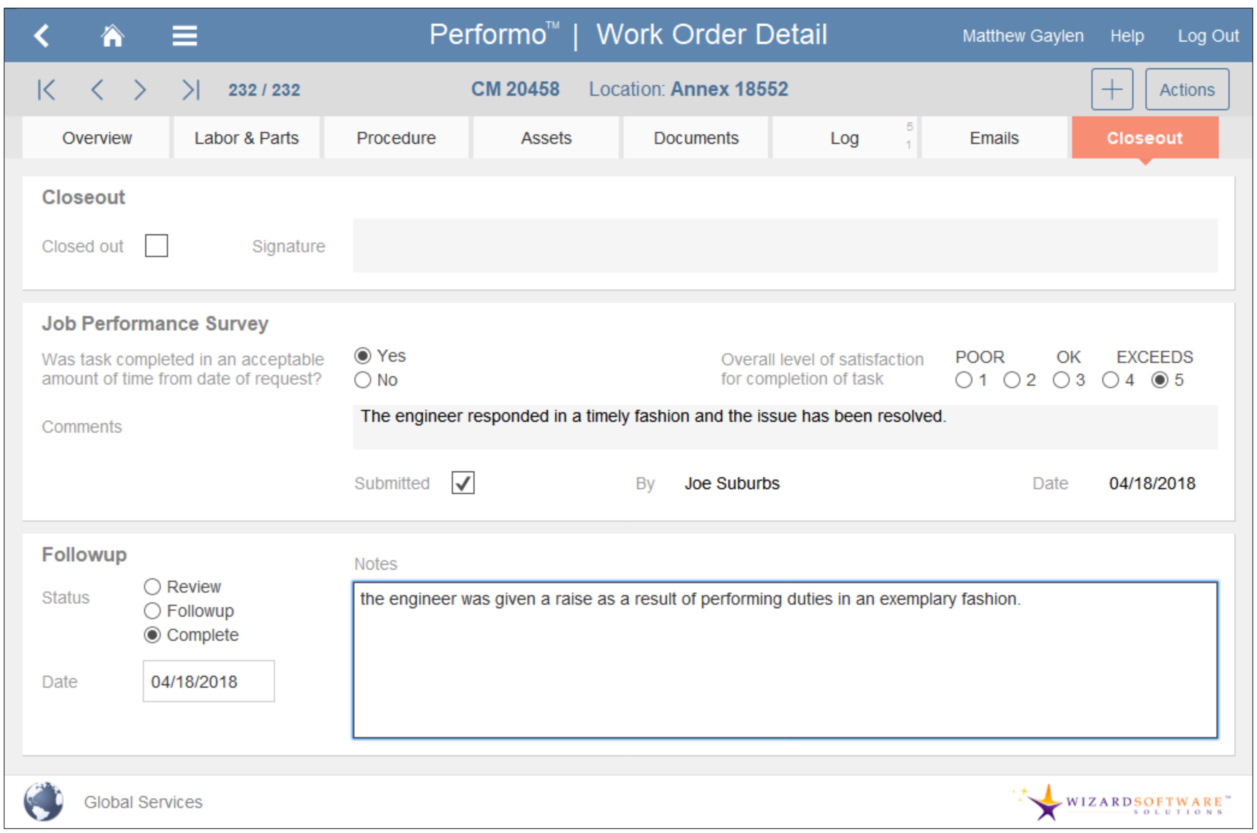


Figure 75 Work Order Detail - Closeout Tab

The requester fills out the Job Performance Survey section. The work order admin handles the section for Follow-up. Click the radio button for **REVIEW**, or **FOLLOWUP**, or **COMPLETE**. Choose a date for Review, Follow-up, or Complete.

COMPLETING A WORK ORDER

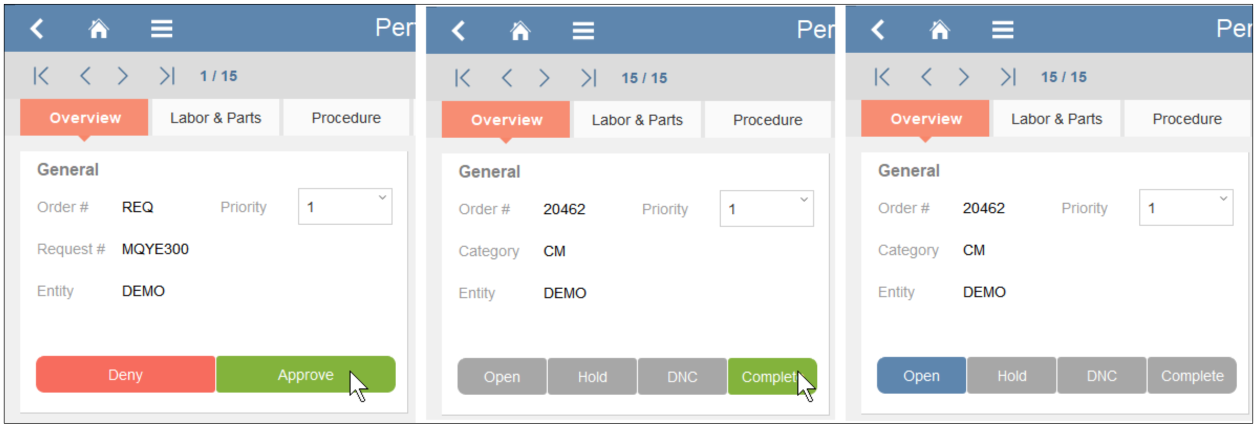


Figure 76 Stages of a Work Order

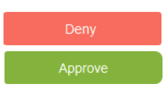
Stage 1: REQ received

Order # = REQ. REQ is short for *request*.

Rhymes with *wreck*.

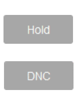
May also be pronounced: *Are Ee Queue*.

Stage 1a: There must be an assignee. Click the **THREE-DOTS** button to open the Assign Worker data entry window. Or click the **ASSIGNEE** field to view the Worker/Vendor value list. Note this process may be automated by the Solution Admin and the project implementation team during system setup.



Stage 2: Deny or Approve

Click the green **APPROVE** button. Approved work orders are assigned the next unique work order number.



Stage 3: Engineer Completes Work Order

The engineer can do this in the field; or the work order admin can do it in the office. Click the green **COMPLETE** button. Alternatively, click **HOLD** or **DNC**. DNC stands for Did Not Complete.

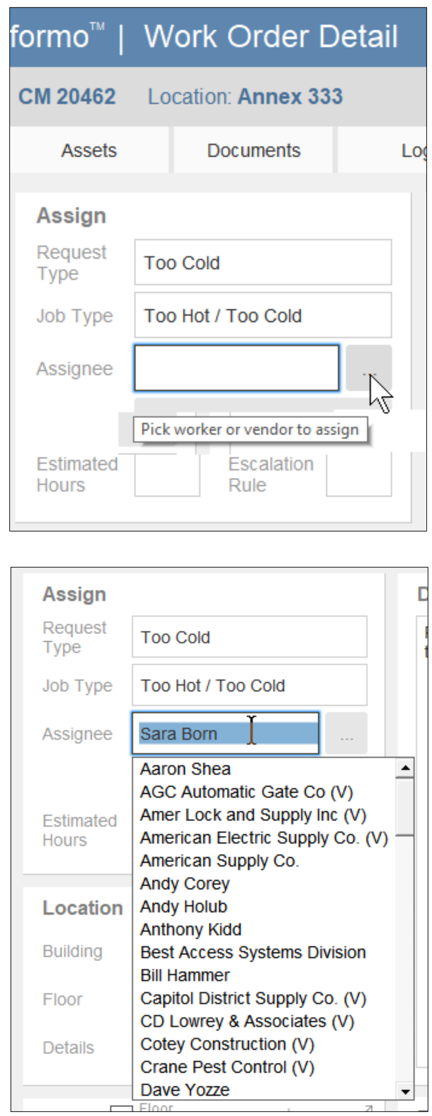


Figure 77 Assignee Selection Process

PRINT A BATCH OF WORK ORDERS

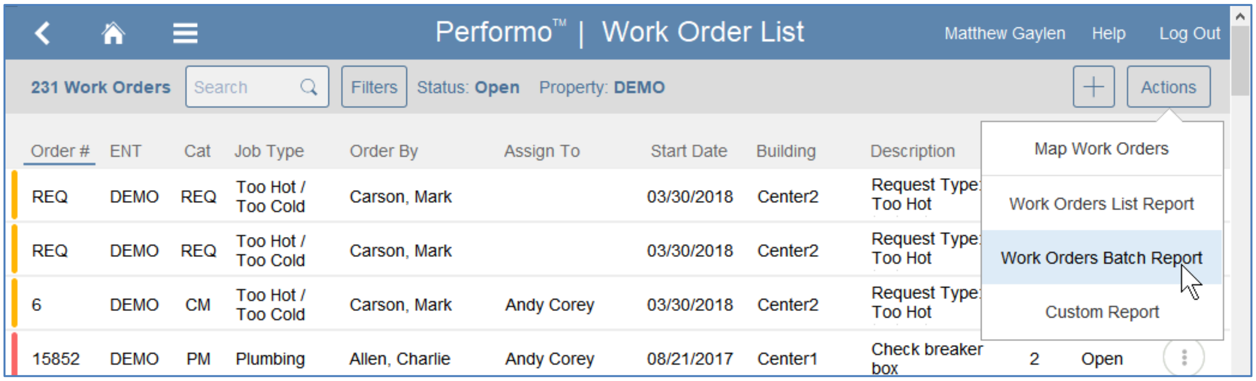


Figure 78 Print Batch / Work Order List View

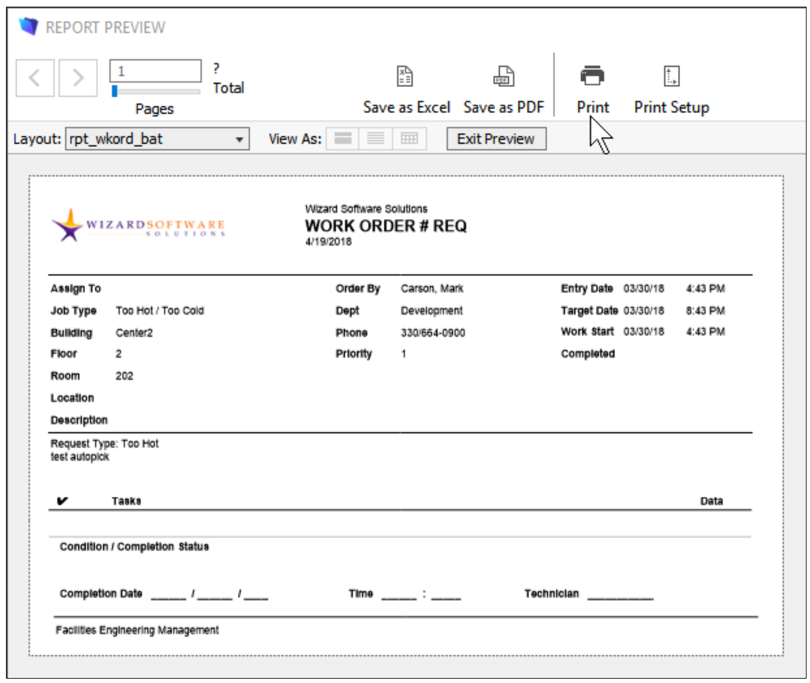
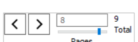


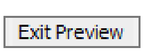
Figure 79 Batch of Work Orders Queued for Printing

When navigating to the Work Order module, the default list view is *open work orders* and *REQs*. The work order admin can then approve or deny REQs. Click the **ACTIONS** button on the Actions bar to view options for the found set. Click the **WORK ORDERS BATCH REPORT** option. Performo displays the first page of the batch in Preview Mode.



Click the Arrow buttons to view the next or previous work order. Use the slider to advance to any individual record or the last record in the found set.

Click the Save as **PDF** button or the **PRINT** button to proceed. Performo saves all the work orders in one PDF file or prints one page for each order in the found set.



Click the **EXIT PREVIEW** button to return to the found set of work orders.

Master Procedures

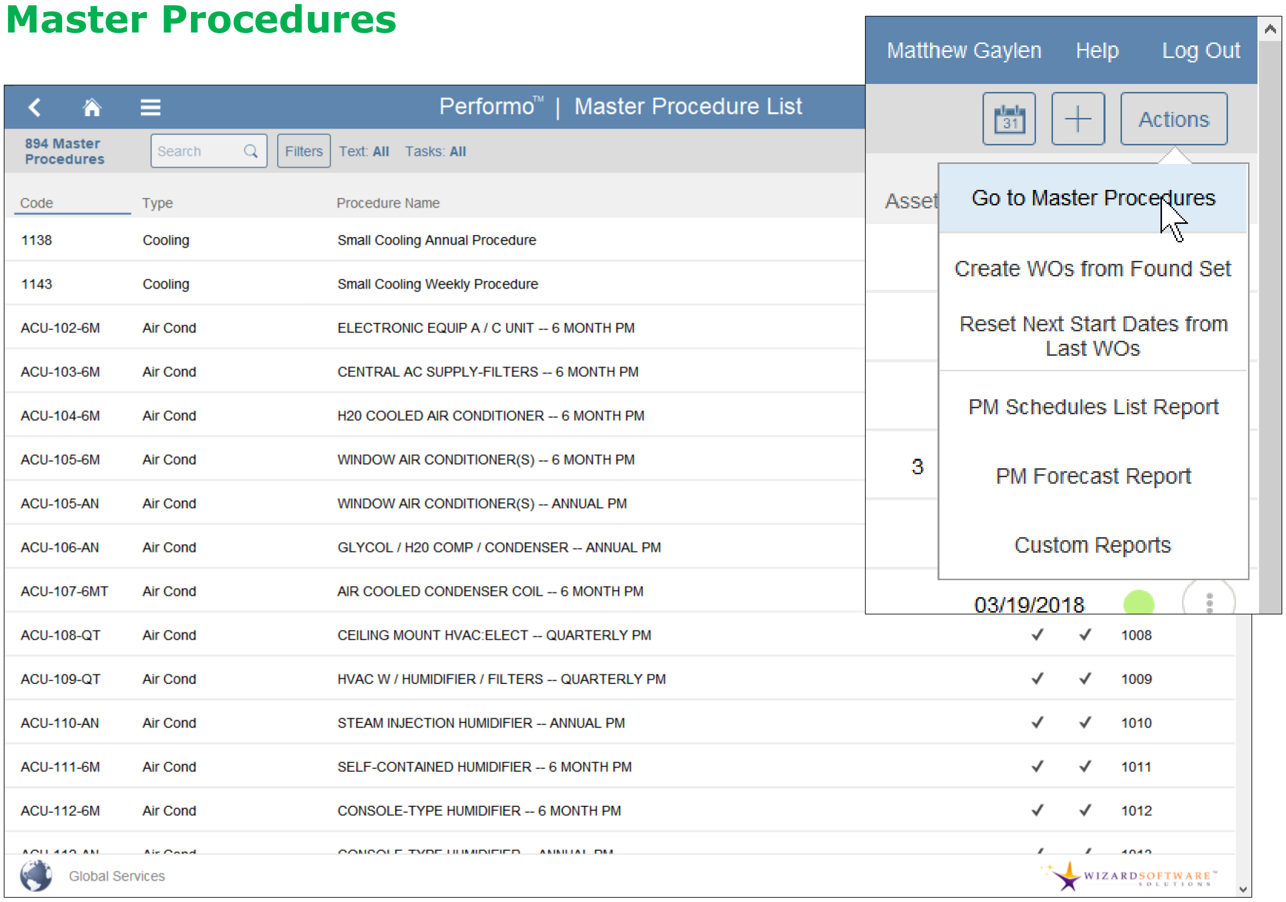
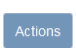


Figure 80 Go to Master Procedures

MASTER PROCEDURES LIST VIEW

A Master Procedure is a template. Procedures can be asset-related or not. A Master Procedure may contain text, task steps, and, or, meter readings. Master Procedures are used on preventive maintenance and corrective maintenance work orders. Master procedures may also be attached to assets for use on subsequently created work orders.



To create, edit, and manage Master Procedures click the **ACTIONS MENU** button in the Preventive Maintenance Schedules module. Click **GO TO MASTER PROCEDURES** to view the list. Note that setting up and scheduling preventive maintenance will be covered in a subsequent section of this user reference guide.

The Master Procedure list view displays sample records that come with the off-the-shelf version of Performo. These can be used as is, modified, or deleted. Use the global search or click the **FILTERS** button to find and display the procedures that need to be investigated, analyzed or managed. Click anywhere on the item to view the detail.

Click the **+** button on the Actions bar to create a new procedure.

+

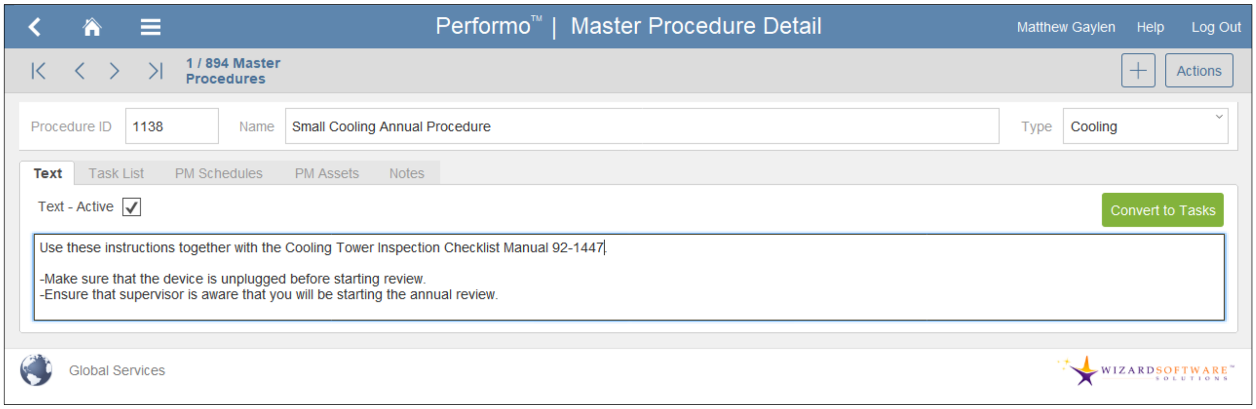


Figure 81 Master Procedure Detail > Text Tab

MASTER PROCEDURE DETAIL > TEXT TAB

Navigation to the Master Procedure Detail view always lands on the Text tab first.

+

Click the **+** button on the Actions bar. Performo automatically displays a blank Master Procedure detail record.

Text - Active ☑

Any guidance, directions, or tips may be entered. Click the **TEXT - ACTIVE** checkbox. The procedure is now set up. What happens is 1) the Master Procedure is chosen on the work order or asset. And then, 2) the data from the template appears on the work order when it is printed or viewed on a device in the field. Note: in the case of a Master Procedure attached to an asset, the data from the template appears on the work order when the asset is attached to the work order.

Procedure ID 1138

Procedure ID numbers are user-definable. However, the next number is automatically assigned and displayed. This ensures that each master procedure has a unique ID. Click to place the cursor in the field to enter a unique value.

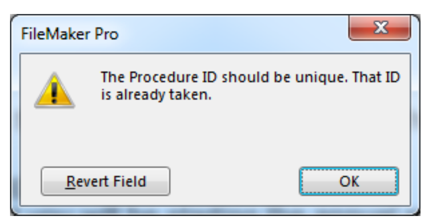


Figure 82 Procedure ID Must Be Unique

MASTER PROCEDURE SYSTEM TYPE VALUE LIST

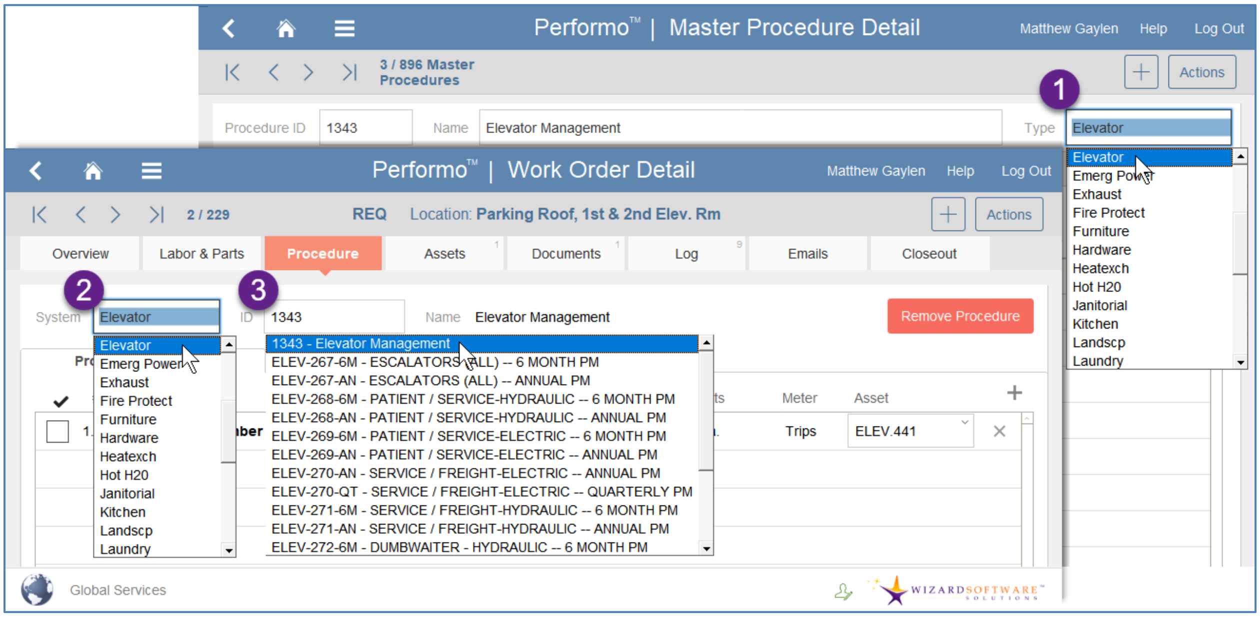


Figure 83 Master Procedure System Type Value List as shown also on the Work Order Detail view

1) On the **Master Procedure Detail** view, the Type is user-definable. The value list displays previously entered items. Choose a value from the list, or click a second time to put the cursor in the field to create a new entry or to edit an existing selection*.

   *Editing an existing selection does not change any previously entered records.

   Henceforth, the master procedure appears when that type is selected. The value list appears in the Work Order detail view and the PM Schedule detail view.

2) On the **Work Order Detail** view, choose from the System value list.

3) The ID field displays only the Master Procedures realted to that System.

This type of calculated value list is an example of using one value list to calculate or narrow down the options that appear in a subsequent value list. The procedure for choosing Master Procedures is replicated in the PM Schedules module.

CONVERT TO TASKS

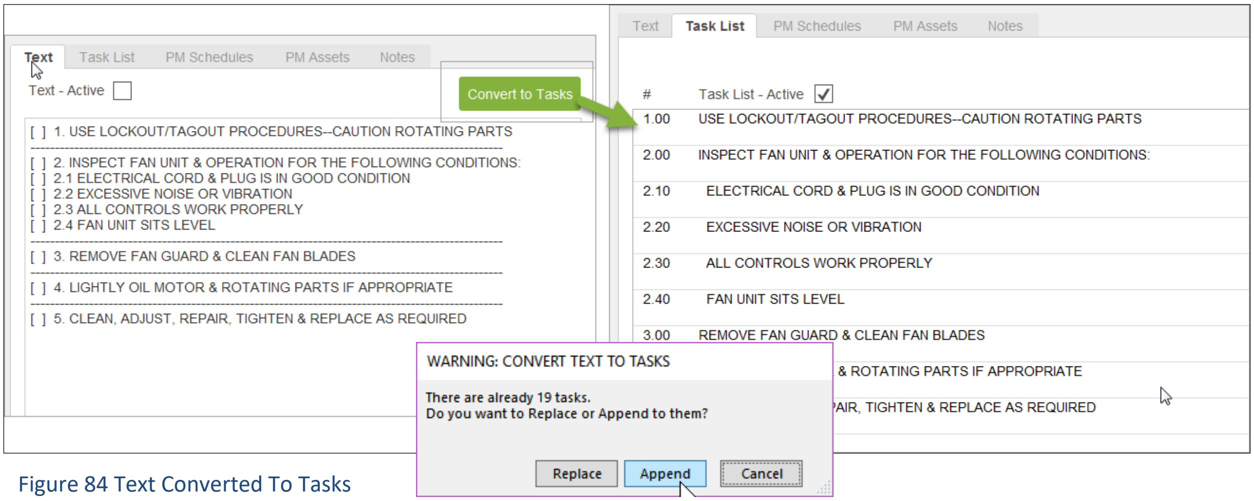


Figure 84 Text Converted To Tasks

Optionally, click the green **CONVERT TO TASKS** button. Choices for converting text to tasks include *replace, append,* and *cancel.* Click the **APPEND** button. If the items are not already numbered, then Performo adds the items to the bottom of the list in 0.01 increments. However, remember that these values are user-definable. Click to place the cursor in the # field. Edit the number as needed. Note that blank lines in the Text field are counted, but not displayed.

On work orders, each item appears with a checkbox. The checkbox is used in the field to track step completion.

▷Video

MASTER PROCEDURE DETAIL > TASK LIST TAB

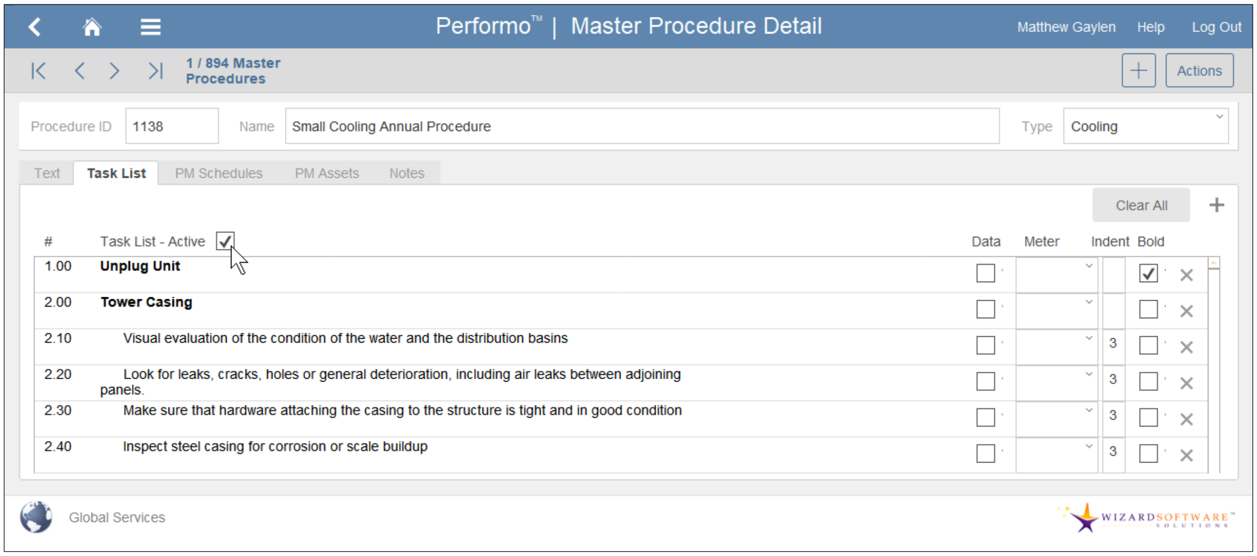


Figure 85 Master Procedure Detail > Task List Tab

The Task List tab of the Master Procedure Detail view contains the to-do list.
Click the **TASK LIST** tab. Performo displays the Task List portal. Click the **TASK LIST - ACTIVE** checkbox to display the task list when the procedure is added to a preventive or corrective maintenance work order.

Click the **+** button. Performo automatically places a blank line in the portal. Data entry may begin immediately. Enter a number in the first column. The Task List item number is used to sort the list. Any number may be used with or without decimals.

Enter a description for the task step.

Click the checkbox in the data column to display a field for data entry on a work order.

Click the **METER** field to view the data type value list for the meter reading.

Enter a number in the Indent field. Performo will indent the task list item the number of spaces specified. This is useful to nest ‘child’ steps under ‘parent’ steps.

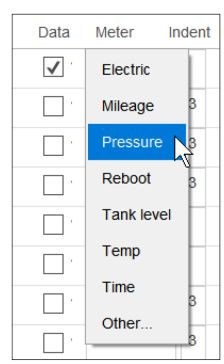


Figure 86 Meters

ADDITIONAL TASK LIST DATA ENTRY

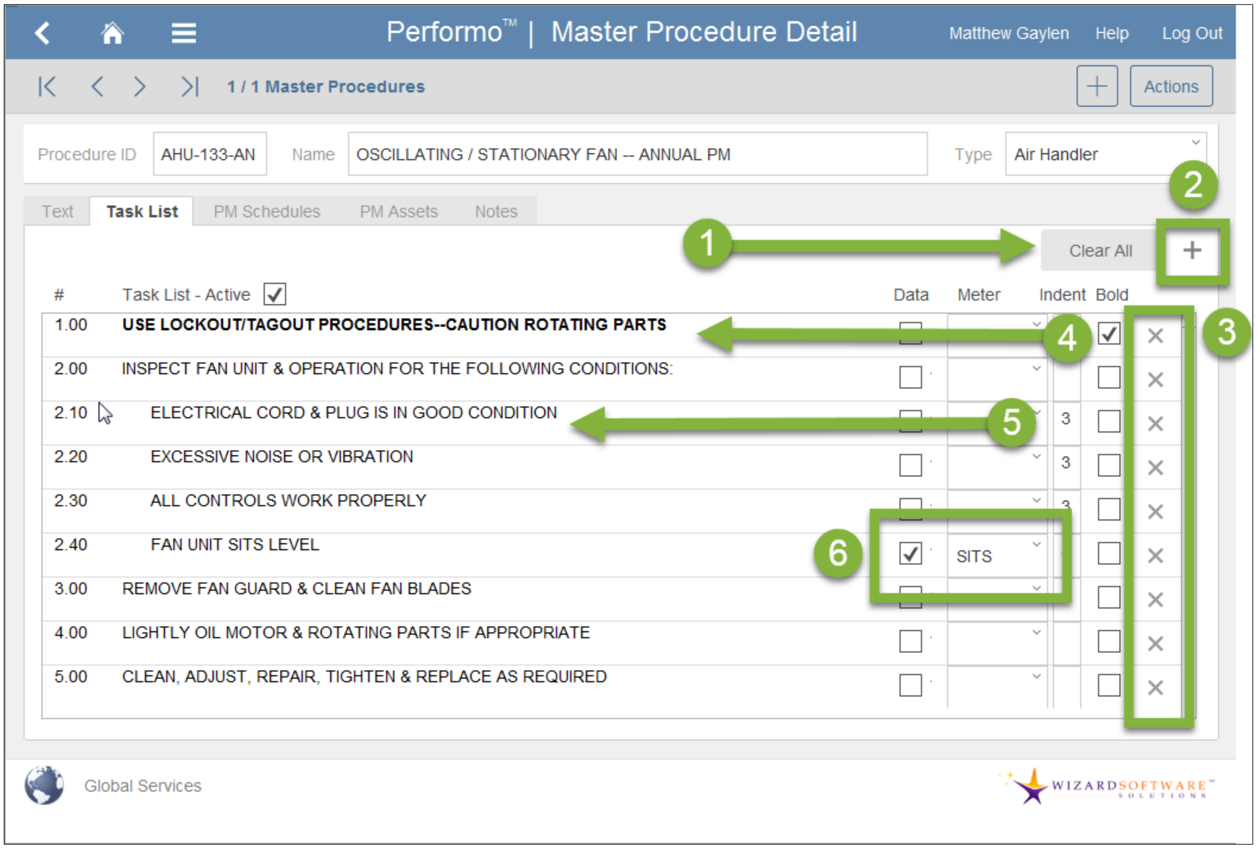


Figure 87 Setting up Task List Steps for Display on Work Orders

1) Click to clear all task list steps. No undo.

2) Click to add a new task list step.

3) Click to remove the task list step. No undo.

4) Click to make the task list step bold.

5) Click to put the cursor in the field. Enter a specific number of spaces to indent the step. Useful for nesting *child* steps under *parent* steps.

6) Click to add a meter reading to the task list step. And. Click to require that data be added to the meter reading for that task list step. This will appear on the work order whether it is displayed on a preventive maintenance work order or a corrective maintenance work order.

ADD A PROCEDURE TO A WORK ORDER

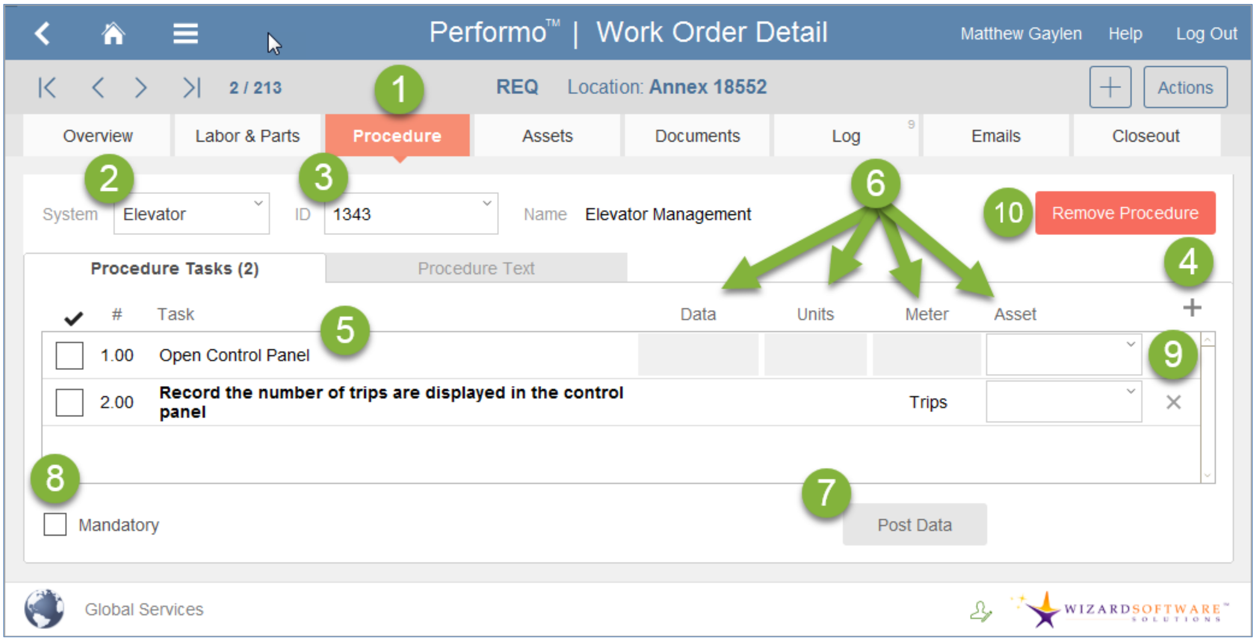


Figure 88 Add A Procedure To A Work Order

1) Click the **PROCEDURE** button on any Work Order Detail screen.
2) Choose an option from the System value list.
3) Once a System is selected in step #2, then, a Master Procedure from that system can be selected in the ID field.
4) Click the + button to create a blank line in the Procedure Tasks portal.
5) Edit the Task step number if necessary, and then create a name.
6) If an asset is chosen, then meters attached to that asset will appear in the Meter value list. Choose a unit. Data is collected in the field by the engineer, custodian or worker.
   a. If an asset is not selected, the task step can still have a meter reading.
   b. Enter a meter name and units… Data will be collected in the field.
   c. If there is no meter reading, the task step can still be checked off using the checkbox on the far left of the row (step #8).
7) Click the **POST DATA** button to transfer the Data recorded on the Meter. Performo posts the data to the corresponding record in the Asset module.
8) Click the **MANDATORY** checkbox to require the engineer to check the box prior to completing the work order.
9) Click the x to the right of the row to delete that task step.
10) Click the **REMOVE PROCEDURE** button to delete the entire process from the work order.

The process is the same in the PM Schedule module.

PROCEDURE DISPLAYED ON WORK ORDER

When a procedure is copied from a template to a work order there will be 1) a checkbox, 2) a place to enter data if the task requires a meter reading, and 3) the standard completion information.

Figure 89 Procedure displayed on a work order

Click the checkbox on the work order to indicate that the item was addressed. If this is taken care of on a paper copy, then the work order admin will have to 1) manually click the checkbox on the work order in Performo and 2) manually enter the data on screen.

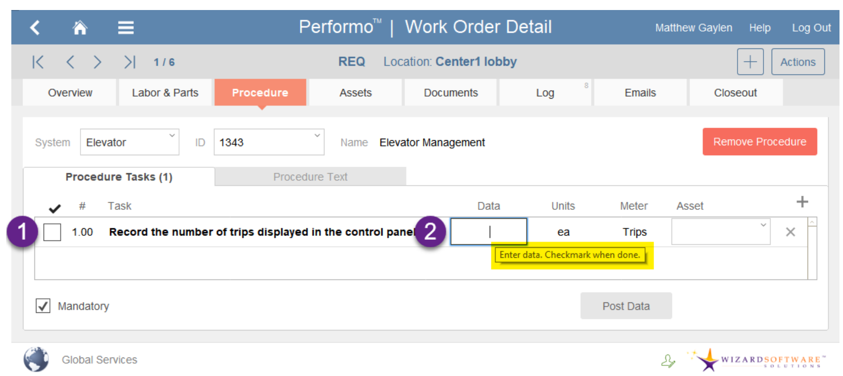


Figure 90 Completing the Tasks on a Work Order

ACTIONS OPTIONS FOR MASTER PROCEDURES

On the Master Procedure screen, the Actions menu includes two choices: 1) Delete Procedure, and 2) Procedure Sheet Report.

Navigation note: Click the **BACK** button in the upper, left-hand corner of the screen to navigate to the Master Procedure list view.

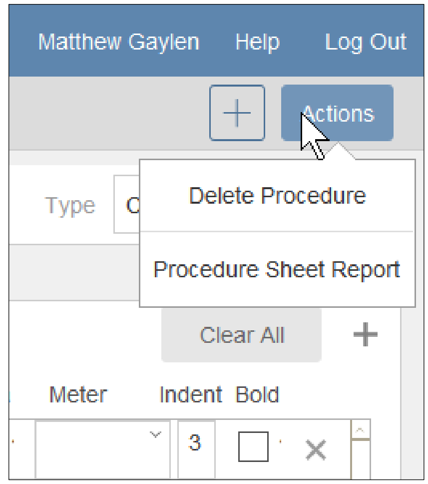
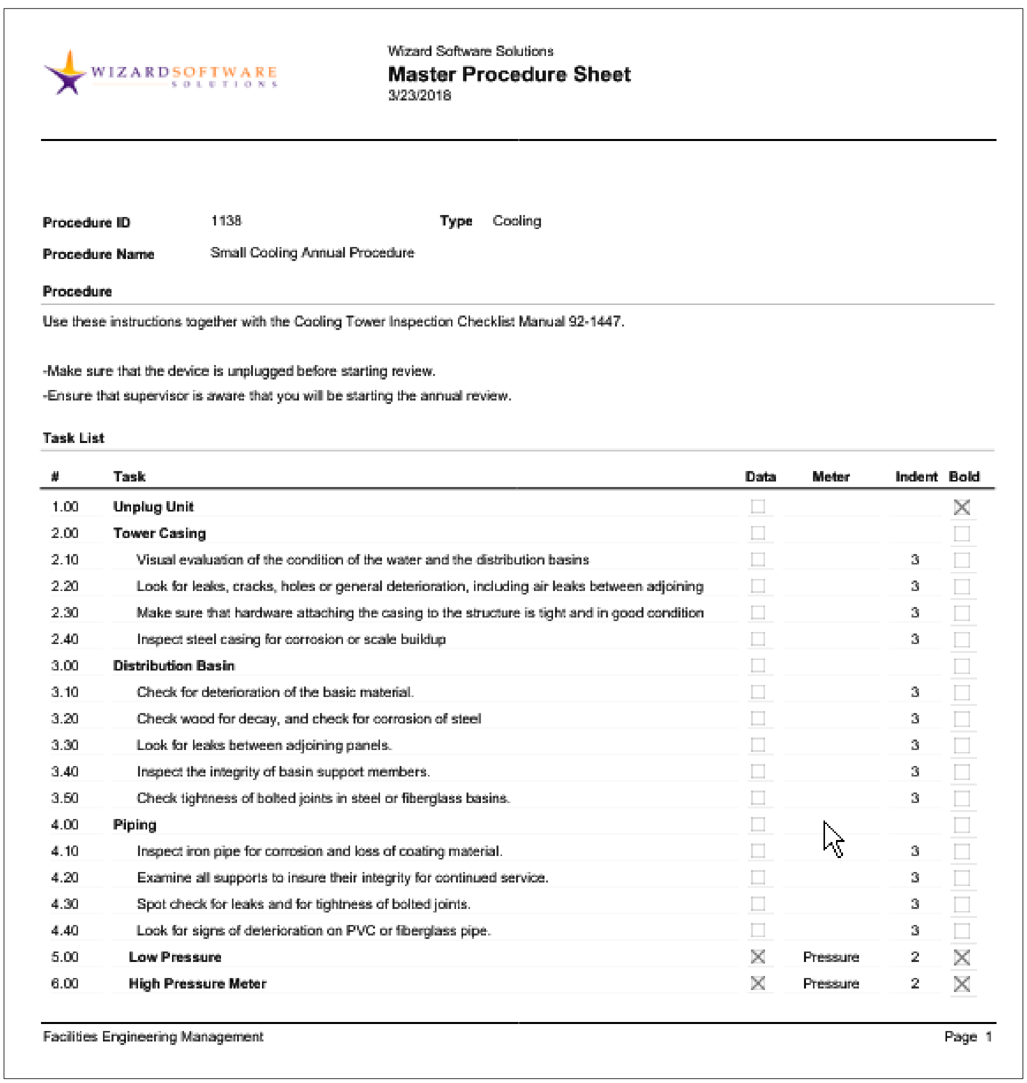


Figure 91 Master Actions Menu

PROCEDURE SHEET REPORT – AKA MASTER PROCEDURE SHEET



Wizard Software Solutions

Master Procedure Sheet

3/23/2018

Procedure ID 1138 **Type** Cooling

Procedure Name Small Cooling Annual Procedure

Procedure

Use these instructions together with the Cooling Tower Inspection Checklist Manual 92-1447.

-Make sure that the device is unplugged before starting review.
-Ensure that supervisor is aware that you will be starting the annual review.

Task List

#	Task	Data	Meter	Indent	Bold
1.00	**Unplug Unit**	☐			☒
2.00	**Tower Casing**	☐			☐
2.10	Visual evaluation of the condition of the water and the distribution basins	☐		3	☐
2.20	Look for leaks, cracks, holes or general deterioration, including air leaks between adjoining	☐		3	☐
2.30	Make sure that hardware attaching the casing to the structure is tight and in good condition	☐		3	☐
2.40	Inspect steel casing for corrosion or scale buildup	☐		3	☐
3.00	**Distribution Basin**	☐			☐
3.10	Check for deterioration of the basic material.	☐		3	☐
3.20	Check wood for decay, and check for corrosion of steel	☐		3	☐
3.30	Look for leaks between adjoining panels.	☐		3	☐
3.40	Inspect the integrity of basin support members.	☐		3	☐
3.50	Check tightness of bolted joints in steel or fiberglass basins.	☐		3	☐
4.00	**Piping**	☐			☐
4.10	Inspect iron pipe for corrosion and loss of coating material.	☐		3	☐
4.20	Examine all supports to insure their integrity for continued service.	☐		3	☐
4.30	Spot check for leaks and for tightness of bolted joints.	☐		3	☐
4.40	Look for signs of deterioration on PVC or fiberglass pipe.	☐		3	☐
5.00	**Low Pressure**	☒	Pressure	2	☒
6.00	**High Pressure Meter**	☒	Pressure	2	☒

Facilities Engineering Management Page 1

Figure 92 Master Procedure Sheet

Meters

▷Video [METER READING SET UP: PART I – NAVIGATING TO THE ASSETS MODULE]

A separate, distinct type of a Master Procedure task step is a meter reading. Meter readings can be virtual, ad hoc, or tied to an asset. Meter readings allow companies, corporations, and institutions to monitor gauges, pumps, usage, flow etc.

To tie a meter to an asset; step one is to navigate to an asset. Step two is to add the meter to the asset.

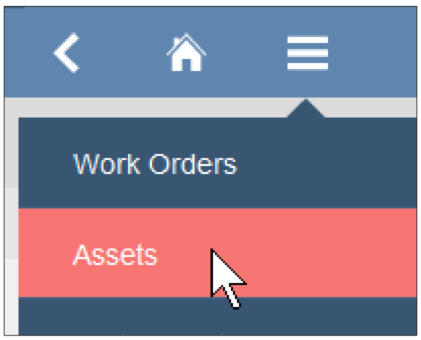


Figure 93 Assets Module

There are a couple of ways to navigate to the Assets module to begin setting up meter readings.

Option 1: From the Main Menu of the Home Screen, click the **ASSETS** button.

Option 2: Click the **NAVIGATION MENU** button on any screen and choose the **ASSETS** module.

Option 3: From within any portal in any other module where an asset is displayed, click anywhere on the record to view the detail in the Assets module.

▷Video **METER READING SET UP: PART II – METERS TAB OF ASSET DETAIL**

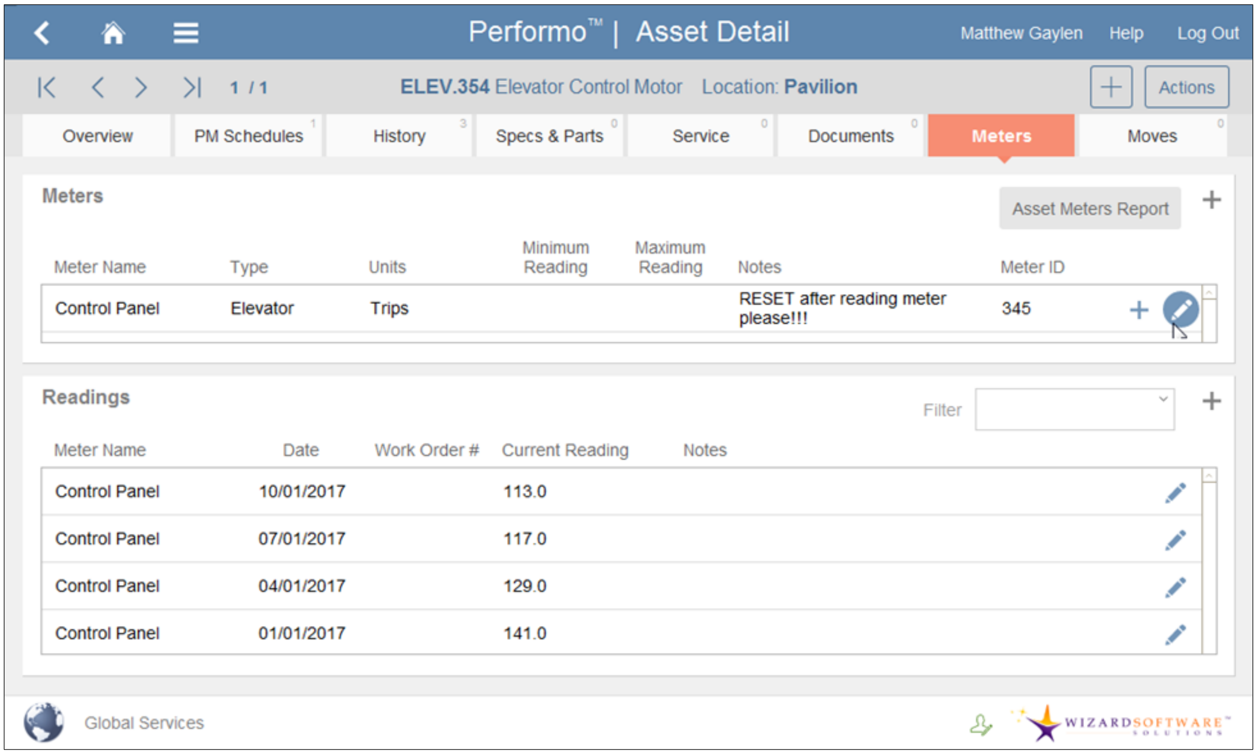


Figure 94 Meters, Assets & procedures

Click the **METERS** tab on the Asset Detail screen. The Meters tab of the Asset Detail screen displays a list of meters related to the asset, and the history of previous readings.

This screen also allows users to enter new meters and readings.

On each portal, click the **+** button to add another record. Adding a record to the Meter portal allows users to add a meter to the asset. Creating a record on the readings portal is for adding meter reading data.

The edit button appears in the shape of a pencil icon. Click the **PENCIL ICON**. Performo opens a data entry window. Click to place the cursor in any field to enter or edit data.

Delete Meter

The delete meter button is in the lower right-hand corner of the Edit Meter, and the Edit Meter Reading dialog boxes.

Setting up the meter on the asset allows meters readings to be connected to PMs and CMs.

METER READING SET UP: PART III – ADD METER & EDIT PARAMETERS

Click the **+** button on the Meters tab of the Asset Detail. Performo opens a data entry window. Begin by entering a Meter Name. The meter name is user definable.

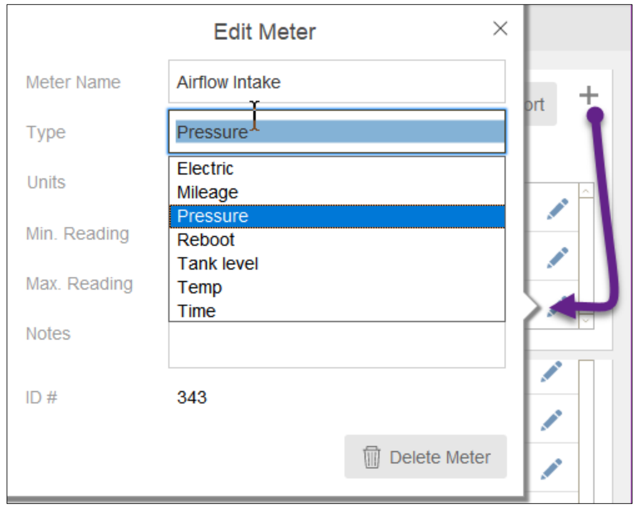


Figure 95 Edit Meter Data Entry Window

Choose a Type from the value list. Or click a second time on the field to enter data manually.

Click the **UNITS** field to choose Amps, Celsius, Fahrenheit, Gallons, Miles, Volts, etc. Click the **EDIT…** button to manage the value list. Remember that a hyphen (**-**) on a line by itself in the Edit… window creates a separator line between values. Changes made using Edit… dialog box affect every other user of Performo. Previously created records are not affected.

The Minimum Reading and the Maximum Reading are optional fields and will not be used for every meter. Notes is also optional but might include instructions about where to find or how to access the meter as well as warnings about out of range measurements.

At this point; the meter is set up and it can be added to CMs and PMs.

PICKING METERS HAVING BEEN ADDED TO ASSETS ON A WORK ORDER

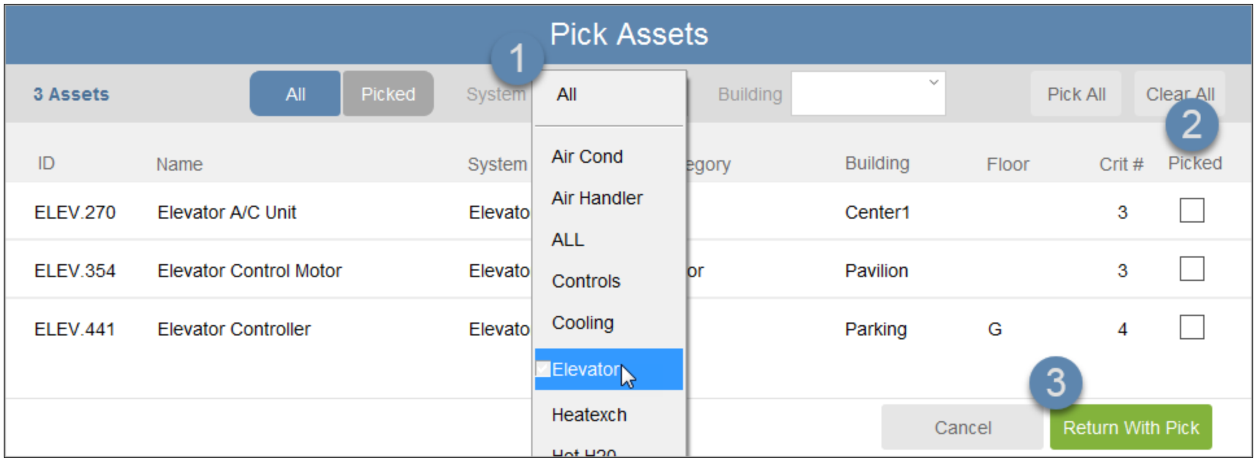


Figure 96 Pick Assets

After meter readings are added to assets, those assets can be added to work orders. **From the Assets tab of the work order**, click the PICK ASSETS button. Performo will automatically display the Pick Assets data entry window (Figure 98).

1) Click the System field to display the value list. Choose an option.

2) Click the PICKED checkbox for the assets that need to be added to the work order.

3) Click the RETURN WITH PICK button. Performo will add the asset to the work order, close the Pick Assets data entry window, and display the Assets tab of the Work Order Detail view.

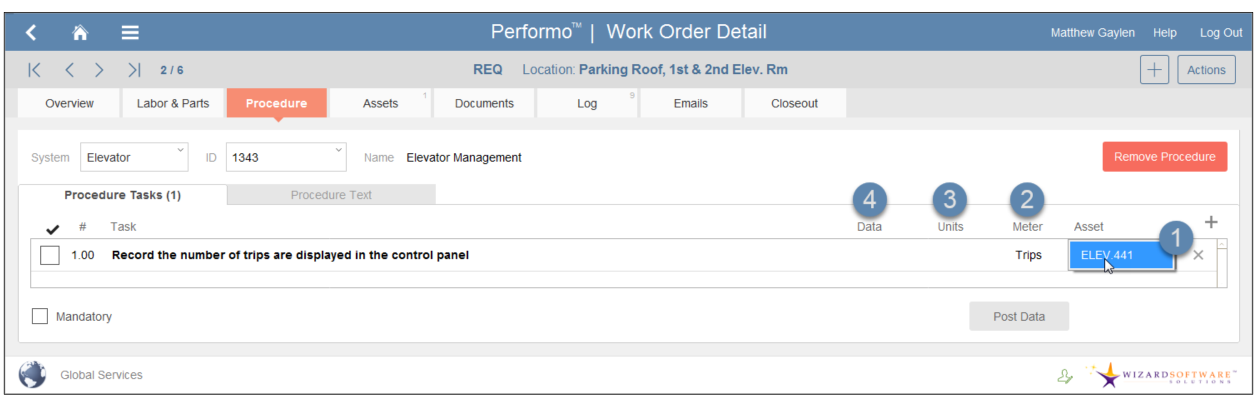


Figure 97 Asset added to Work Order

Click the PROCEDURE button. In the Procedure Tasks portal, 1) choose an asset first. Then 2) choose a meter and 3) units. 4) Data will be added in the field or when the work order is completed.

ADDING A VIRTUAL OR AD HOC METER READING TO A WORK ORDER

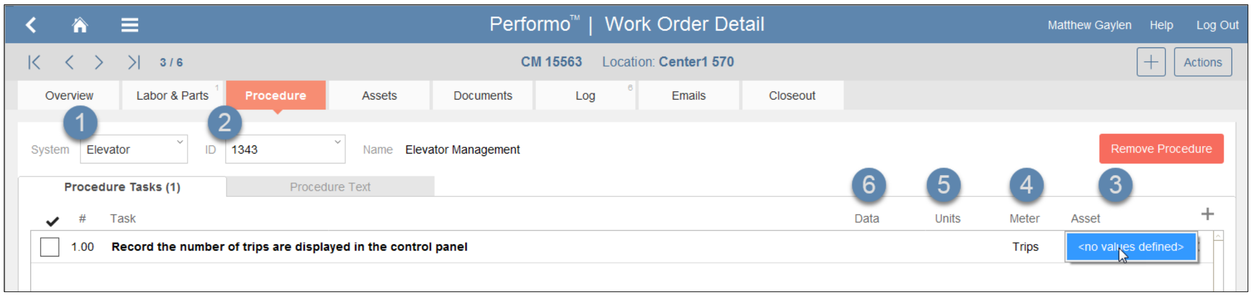


Figure 98 New Procedure Task Record + Completed Meter Readings

Click the **+** button above the task list portal. Performo automatically creates a blank line and places it in the task list portal.

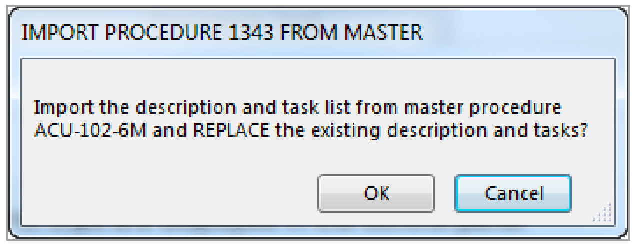


Figure 99 Import Procedure from Master

1) Choose a System – optional.
2) Choose and ID related to that system. Performo displays the Import Procedure <###> from Master dialog box. Choose OK or Cancel to proceed.
3) Since there is no asset… <No values defined> appears in the Asset value list.
4) Enter the name of the meter.
5) Enter the units required for the meter reading.
6) When complete, enter the Data from the meter reading.

The task # field is user-definable. Any number may be entered. The portal is automatically sorted by the # field.

Enter a task description. *Best Practice*: It is probably not necessary to enter task descriptions using all-caps.

Check the **DONE** checkbox in the first column to indicate that task has been completed.

Click the **X** on the right side of any row to permanently delete that record. Confirmation is required because there is no undo.

Click the **REMOVE PROCEDURE** button to remove all the steps at once.

Assets Module

The Assets module in Performo is used to track fixed and movable equipment such as air handlers, rooftop units, or anything that needs to be tracked, managed, and analyzed.

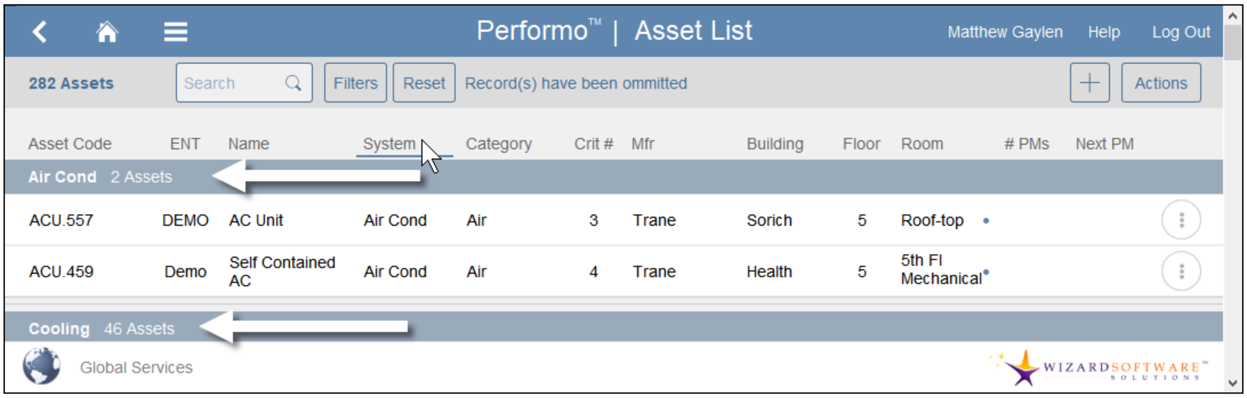


Figure 100 Asset List View

Asset List View

In the Asset List View, each row is one item. Each column is one detail about that item. Click the column heading to sort the list by that value. Where it makes sense, Performo will display sub summaries. Click on any row to view details about that item. Click the **ACTIONS** button to display a list of options for the items in the found set.

Click the **RECORD MENU** button (three vertical dots) to view the list of options. Omit a record to remove it from the found set. Omit does not delete.

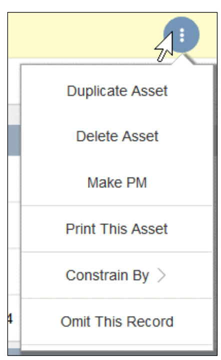


Figure 102 Record Menu

The Actions bar at the top of the screen displays the number of items in the found set, the global search field, the **FILTERS** button, reset button, as well as the **ADD NEW ITEM** button and the **ACTIONS** button.

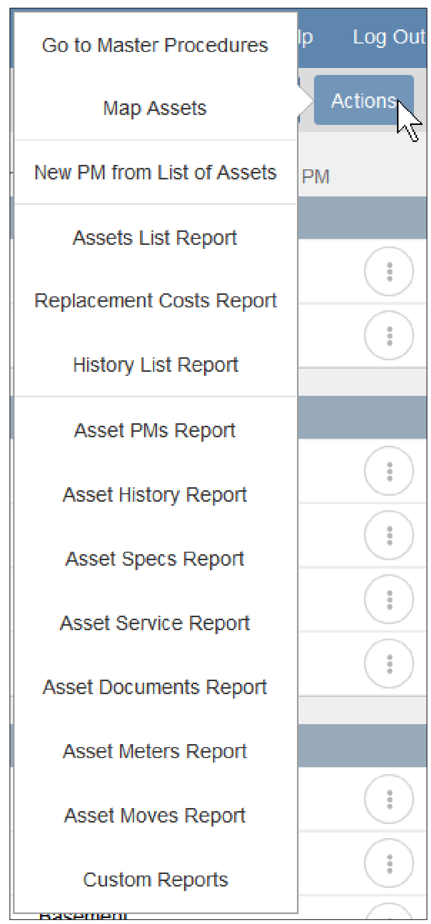


Figure 101 Actions Button – Assets Module

▷Video [Asset Detail View – Overview Tab]

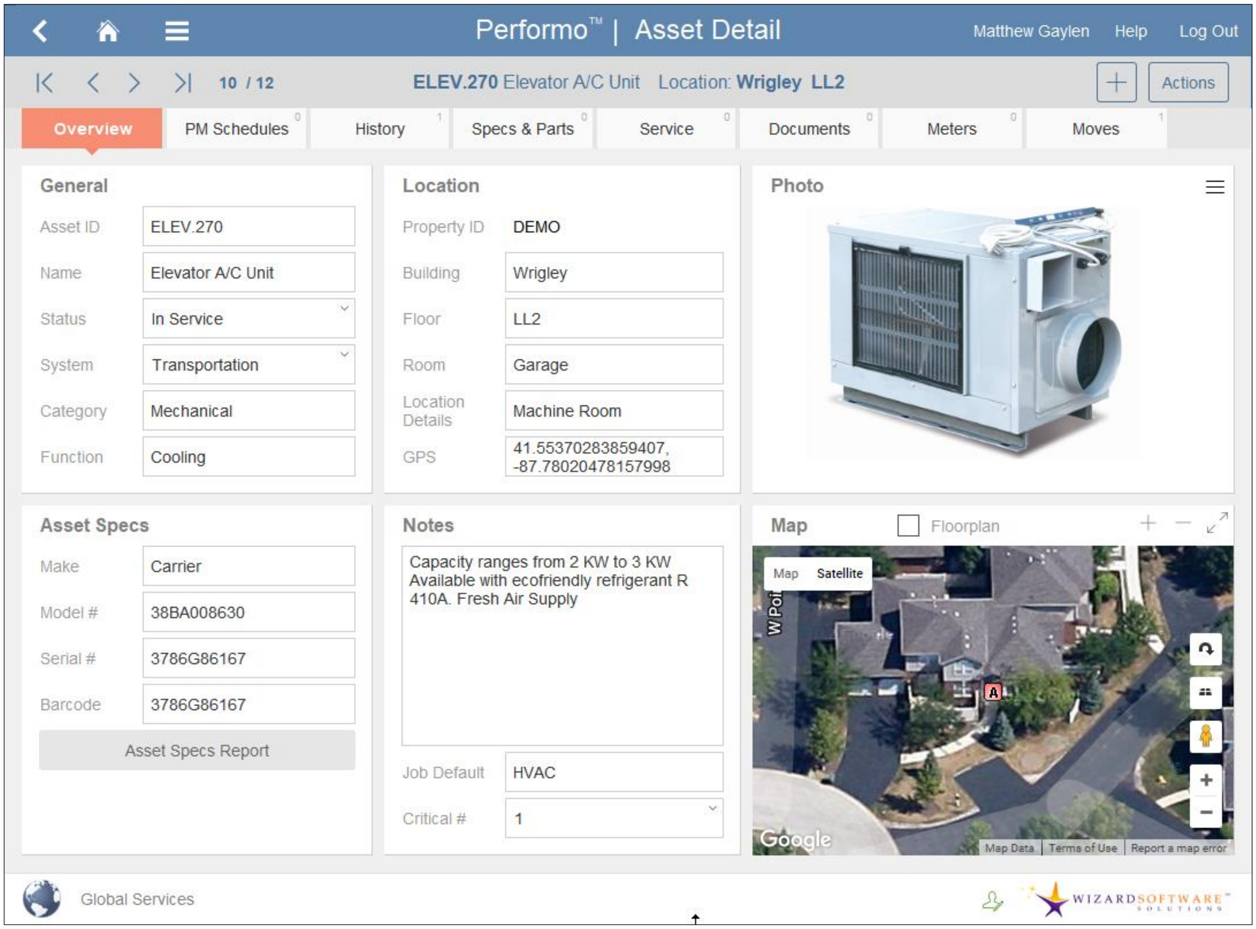


Figure 103 Asset Detail View

The Asset Detail Screen is divided into six sections. General, Asset Details, Location, Notes, Photo, and Map.

There are eight tabs for adding additional detail. Overview, PM Schedules, History, Specs & Parts, Service, Documents, Meters, and Moves.

The Actions bar displays buttons for navigating to the **FIRST, PREVIOUS, NEXT** and **LAST** records as well as the number of items in the found set.

The **ADD NEW ITEM** button and the **ACTIONS** button also appear on the Actions bar.

Control+click the Navigation menu on the Title bar to return to the found set in list view.

▷Video **ASSET DETAIL VIEW – OVERVIEW TAB**

The General section of the Asset overview is all about taxonomy. Performo displays fields for Asset ID, Name, Status, System, Category, and Function. Asset ID and Asset Name are user-definable text fields. Enter data as necessary. Each organization is empowered to define, describe and delineate assets as best suits their needs.

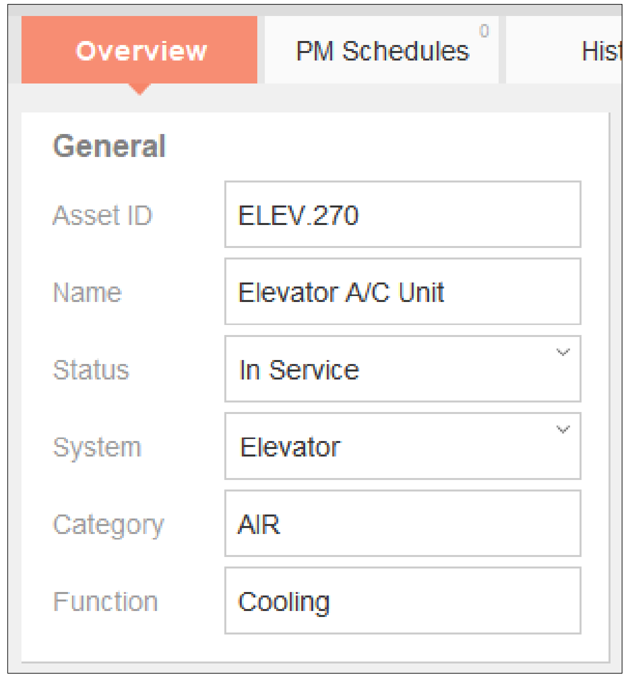


Figure 104 General Asset Info

Status, System, and Category value lists are used to track and manage assets. The Function field is user definable – any text may be entered. These fields can be used – or not used – in conjunction with each other to precisely organize assets. Click the **SYSTEM** field. Performo automatically displays the value list. Choose any item or click a second time to put the cursor into the field. Enter a new value or edit the existing value as necessary. The System field is configured so that when new items are entered, they are automatically added to the value list for future use.

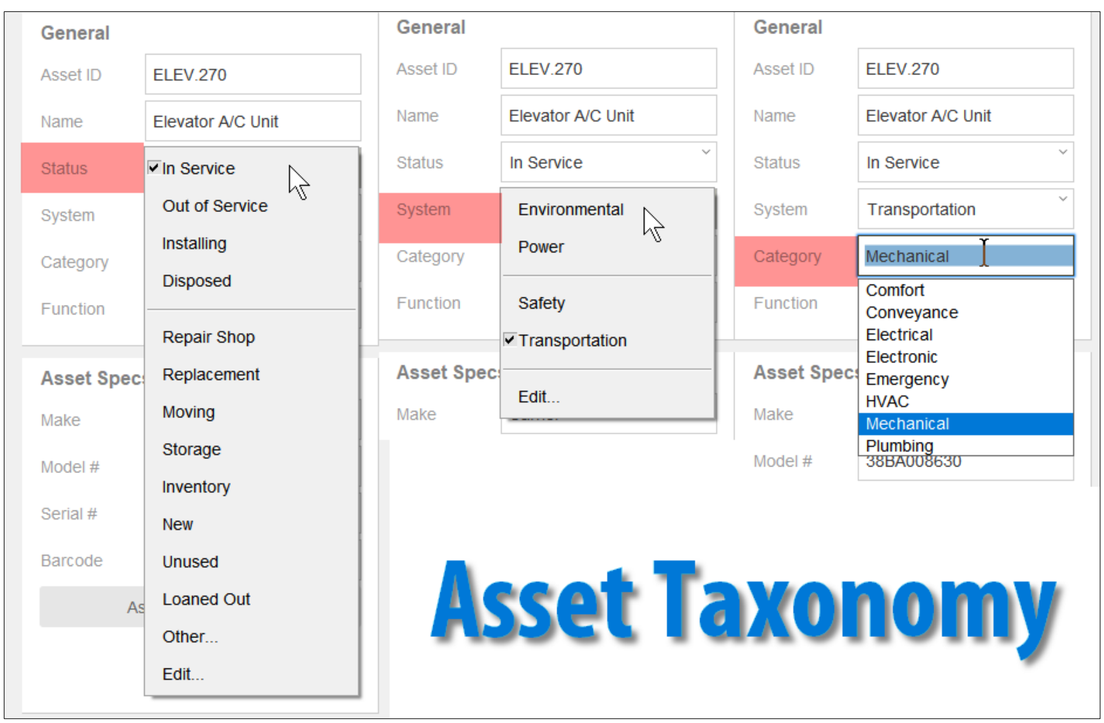


Figure 105 Asset Detail Status, System, and Category value lists

ASSET SPECS

The Asset Specifications section displays details about Make, Model Number, Serial Number, and Barcode.

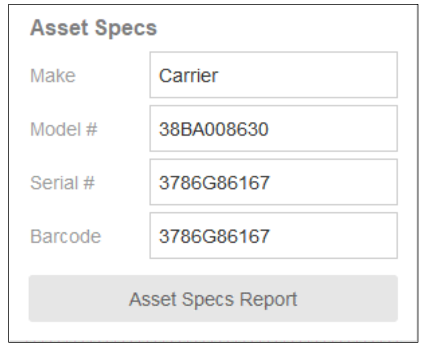
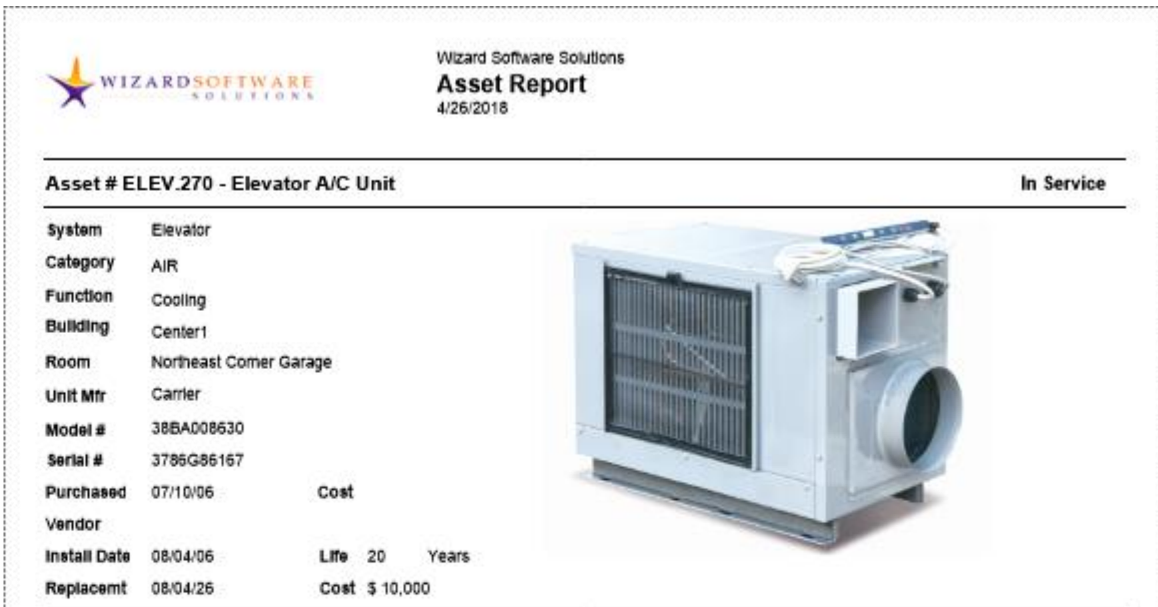


Figure 106 Asset Specifications

Click the **ASSET SPECS REPORT** button. Performo displays the Edit Report Title dialog box. Edit the existing report title if necessary; then click the **OK** button to proceed. Performo displays the Asset Report.



Wizard Software Solutions
Asset Report
4/26/2018

Asset # ELEV.270 - Elevator A/C Unit — **In Service**

System	Elevator		
Category	AIR		
Function	Cooling		
Building	Center1		
Room	Northeast Corner Garage		
Unit Mfr	Carrier		
Model #	38BA008630		
Serial #	3786G86167		
Purchased	07/10/06	**Cost**	
Vendor			
Install Date	08/04/06	**Life**	20 Years
Replacemt	08/04/26	**Cost**	$ 10,000

Figure 107 Asset Specs Report

Note that the Barcode can be automatically calculated if it is always the same as the Serial Number. The Solution Admin works with the Wizard Software Project Engineering team if the Barcode needs to be automatically calculated based on the Serial Number.

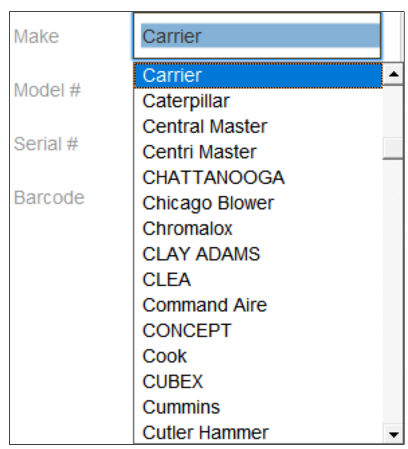


Figure 108 Asset Make value list

Type-ahead is active on the *Make* field. Click once to view the value list. Begin typing to navigate through the list of manufacturers. Optionally, click a second time to put the cursor in the Make field. A new value may be entered, or an existing entry may be edited. All unique values are automatically added to the *Make* value list. Changing a value does not affect previously entered records.

LOCATION

The location section of the Asset Detail view includes fields for Property ID, Building, Floor, Room, Location Details, and GPS. The Property ID is automatically entered and cannot be altered by users.

Click the Building field to view the choices. Single-click again to choose one; or click the field a second time to enter a new value or to edit the existing entry.

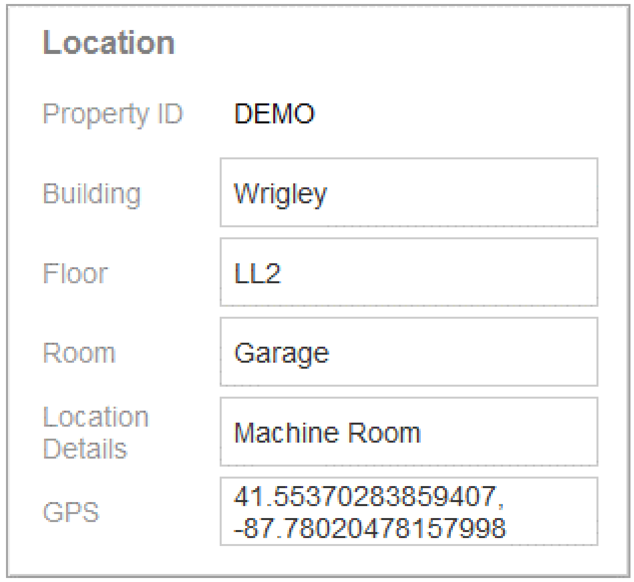


Figure 109 Asset Location

Floor, Room, and Location Details are all user-definable text fields. Enter information that will help engineers and vendors get to the asset.

The GPS field is determined by clicking on the Map. Click the map to automatically calculate and display the GPS coordinates.

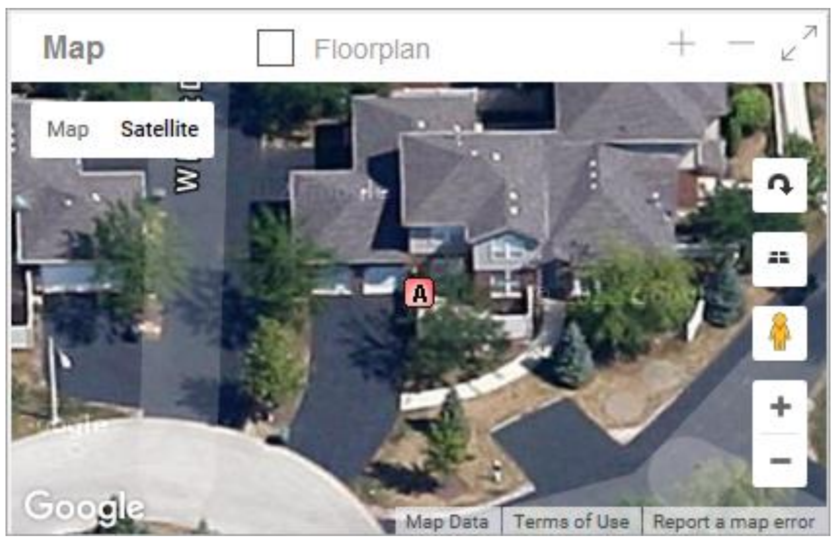


Figure 110 Asset Location>Mapping GPS coordinates

NOTES SECTION

The notes text field is user-definable. Click once to put the cursor into the field and then begin typing.

The Job Default determines the job type of work orders created from the asset. Click to choose an item from the value list.

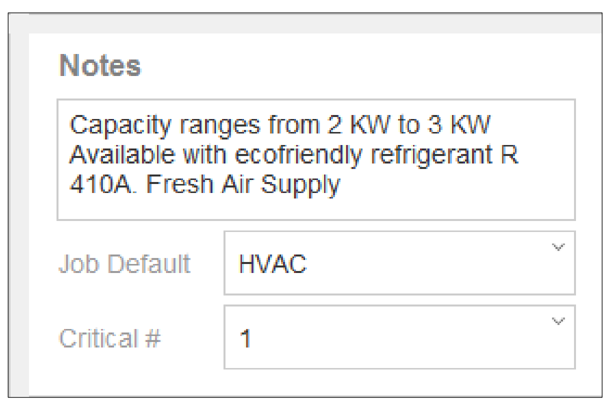


Figure 111 Notes, Job Default & Critical #

Critical number determines where the work order falls in the escalation scheme. The escalation scheme will be discussed in a separate section of this user reference guide.

PHOTO

The asset Photo container will accommodate a variety of the most common, electronic image formats such as **JPG, PNG,** and **GIF**.

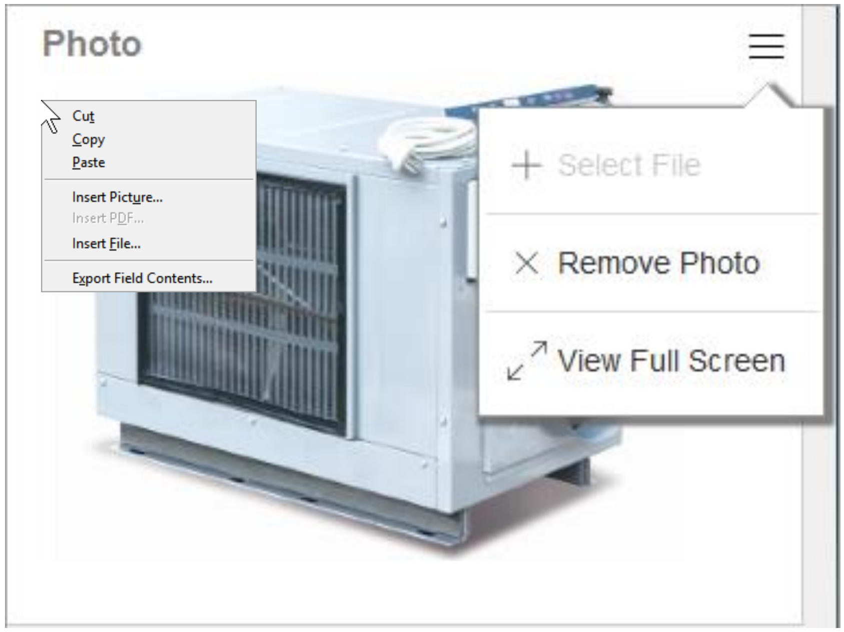


Figure 112 Asset Photo

Figure 113 View Full Screen

Right-click the container field. Options include Cut, Copy, and Paste. Click **INSERT PICTURE** or **INSERT FILE** to open the operating system dialog box and navigate to any accessible directory. Choose a file and click **OK** to put the image into the container field.

Click **EXPORT FIELD CONTENTS.** Performo opens the operating system dialog box and the image may be saved in any accessible directory.

Click the **ACTIONS** menu on the upper right-hand side of the photo container field. Performo displays options including, **+ SELECT FILE**, **X REMOVE PHOTO** and **VIEW FULL SCREEN**. Click **VIEW FULL SCREEN**. Performo displays the image on a screen that takes up the whole solution window.

Multi-megabyte images are automatically resized for database performance and on-screen viewing.

Click the **BACK** button to view the Asset Detail Overview.

ASSET DETAIL VIEW – PM SCHEDULES TAB

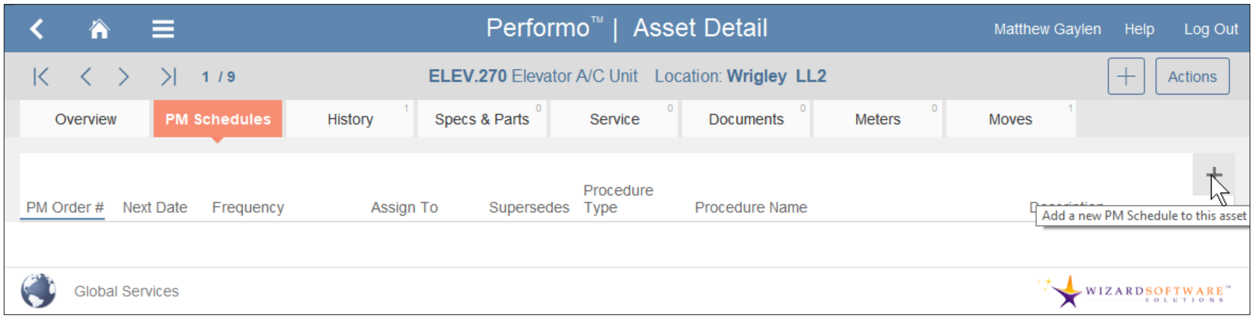


Figure 114 Asset Detail > PM Schedules Tab

Click the **PM SCHEDULES** tab. Performo displays the PM Schedules for that asset. Click the **+** button above the portal. Performo displays the Create PM for Assets dialog box. Click the **OK** button to proceed.

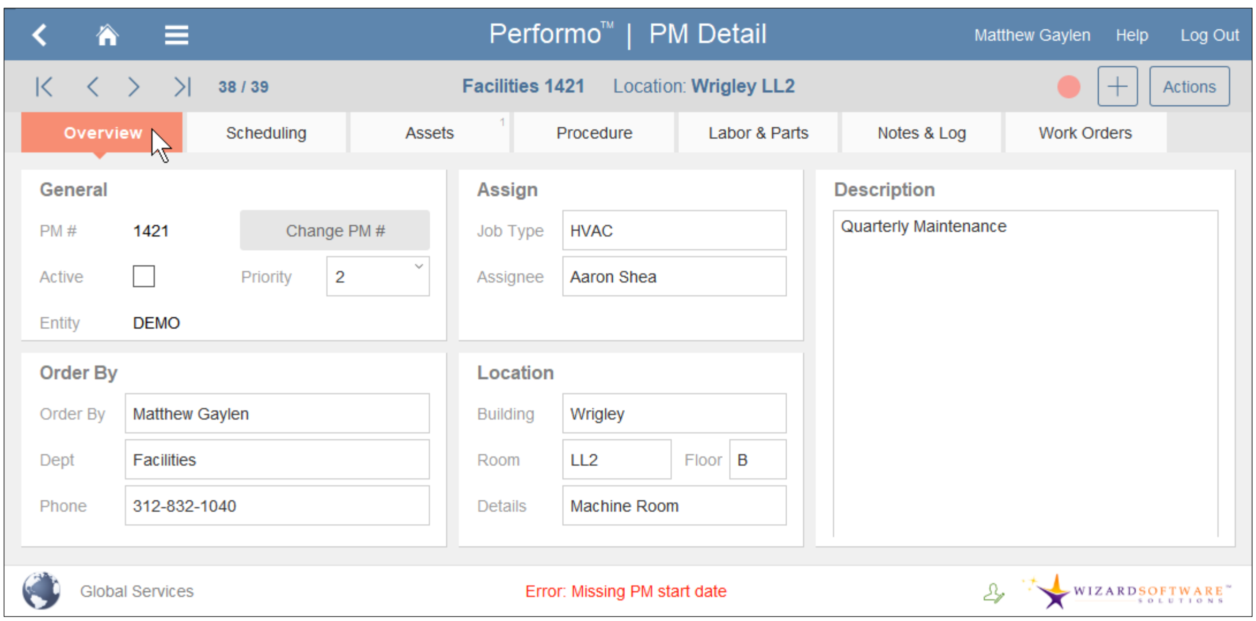


Figure 115 PM Detail View - New PM Schedule from Asset

Performo navigates to the PM Detail view. Confirm that all the information on the Overview page is correct and click the Scheduling tab to proceed. Click the **ACTIVE** checkbox after the scheduling step is complete (see page #95).

RETURN TO ASSET DETAIL AFTER COMPLETING PM SCHEDULE SETUP

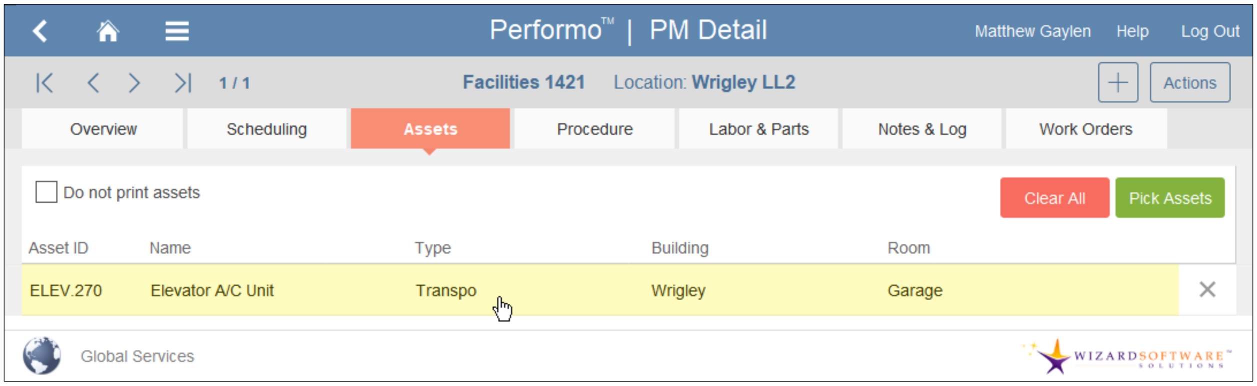


Figure 116 The asset listed on the PM Detail view: Assets tab.

After the PM Schedule is set up in the PM Schedules module, then click the **ASSETS** tab of the PM Detail view. Performo will display the asset for which the PM Schedule has been created. Click anywhere on the asset, to return to the Asset Detail view.

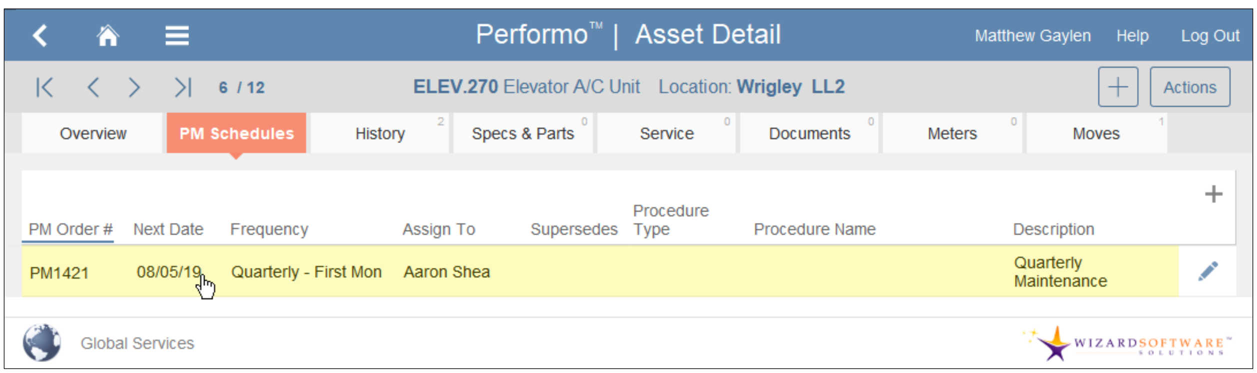


Figure 117 PM Schedule displayed on Asset Detail: PM Schedules tab.

Click the pencil icon to view the Edit PM Schedule data entry window. All the data except the frequency can be edited from this window.

Note the **REMOVE PM FROM THIS ASSET** button on the bottom right side of the page. Click to remove the PM Schedule. Verify, via dialog box because there is no undo. A deleted PM schedule must be recreated from scratch.

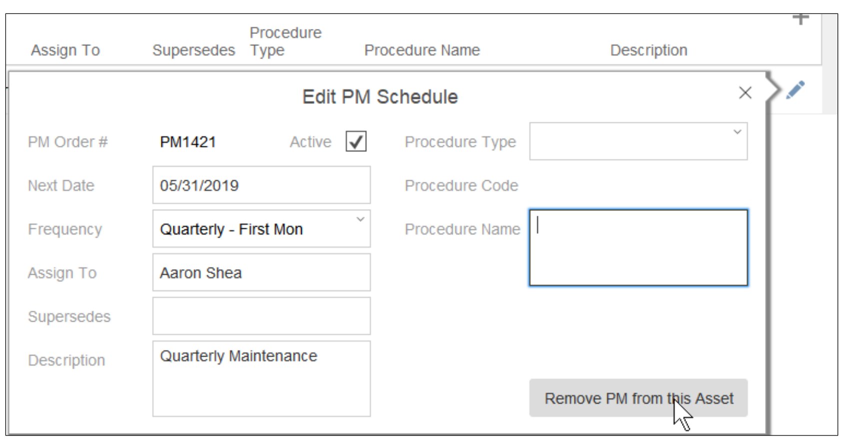
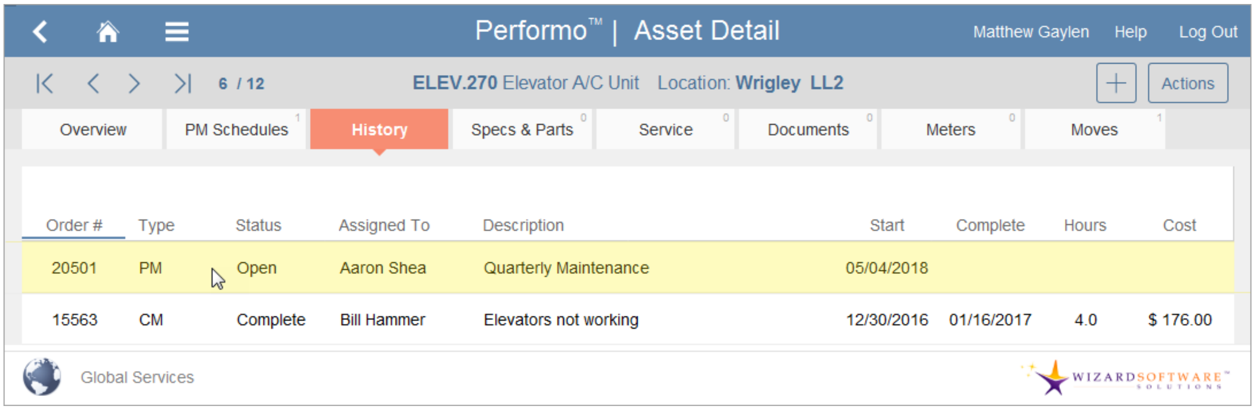


Figure 118 Record Menu Options for PM Schedules

ASSET DETAIL VIEW – HISTORY TAB



Click the **HISTORY** tab. Performo displays all the work orders to which the asset has been attached. To review how to attach an asset to a work order; see Figure 56 Assets Tab of the Work Order Detail view on page, 53.

The History tab displays Order #, Type, Status, Assigned To, Description, Start, Complete, Hours, and Cost data in list format. Hover the mouse over any record and it turns yellow. Click to navigate to the detail view in the Work Order module.

From the Work Order Detail view, click the **BACK** button to return to the History tab of the Asset Detail view. Optionally, click the Assets tab on the Work Order Detail view. Then, hover the mouse over the Asset record. Click to navigate to the Asset Detail view.

▷Video **ASSET DETAIL VIEW – SPECS & PARTS TAB**

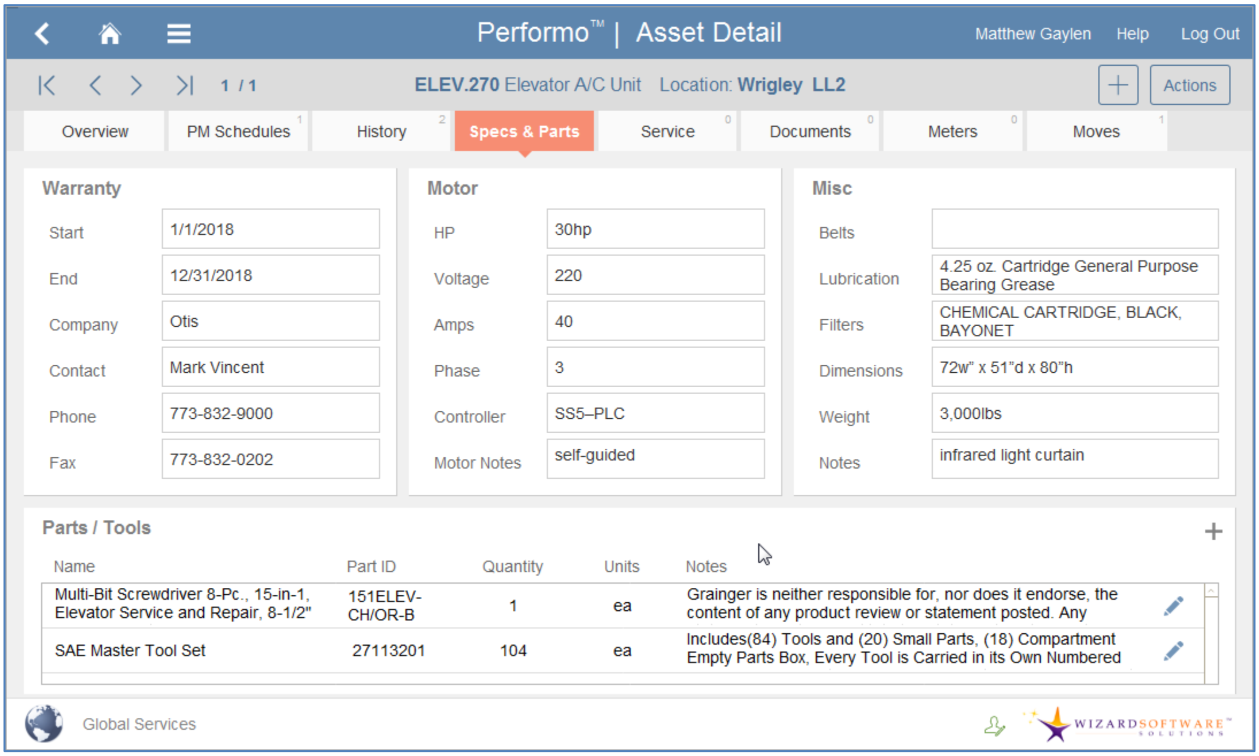


Figure 119 Specifications & Parts

Click the Specs & Parts tab. Performo displays the Specs & Parts screen. There are sections for Warranty, Motor, Miscellaneous, and Parts / Tools.

All the fields on this screen are user-definable. There are no value lists. Use the mouse or pointing device and a keyboard to enter data as needed. Best Practice; enter data into fields that will assist engineers in completing work, or that will help the engineering team track, manage and analyze asset usage.

The Solution Admin has access to naming all the fields on this screen. This is a set-it-and-forget-it control panel. Once the system goes into production, these choices affect every record having been previously created and so are usually not changed once set.

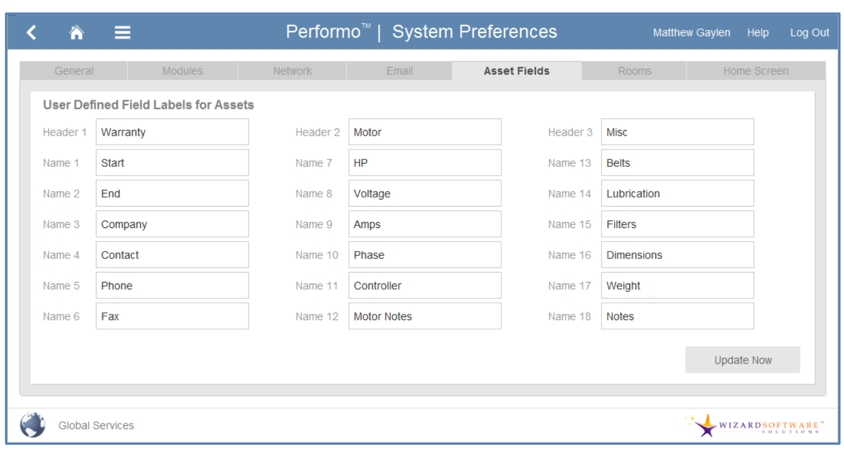


Figure 120 System Preferences for Asset Specs & Parts Screen

ASSET DETAIL VIEW – SPECS & PARTS –PARTS / TOOLS PORTAL

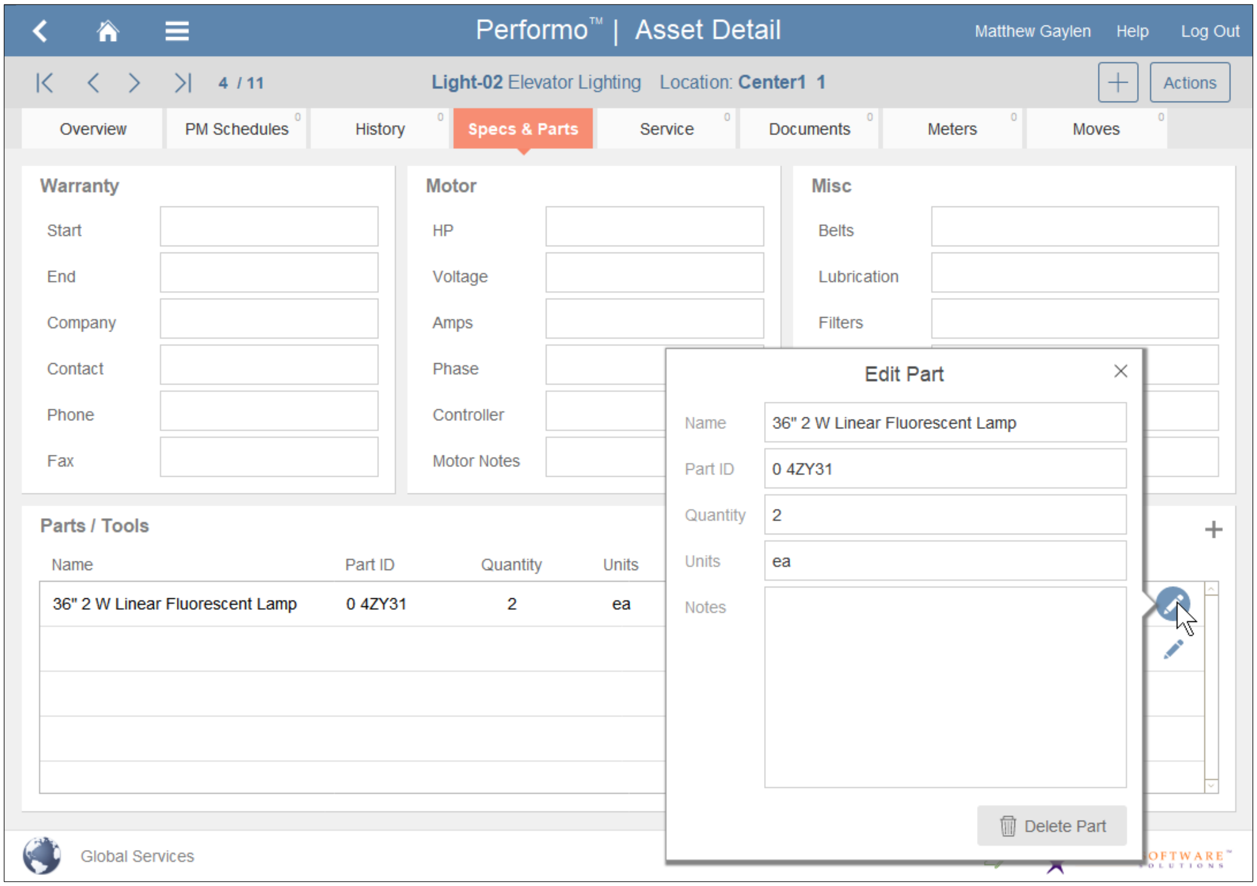


Figure 121 Parts / Tools Portal

The Parts / Tools portal on the Specs & Parts tab displays a list of parts and tools related to the asset. Parts are added to assets after they are added to the Inventory module. The Inventory module will be discussed later in this user reference guide.

Click the + button above the right side of the portal. Performo displays the Edit Part data entry window. Both the Name and the Part Code value lists can be used to select the part.

Once the part is added to the asset, the asset will also show up in the Assets tab of the Part Detail view for that part. This is also discussed later in this user reference guide.

Click the PENCIL ICON to open the Edit Part data entry window. All the fields can be edited manually. Click the DELETE PART button in the Edit Part data entry window to remove the part from the asset… and to remove the asset from the part. This does not delete the part from the Parts module. Click anywhere on the part record to navigate to the Detail view for that part in the Parts module.

ASSET DETAIL VIEW – SERVICE TAB

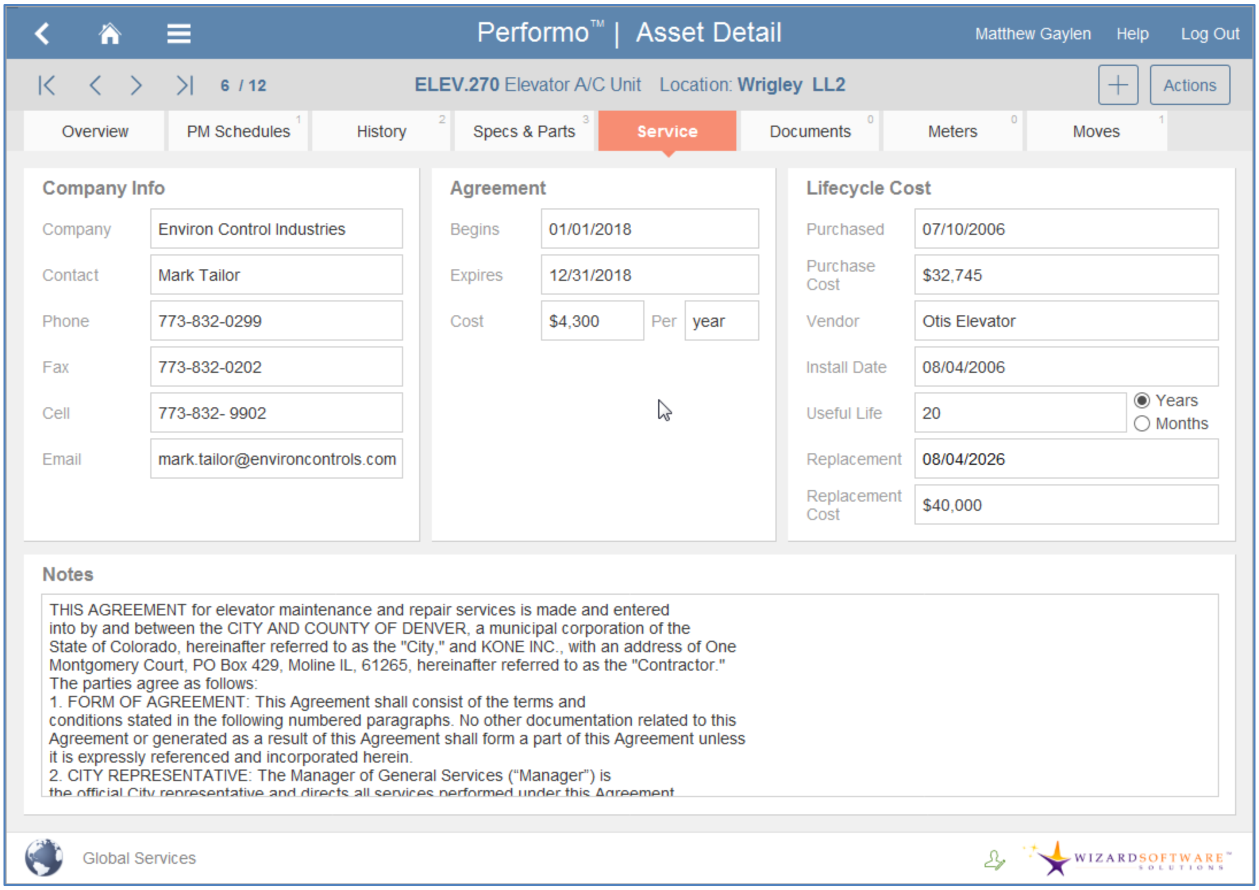


Figure 122 Asset Detail - Service Tab

Click the **SERVICE** tab. Performo displays sections for Company Info, Agreement, Lifecycle Cost, and Notes. Enter data as needed.

Reminder: click any of the **DATE** fields to view the calendar. Use the mouse to choose a date or click a second time to put the cursor in the field. Once the cursor is in the field, the existing date may be edited, or any new date may be entered.

▷Video [ASSET DETAIL VIEW – DOCUMENTS TAB]

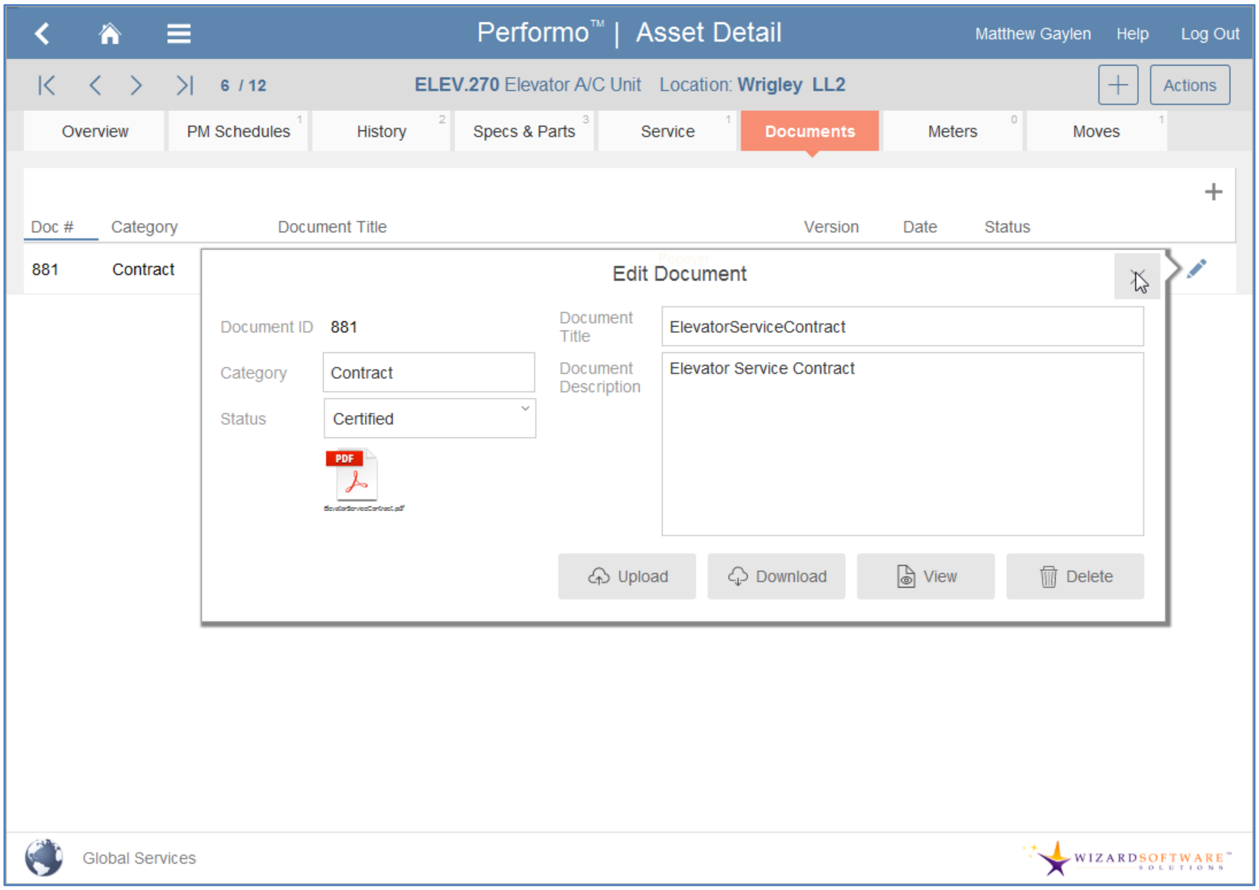


Figure 123 Asset Detail - Documents tab

Click the **DOCUMENTS** tab. Performo displays the portal of documents having been attached to the asset. Please refer to Work Order Detail – Documents Tab on page #56 for a complete discussion about entering and editing documents.

ASSET DETAIL VIEW – METERS TAB

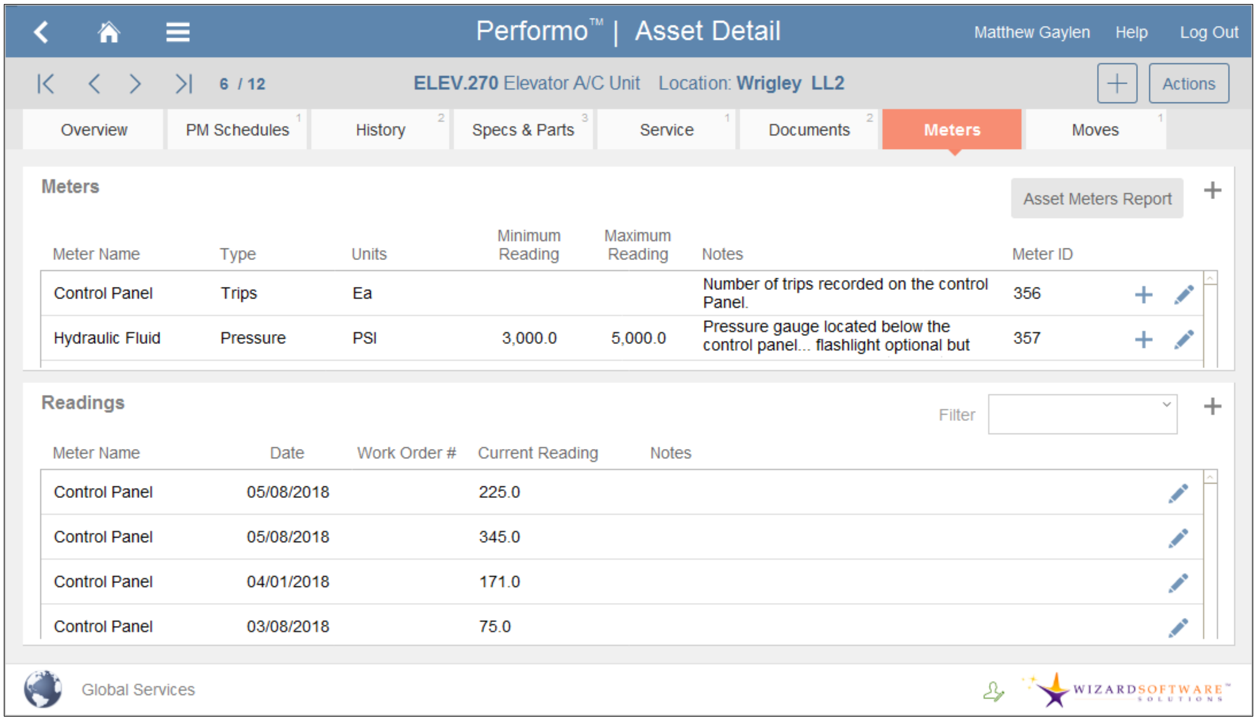


Figure 124 Asset Detail - Meters Tab

Click the **METERS** tab. Performo displays a portal of meters and a portal of readings. Please refer to meter reading set up: part II – meters tab of asset detail on page #76 for the complete discussion about meters and readings.

ASSET DETAIL VIEW – MOVES TAB

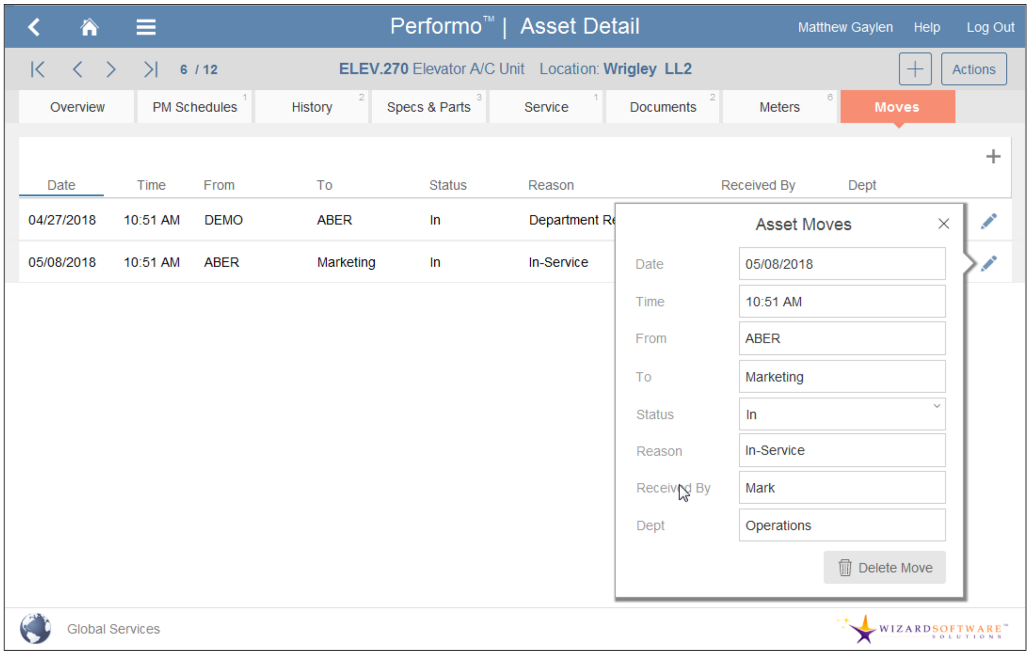


Figure 125 Asset Detail - Moves Tab

Click the **MOVES** tab. Performo displays the list of places where the Asset was and when.

Each move is manually entered. Click the **+** button above the portal to view the Asset Moves data entry window. Enter the date the item was moved and the time if necessary. The From field is calculated automatically based on the last place the asset was located. Click to put the cursor in the field to edit the entry if necessary. Enter the new location for the asset. Enter the Status. The Solution Admin can request edits to the Status value list.

Enter the Reason. Note that the Reason value list is user-definable. Please consult the Solution Admin prior to changing the Reason value list. Changes to the Reason value list affect every user henceforth, but do not change values chosen on previously entered records. Enter the person who signed for the asset in its new location and their department if necessary.

Click the **DELETE MOVE** button if the record was created erroneously, or if the historical record is no longer needed. Click the **X** in the upper right-hand corner to accept, save and close the data entry window.

▷Video [Adding a PM Schedule to an Asset]

PM Schedules Module

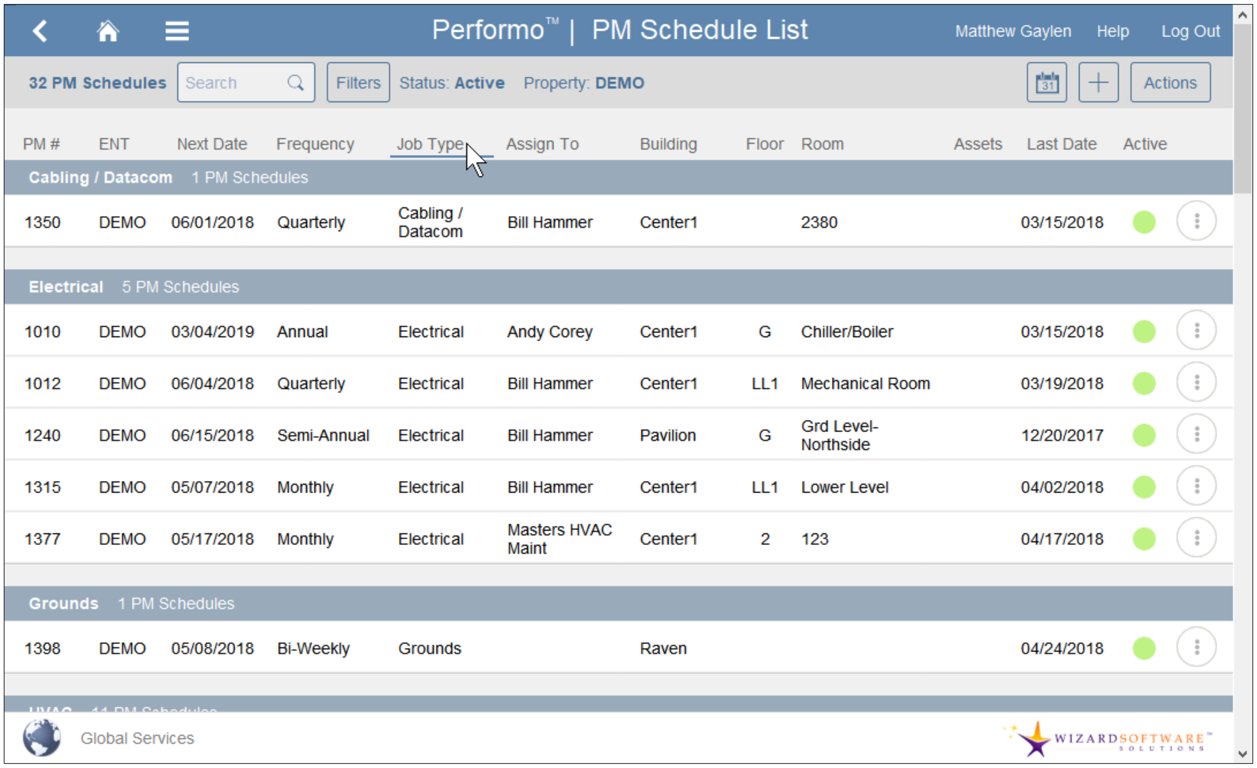


Figure 126 PM Schedule List View

▷Video [PM Schedules List View]

List view displays PM Schedules. PM Schedules are templates for planning and executing work to be done. The work can be related to one or more assets or can be tasks, duties, or procedures to be performed in and around the entity.

List view displays columns for PM #, Entity, Next Date, Frequency, Job Type, Assign To, Building, Floor, Room, Assets (# of assets), Last Date, and a green Active dot. The dot turns red if the PM Schedule is inactive. Click the column heading to sort the list by that value.

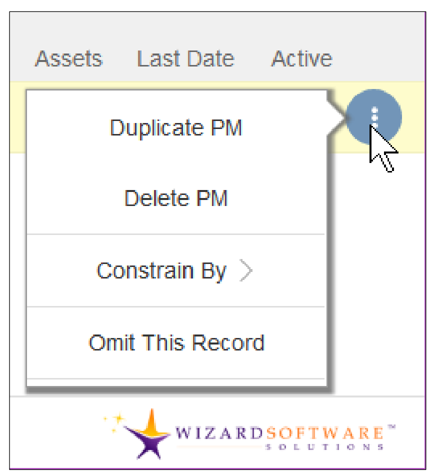


Figure 127 PM Schedule Records Menu

Click the **RECORDS MENU** button (three vertical dots in a circle). Commands that can be executed from the Records Menu include Duplicate, Delete, Constrain By, and Omit. Omit removes the record from the found set, but does not delete it. Constrain provides the ability to narrow down the found set by any column in list view.

ACTIONS FOR PM SCHEDULES LIST VIEW

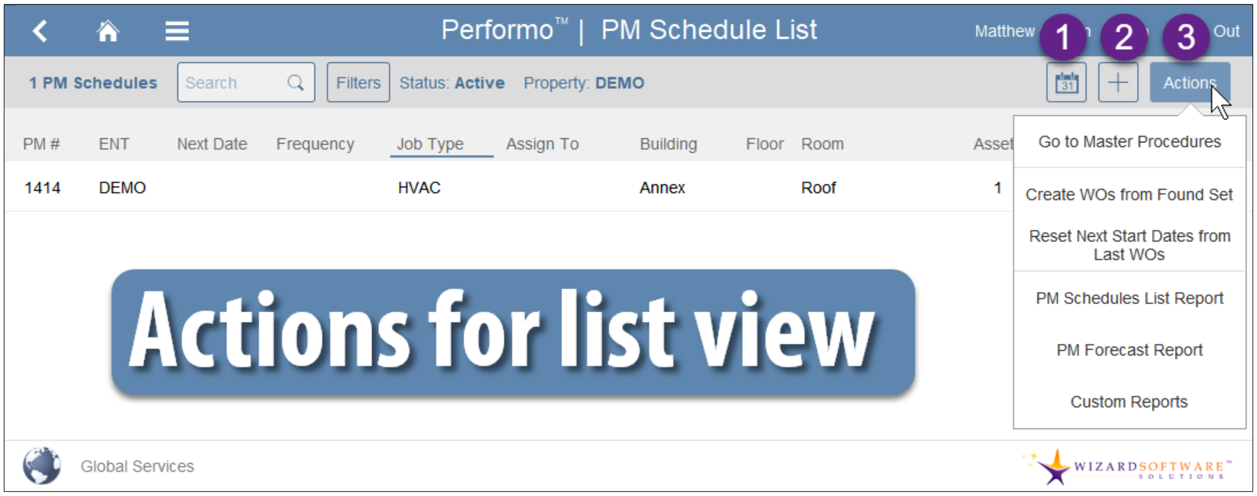


Figure 128 Actions for PM Schedules List View

1) Click the **CALENDAR** icon on the Actions bar. Performo displays the found set of PM Schedules on a calendar layout. There are three calendar views; PM View, Worker View, and Job Type view. Sample calendars appear on the next page. On the calendar click the PM, Worker, or Job type to navigate directly to the detail view of that PM Schedule.
2) Click the **+** button to create a new PM Schedule from scratch.
3) Click the **ACTIONS** button. Performo displays the list of actions for PM Schedules. Options include, Go to Master Procedures, Create WOs from Found set, Reset Next Start Dates from Last WOs, PM Schedules List Report, PM Forecast Report, Custom Reports.

Creating work orders from found set is a powerful command but should only be executed with extreme caution because there is no undo script. Click **CREATE WOs FROM FOUND SET**. Performo will automatically create a work order from every PM Schedule in the found set. Simultaneously, and automatically, the *next date* will be advanced by the *frequency*. The new work orders can be viewed in the Work Order module. Scheduling terms such as *next date* and *frequency* will be discussed in a subsequent section of this user reference guide.

Note that the only route to viewing Master Procedures is from the Actions Menu on the PM Schedule Detail view. Master Procedures have been discussed in a previous section of this user reference guide.

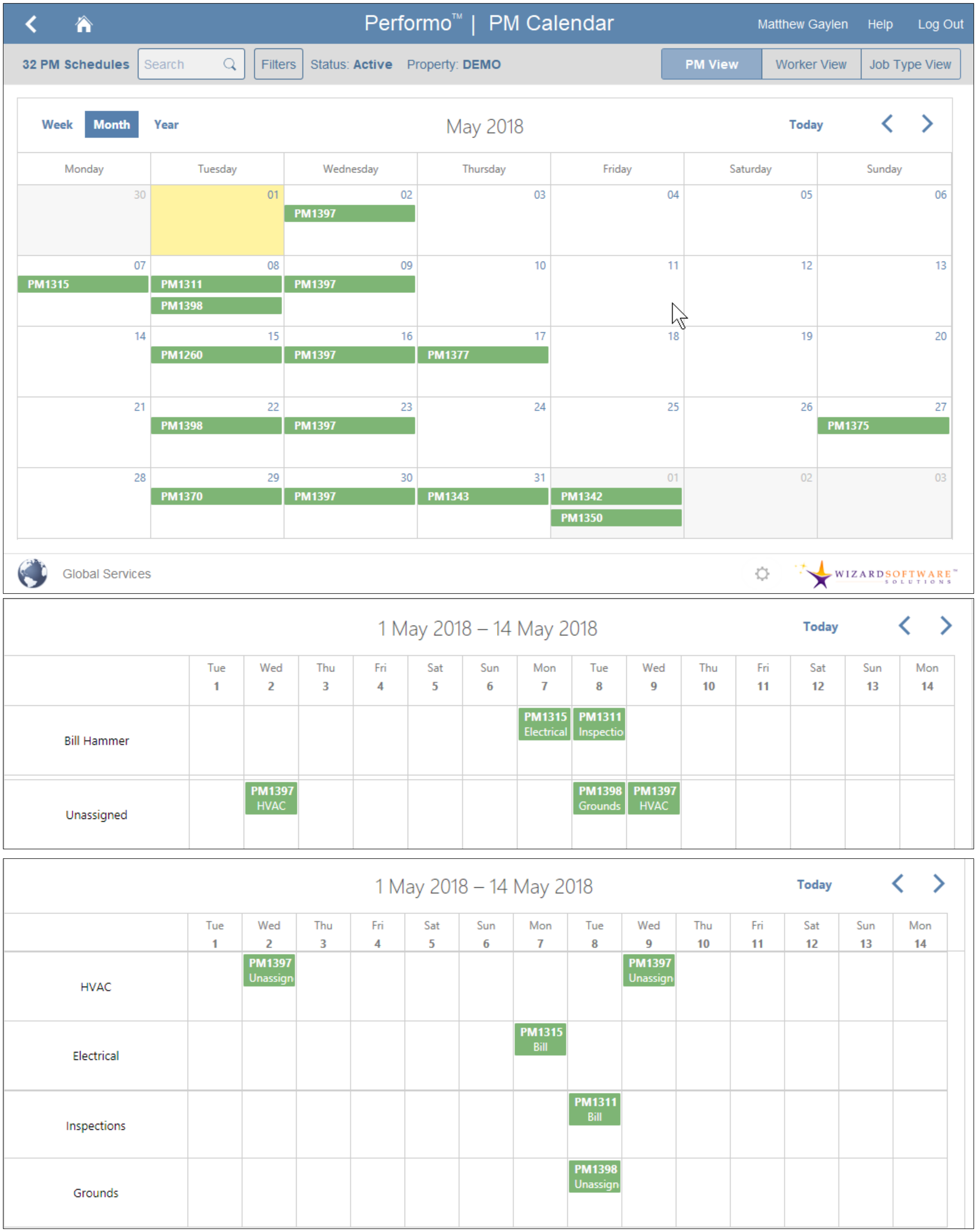


Figure 129 Preventive Maintenance Schedules Calendar Display Options

▷Video PM Detail View – Overview Tab

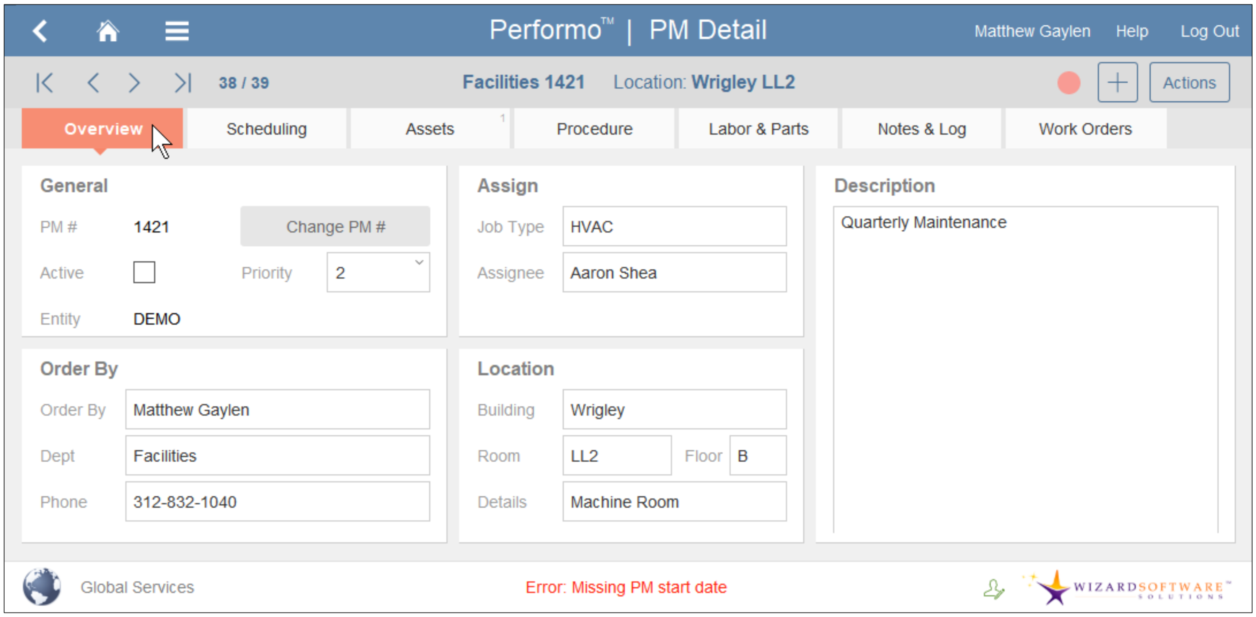


Figure 130 PM Overview Tab

Click anywhere on any row in list view. Performo navigates to PM Detail view and displays the Overview tab. Additional tabs provide space for; Scheduling, Assets, Procedure, Labor & Parts, Notes & Log, and, Work Orders.

The Overview tab is divided into five sections; General, Order By, Assign, Location, and Description.

In the General section; the PM number is automatically assigned.

Click the **CHANGE PM #** button if it becomes necessary to enter a new, unique ID number for the PM Schedule. Do not attempt to click the Active checkbox yet.

Click the **ACTIVE** checkbox after the scheduling step is complete.

Click the **PRIORITY** checkbox and choose a value from the list. The Entity is displayed but is not user-definable.

THE ORDER BY SECTION.

Click the Order By field to display the value list. Type-ahead is active. Begin typing to navigate through the list to the desired value. Performo will automatically add the Department and Phone number from the Staff table.

THE ASSIGN SECTION.

Click the JOB TYPE value list. Performo displays the value list. Type-ahead is active. Begin typing to choose a value. Click the Assignee value list. Performo displays the value list. Type-ahead is active. Begin typing to choose a value.

THE LOCATION SECTION.

Click the Building field. Performo displays the value list. Type-ahead is active. Begin typing to choose a value. Room number, Floor, and Details fields are user-definable. Enter data that will assist engineers and vendor employees in locating the asset.

THE DESCRIPTION SECTION.

The Description field is a user-definable text field. Enter any data that will define, explain and clarify the preventive maintenance schedule. Best practice it is probably not necessary to duplicate task steps and procedures in the Description field.

▷Video PM Detail View – Scheduling Tab

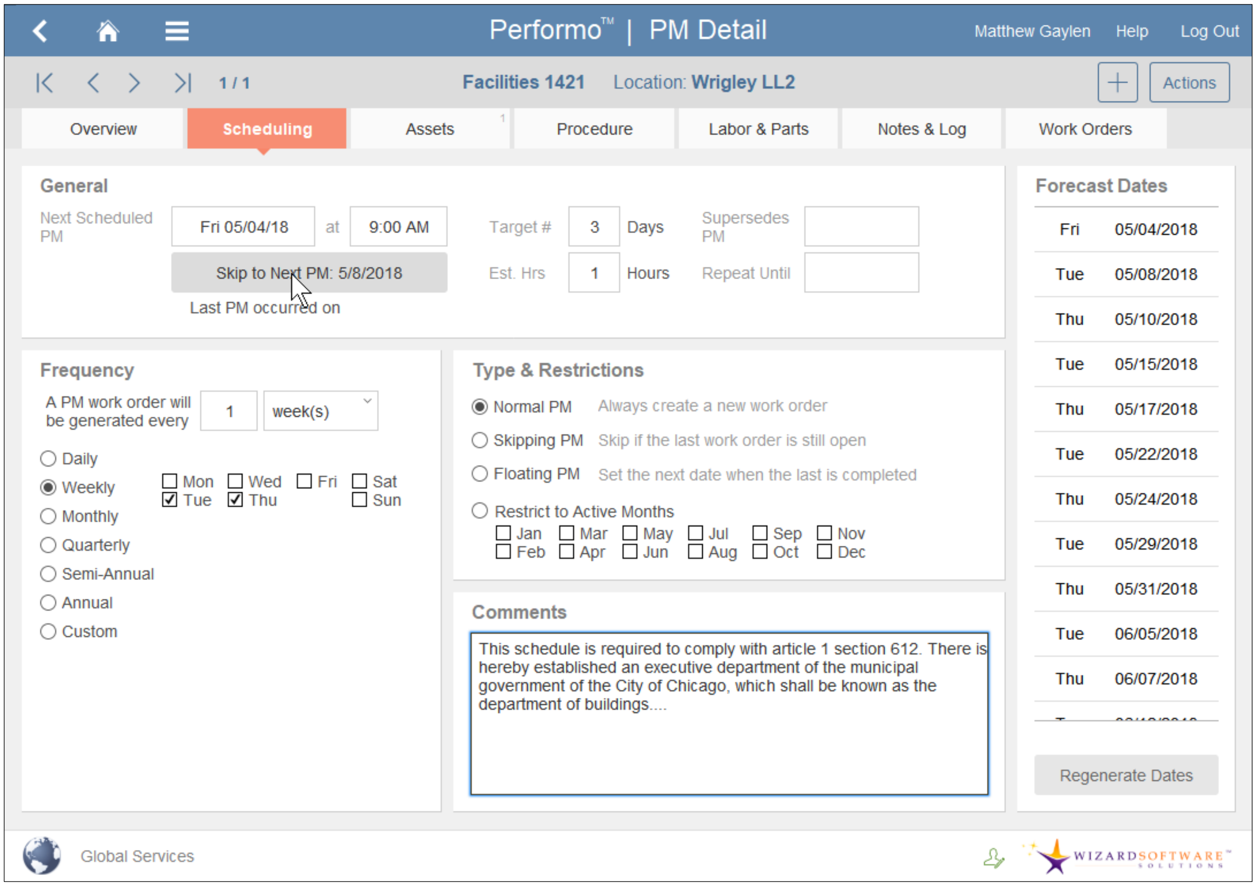


Figure 132 PM Detail - Scheduling Tab

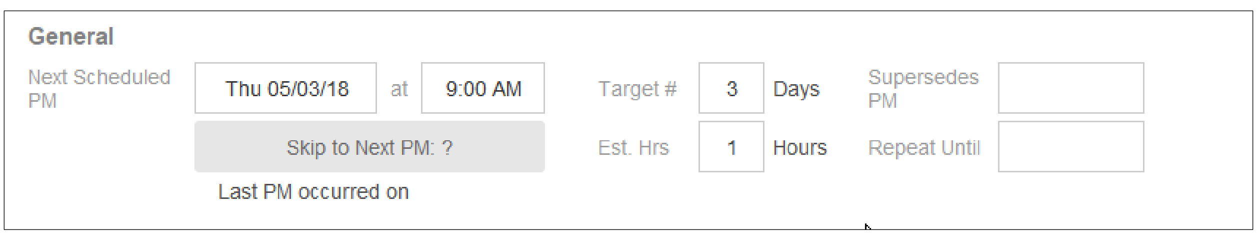


Figure 131 General Scheduling details

Performo uses PM schedules to automatically create PM Work orders on their due dates. There are five sections on the Scheduling tab. In the General section; click the **NEXT SCHEDULED PM** field. Performo will display the drop-down calendar. Use a pointing device to choose a date or single-click a second time to manually enter a date. Enter a time if the work is to be completed at a certain time of day. Enter the target number of days the team has to complete the work. Estimate the number of hours it should take to complete the work.

TYPES OF PREVENTIVE MAINTENANCE SCHEDULES

Since many assets require different kinds of periodic maintenance at different intervals, there are occasions when a quarterly PM Schedule will include some of the same tasks as an annual PM Schedule. When this occurs, Performo allows one PM Schedule to supersede another PM Schedule. What this means is that when the quarterly PM schedule falls on the same date as the annual PM schedule the PM Admin can elect to have the annual PM Schedule supersede the quarterly schedule. The work order for the annual PM will be created, and the work order for the quarterly schedule will automatically be advanced to its next interval.

Click the **SUPERSEDES PM** field to view the list of PMs that can be selected. The current PM will supersede the selected PM. As previously mentioned, when the two PMs occur on the same date, the current PM will be printed, and the PM selected will be skipped.

Click the **REPEAT UNTIL** field and enter a date. PM work orders will be created based on the Schedule until that date. If no date is entered, PM work orders will be created forever.

Click the **SKIP TO NEXT PM** button. Once the PM Schedule is activated, the button will display the date of the next work order. This is useful in situations where the previous PM work order was recently completed. The date of the Last PM schedule is also displayed.

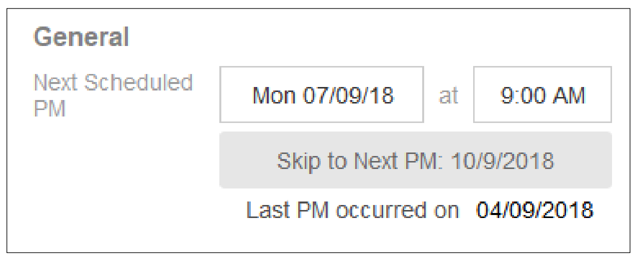


Figure 133 General Section of PM Schedule detail

DAILY SCHEDULE

Click the **DAILY** radio button. A PM work order will be generated every 1 day. Click the **EXCEPT WEEKENDS** checkbox and Performo will only create PM work orders on weekdays. For Daily PM Schedules, the number and the period (days weeks months) is not user-definable.

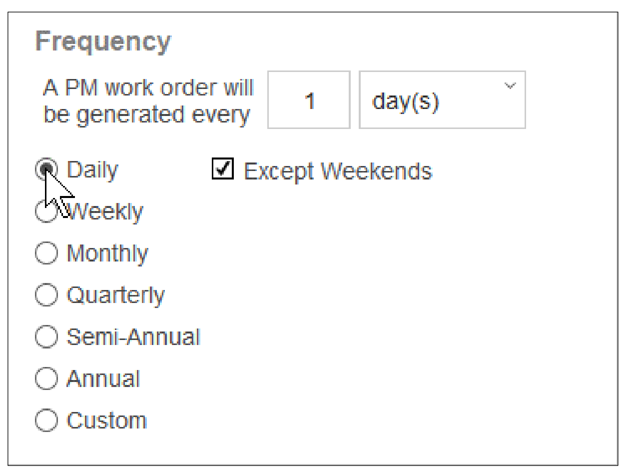


Figure 134 Daily Schedule

WEEKLY SCHEDULE

Click the **WEEKLY** radio button. Performo displays the Weekly PM dialog box. Options are 3, 2, or 1 weeks. Performo automatically displays the number selected. Again, the number and the period are not user definable since the radio buttons determine the schedule. Click the **WEEKLY** button again to edit the number of weeks.

The next step is to choose the day or days to complete the work. Check as many boxes as needed. A PM work order will be generated every interval on the days checked.

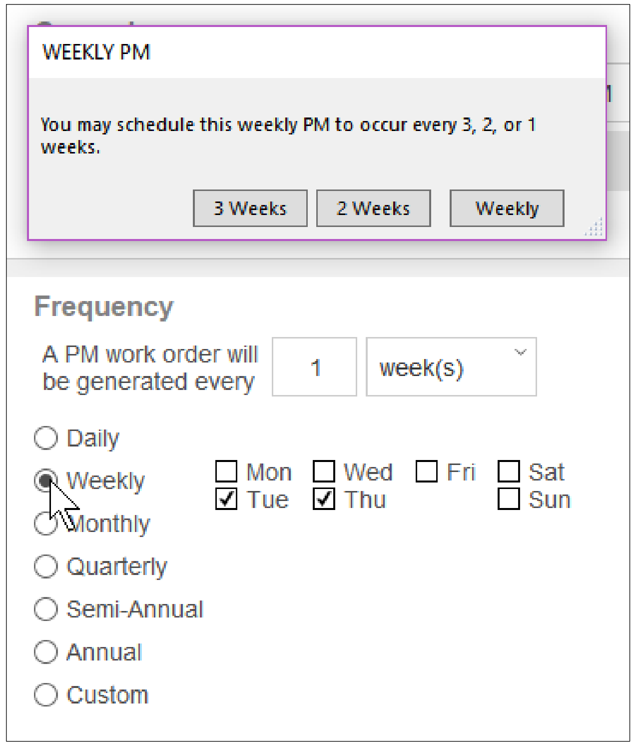


Figure 135 Weekly PM Schedule

MONTHLY – ON A DESIGNATED DAY OF THE MONTH

Click the **MONTHLY** radio button. Performo displays the Monthly PM dialog box. Options are 4, 2, and 1 months. If three months is required, please use the Quarterly option. Performo automatically displays the number and months when the PM work order will be generated. If the work order is to be completed on a specific day of the month, then click the radio button on the left of the On Day # subheading. Then, enter the day of the month. Best practice in this case is not to choose the 31st day of the month.

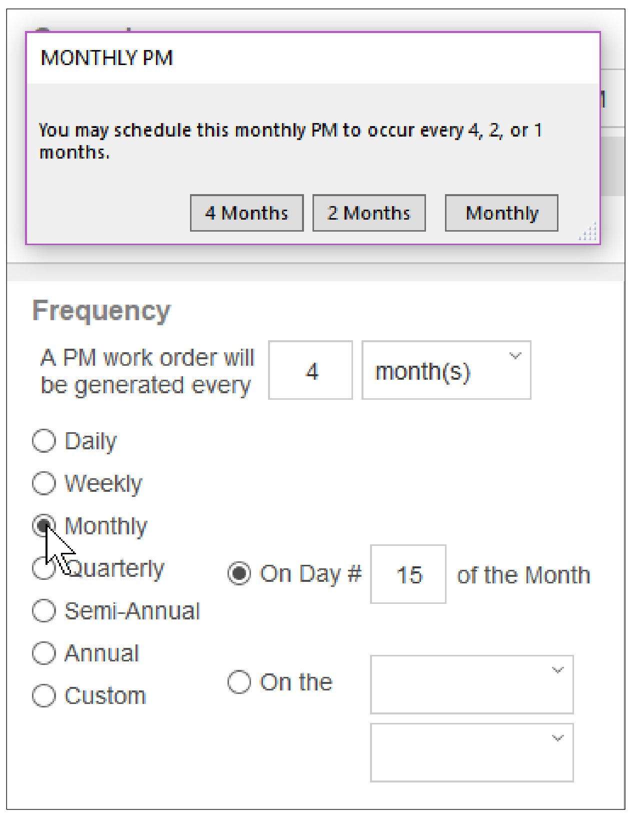


Figure 136 Monthly on a Designated Day of The Month

MONTHLY – ON A SPECIFIC INTERVAL

Click the **MONTHLY** radio button. Performo displays the Monthly PM dialog box. Options are 4, 2, and 1 months. Use the Quarterly option for 3 months. Performo automatically displays the number and months when the PM work order will be generated. If the work orders are to be generated based on a specific ordinal on a specific weekday click the radio button to the left of the **ON THE** subheading. There are two value lists. One for first, second, third, fourth, and last; and one for each day of the week. Choose an ordinal number and a weekday. The PM work order will be generated using that interval.

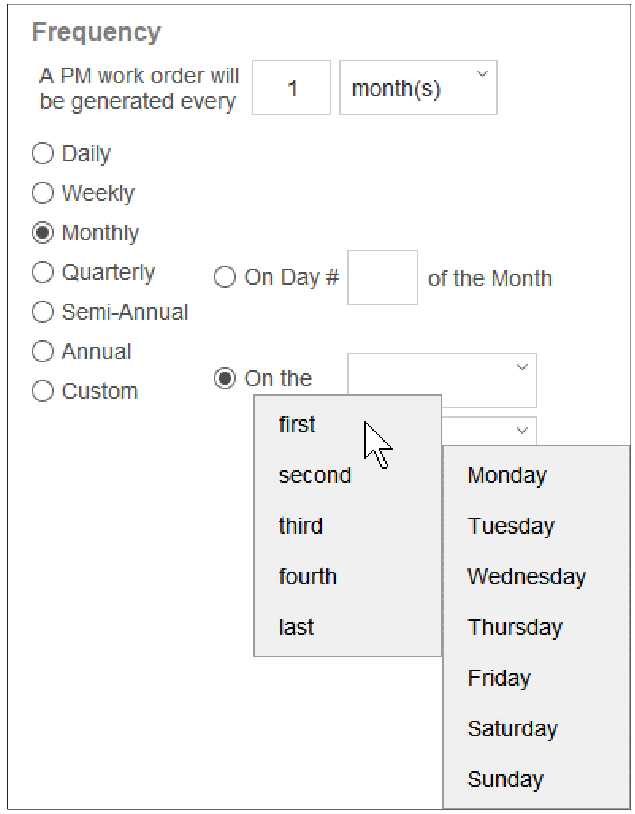


Figure 137 Monthly - on a specific interval

QUARTERLY & SEMI-ANNUAL PM SCHEDULES

Quarterly and semi-annual PM schedules operate exactly the same way as monthly PM schedules.

ANNUAL PM SCHEDULES

Click the Annual radio button. Performo will generate a PM work order on the date specified. Chose a specific day of the month, or a specific ordinal of any day. If the PM doesn't fall on that day, it will be advanced automatically. Click the **REGENERATE DATES** button to view results.

If the PM has generated one or more work orders, the date of the most recent occurrence will be displayed under the **SKIP TO NEXT PM** button.

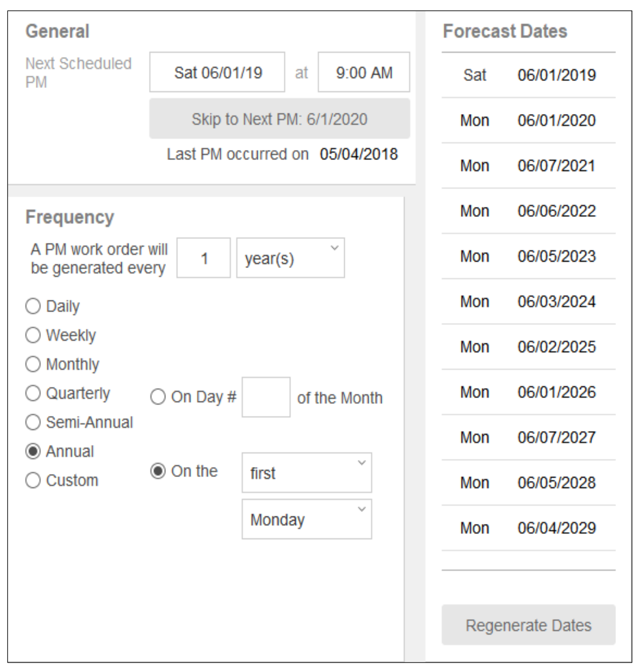


Figure 138 Annual PM Schedule

CUSTOM SCHEDULE

Click the **CUSTOM** radio button. Performo activates the fields to the right of the subheading, “A PM work order will be generated every.” The number field is user-definable. Any whole number may be entered. The second field displays a pop-up menu. Options are **DAY(S), WEEK(S), MONTH(S), YEAR(S)**. Schedule work orders using these two fields. For example, 5 months, 2 years, or 13 weeks. Chose a specific day of the month, or a specific ordinal of any day. If the PM doesn’t fall on that day, it will be advanced automatically. Click the **REGENERATE DATES** button to view results.

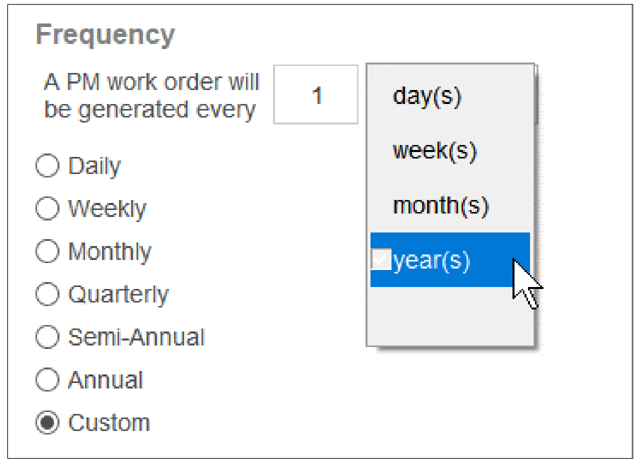


Figure 139 Custom Schedule

TYPE & RESTRICTION OPTIONS FOR PM SCHEDULES

Click the **NORMAL** radio button. Performo will create a new work order every scheduled interval.

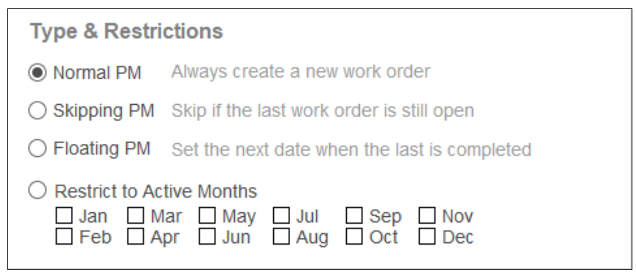


Figure 140 PM Schedule Type & Restrictions

Click the **SKIPPING PM** radio button. Performo will not create a new work order from the PM schedule if there is still an open work order having been created by that PM Schedule. For example; if the PM Schedule creates a work order the first of every month and skipping is selected, then Performo will create another work order the first of the next month after the previous work order was completed. If the PM work order is completed May 31, then, the next work order will be created on June 1.

Click the **FLOATING PM** radio button. Performo will create the first PM work order as scheduled. The next work order will be created on {**THE DAY THE LAST WORK ORDER WAS COMPLETED + THE INTERVAL**}. So, if the interval is three weeks, then the next work order will be created three weeks after the previous work order’s completion date.

Click the **RESTRICT TO ACTIVE MONTHS** radio button. Then click the checkboxes for each month that work orders should be created. For example, stairway and sidewalk salting PM work orders probably do not have to be created in June, July, or August.

COMMENTS & FORECAST DATES

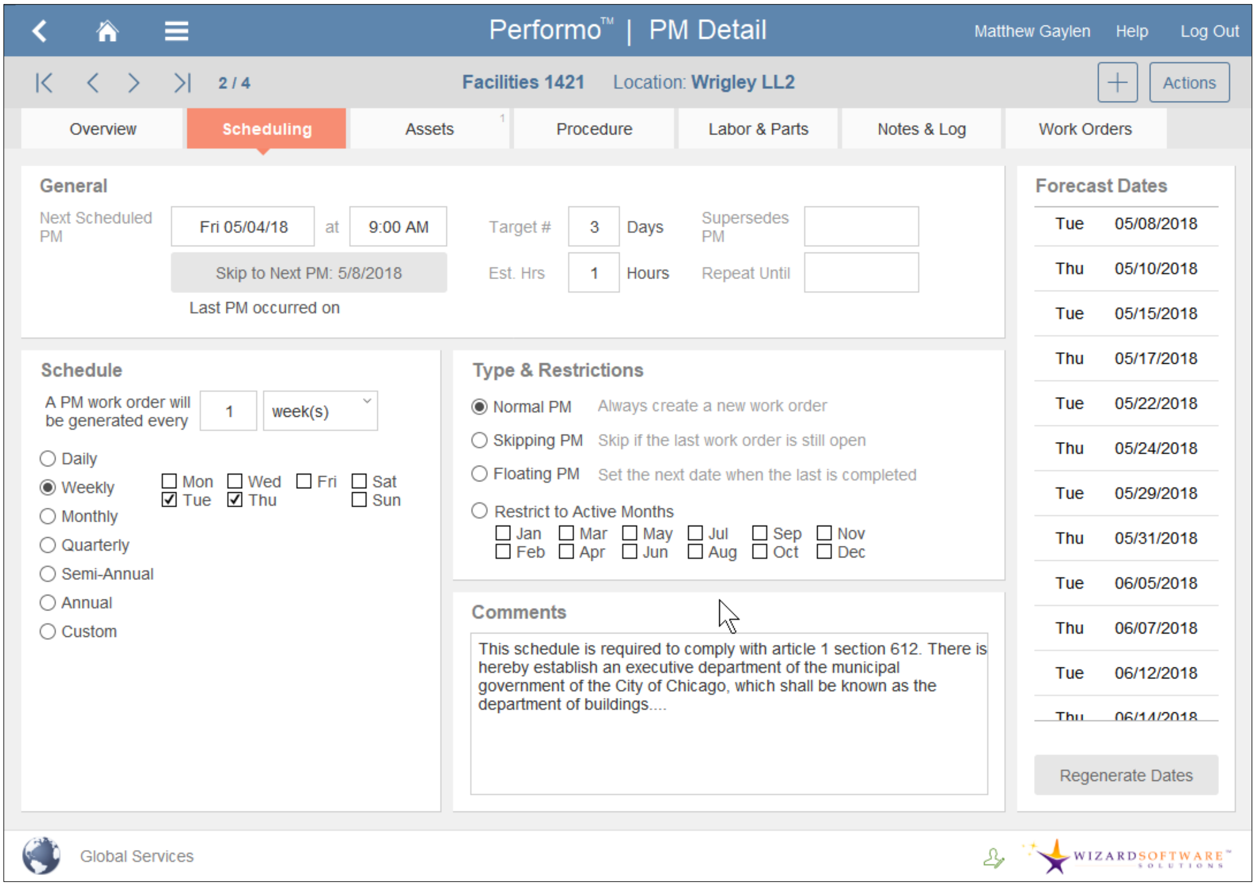


Figure 141 Scheduling Comments & Dates

The comments field is a user-definable text field. Any data may be entered.

Click the **REGENERATE DATES** button. Performo automatically calculates and displays the next scheduled dates of work orders to be created from the schedule.

NOTE: Performo uses the PM schedule to create PM work orders. The PM work orders are automatically placed in the queue of open work orders in the Work Orders module. To clarify; Preventive Maintenance (PM) work orders are different than Corrective Maintenance (CM) work orders. PM work orders are created automatically from PM schedules, while CM work orders are created on demand by staff empowered to do so. Please be aware that, depending on context; the term, "PMs," may refer to PM Schedules or PM work orders. Again, the context of the conversation may provide clues as to whether or not a person is talking about a schedule or an order.

▷Video

PM Detail View– Assets Tab

Click the **ASSETS** tab. Performo displays assets attached to the PM Schedule.

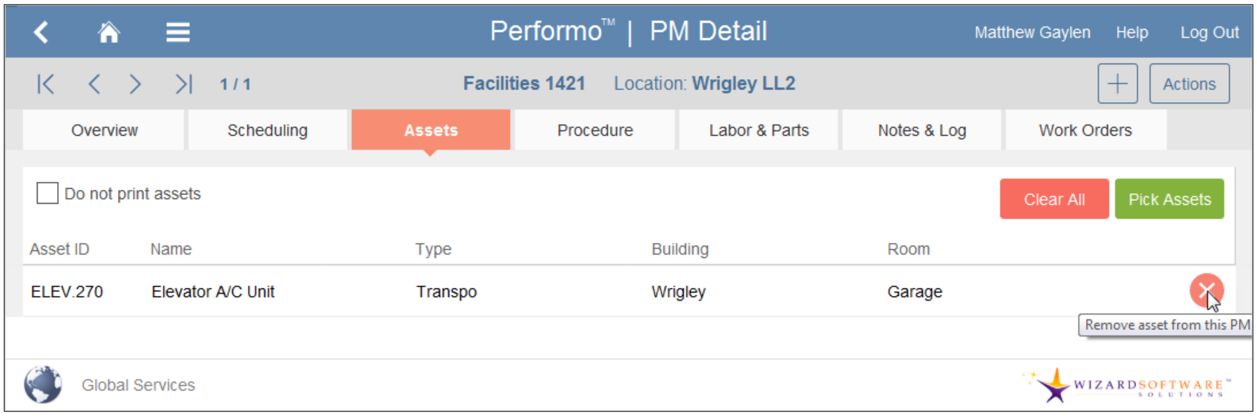


Figure 143 PM Detail - Assets Tab

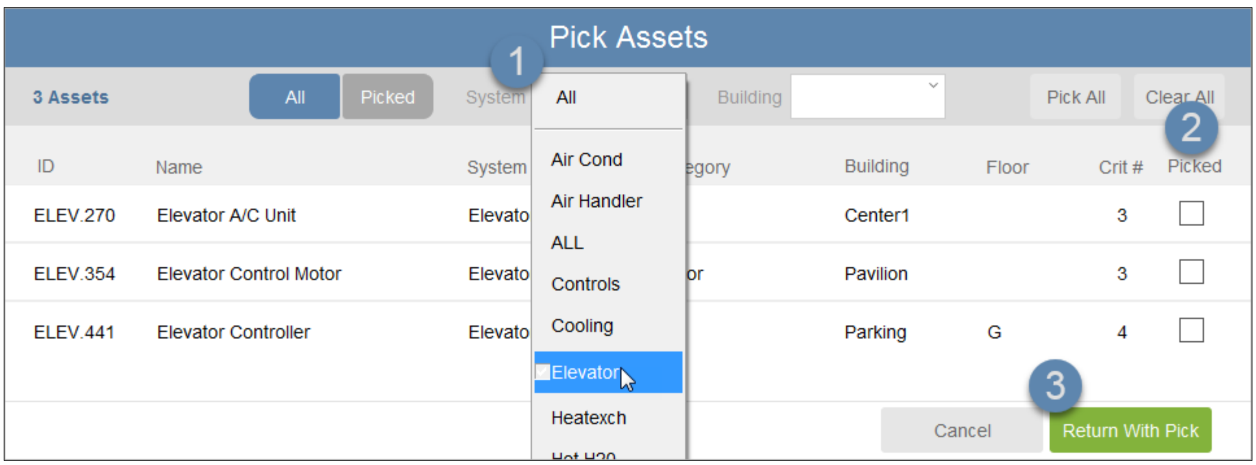


Figure 142 Pick Assets

Click the **PICK ASSETS** button. Performo will automatically display the Pick Assets data entry window.

Click the System field to display the value list. Choose an option.

Click the **PICKED** checkbox for the assets that need to be added to the work order.

Click the **RETURN WITH PICK** button. Performo automatically displays the assets in the Assets portal on the PM Detail view.

Click on any asset to navigate to the Overview tab of the Assets module.

Click the white **X** in the red circle on the right side of the row to remove the asset from the PM Schedule. Deleting an asset from a PM schedule does not delete the asset from any previously created work orders having been created from that PM Schedule.

PREVENTIVE MAINTENANCE WORK ORDER – ASSET DISPLAYED

Wizard Software Solutions
WORK ORDER # 10023
5/8/2018

SCHEDULED MAINT WORK ORDER # 20501

Assign To	Aaron Shea	**Order By**	Matthew Gaylen	**Entry Date**	05/05/18	1:00 AM
Job Type	HVAC	**Dept**	Facilities	**Target Date**	05/07/18	
Building	Wrigley	**Phone**	312-832-1040	**Work Start**	05/04/18	8:00 AM
Floor		**Priority**	2	**Completed**		
Room	LL2					
Location	Machine Room					

Work Order Cost

Labor - Name / Trade	Date	Hours	Rate	$ Amount
	Labor Totals			

Part Name	Part ID	Qty	Units	Unit $	$ Amount
				Parts Total	
				Total Cost	

Asse		Done	Category	Notes
ELEV.270	Elevator A/C Unit	☐		

PROCEDURE / CHECKLIST
Quarterly Maintenance

Conditional / Completion Status

Completion Date _____ / _____ / ____ **Time** _____ : ____ **Technician** _________

Figure 144 Preventive Maintenance Work Order - Asset Displayed

On the assets tab of the PM Detail view, click to check the box for **DO NOT PRINT ASSETS** and Performo will omit the listing of assets from the printed work order. The assets will still be attached to the PM Schedule – they just will not appear or the printed work order.

▷Video PM Detail View - Procedure Tab

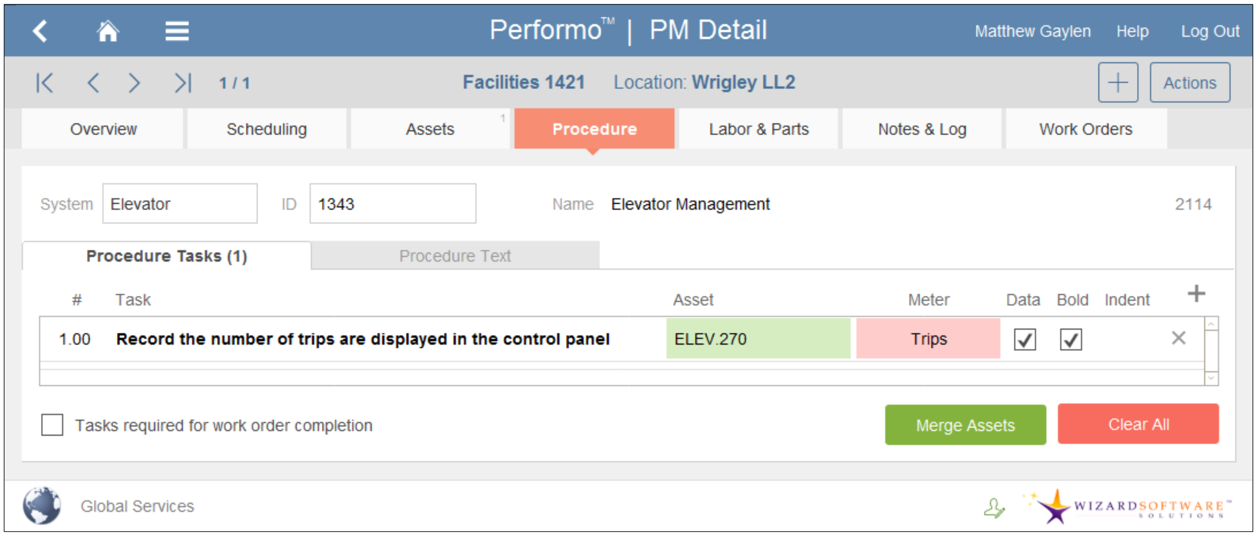


Figure 145 PM Detail View - Procedure Tab

Procedures are covered in depth starting on page #66, Master Procedures.

Click the **+** button above the Procedure Tasks portal to create a new procedure.

Click the **X** at the right side of the row to delete the procedure.

Click the green **MERGE ASSETS** button. Performo will merge procedures tied to assets to this PM schedule.

Click the red **CLEAR ALL** button to remove all the procedure tasks.

▷Video **PM Detail View – Labor & Parts Tab**

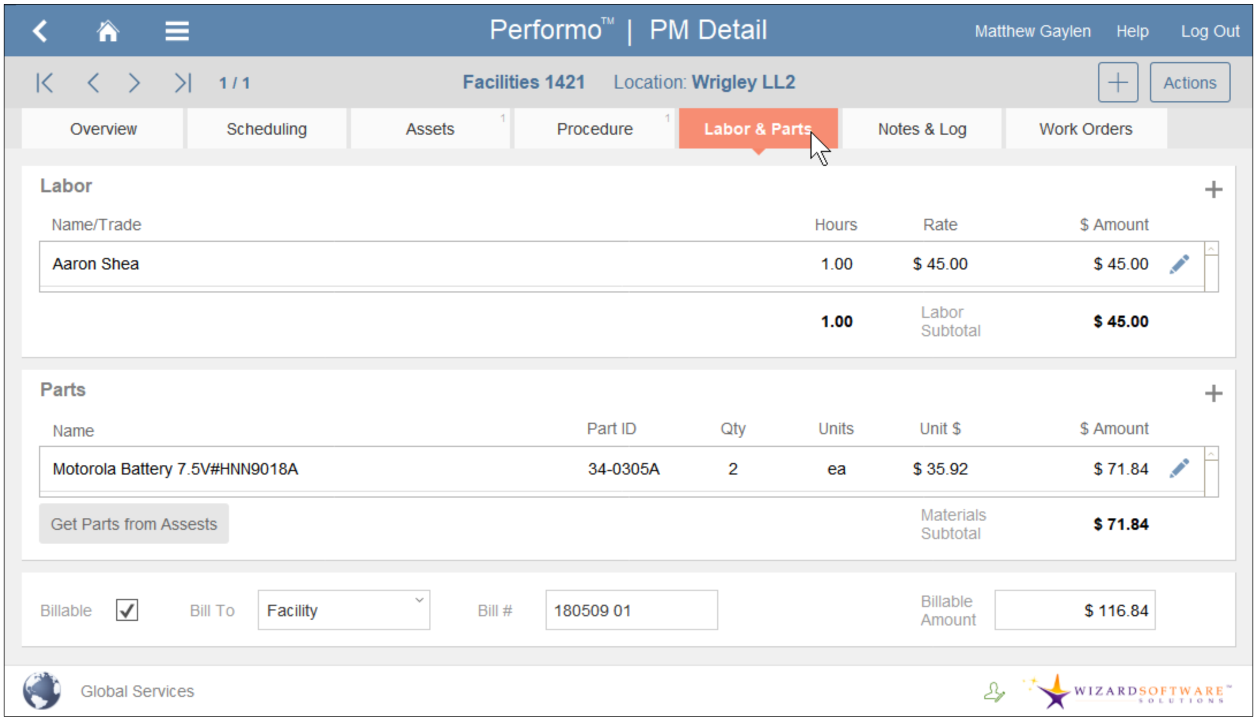


Figure 147 PM Detail View - Labor & Parts Tab

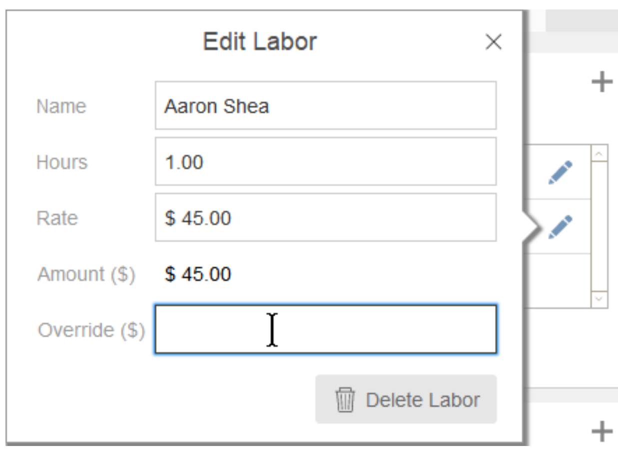


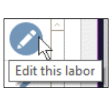
Figure 146 Edit Labor Data Entry Window

Click the **LABOR & PARTS** tab. Performo automatically displays estimated, or allowable time and materials for the work order to be created from the PM Schedule.

CREATE NEW LABOR ENTRY

Click the **+** button above the Labor portal. Performo displays the Edit Labor data entry window. Click to display the worker value list. Type-ahead is active. Begin typing to navigate to value to be seleted.

Enter the hours to be estimated on created work orders. The rate is automatically imported from the Workers module – if it has been entered in the worker record. The Amount is automatically calculated. Enter an amount in the Override ($) field and Performo will disregard Hours, Rate, and Amount. Work orders will be billed at the override amount.



Click the pencil icon to edit the labor entry. Click the **DELETE LABOR** button and Performo will remove the record from the portal.

CREATE NEW PARTS ENTRY

Click the **+** button above the Parts portal. Performo displays the Edit Part data entry window.

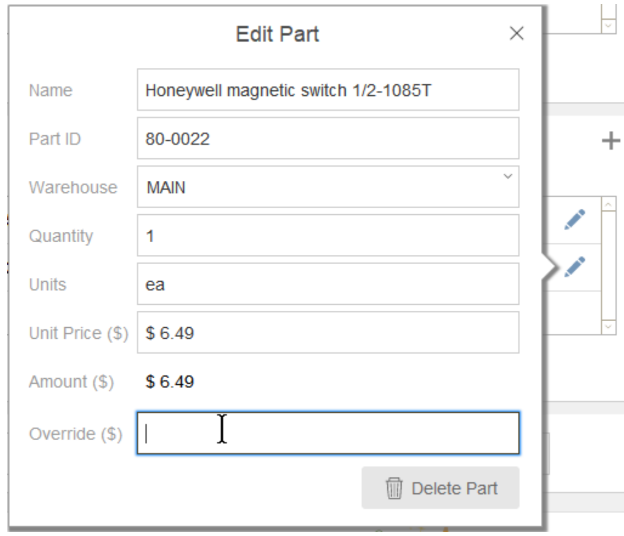


Figure 148 Edit Part Data Entry Window

Click the Name field. Performo displays the value list of parts. Use Type-ahead to find and select the part needed.

Click to choose the warehouse from which to get the part. The Solution Admin controls the Warehouse value list via the Parts module.

Enter the quantity needed to complete the work order. Units is automatically displayed from the Parts module as is the Unit Price ($). The Amount ($) is also automatically calculated and displayed. Enter an amount in the Override ($) field and Performo will disregard Hours, Rate, and Amount. Work orders will be billed at the override amount.

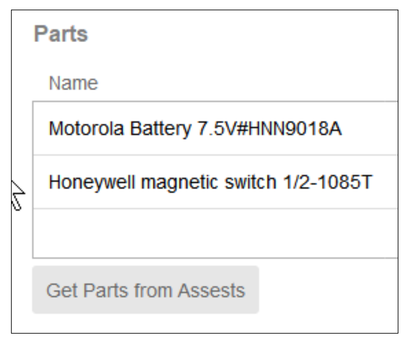


Figure 149 Get Parts from Assets

Click the pencil icon to edit the part entry. Click the **DELETE PART** button – Figure 149 – and Performo will remove the record from the portal.

Click the **GET PARTS FROM ASSETS** button. Any parts previously related to the asset will be added to the Parts portal.

Click the **BILL TO** field. Performo displays the value list. The value list is user definable. Any entity may be billed. Consult with the Solution Admin prior to changing values using the **EDIT…** button. The Bill # field is user definable. Any value may be entered.

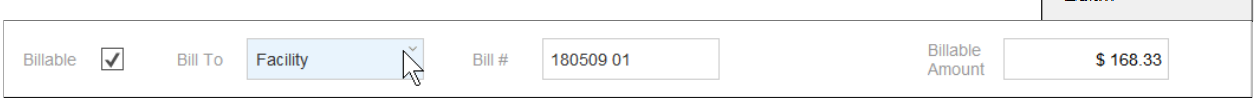


Figure 150 Billable section of the Labor & Parts tab – Bill To value list shown at right…

▷Video **PM Detail View – Notes & Log**

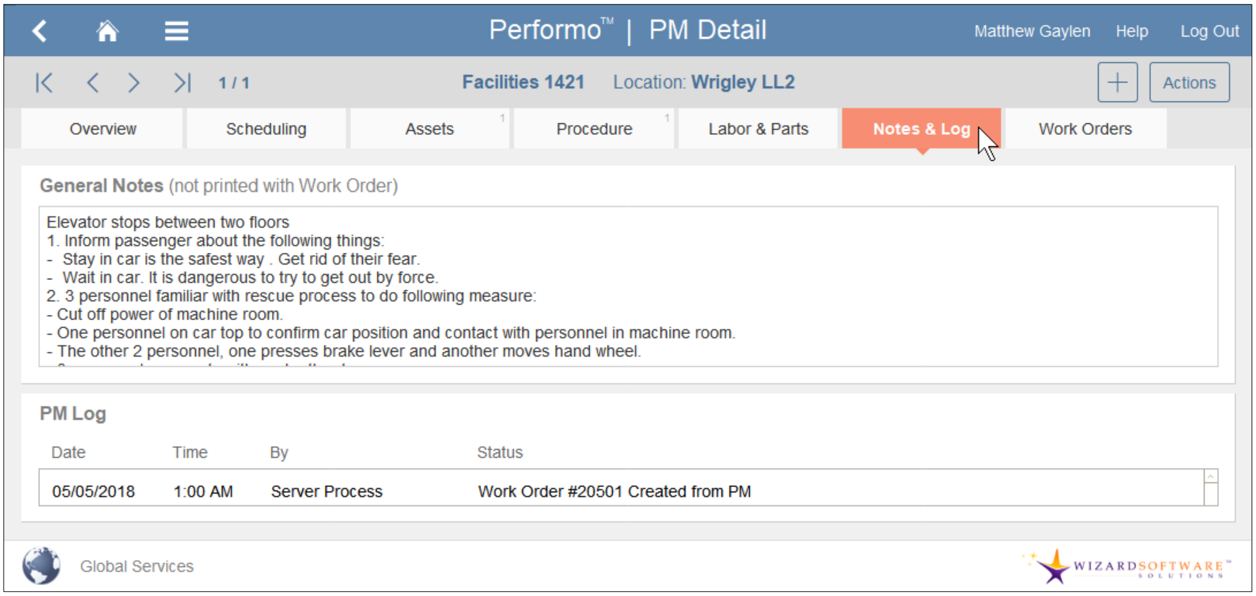


Figure 151 Notes & Log

The General Notes Field is a user-definable text field. Any text may be entered.

The PM Log is automatically calculated. Performo displays when work orders were created, and when they were manually or automatically skipped.

PM Detail View – Work Orders Tab

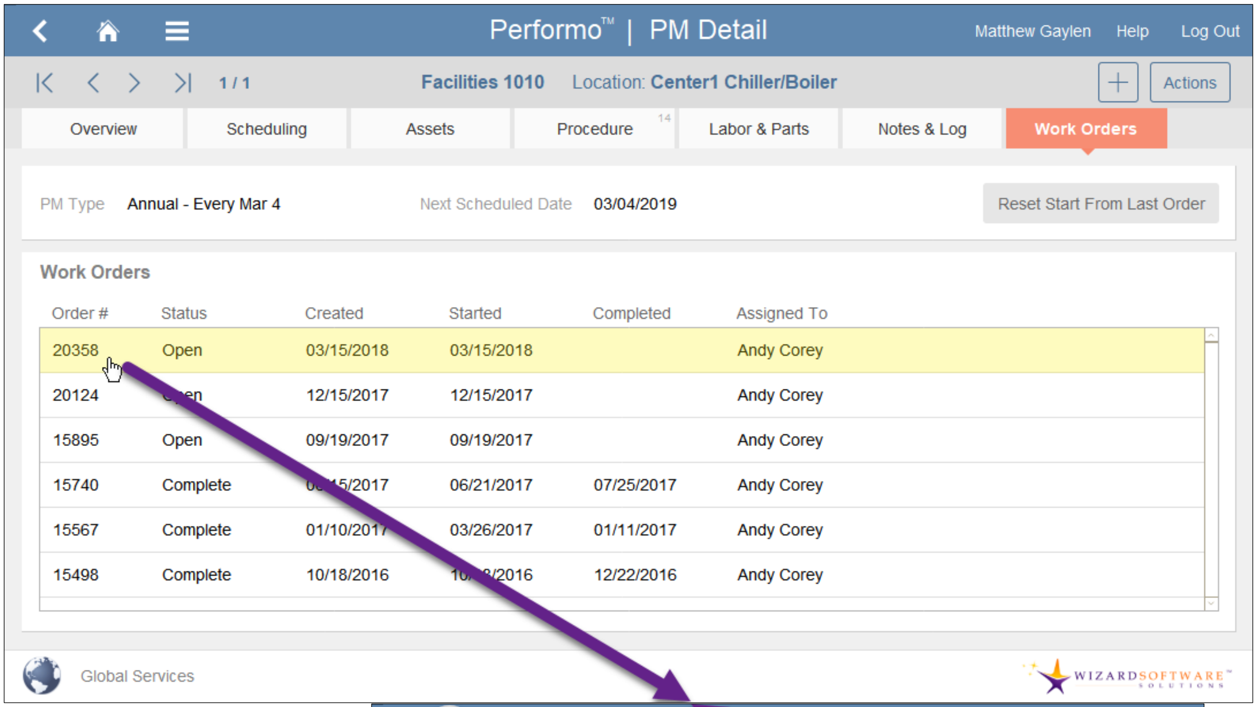


Figure 153 Work Orders Tab

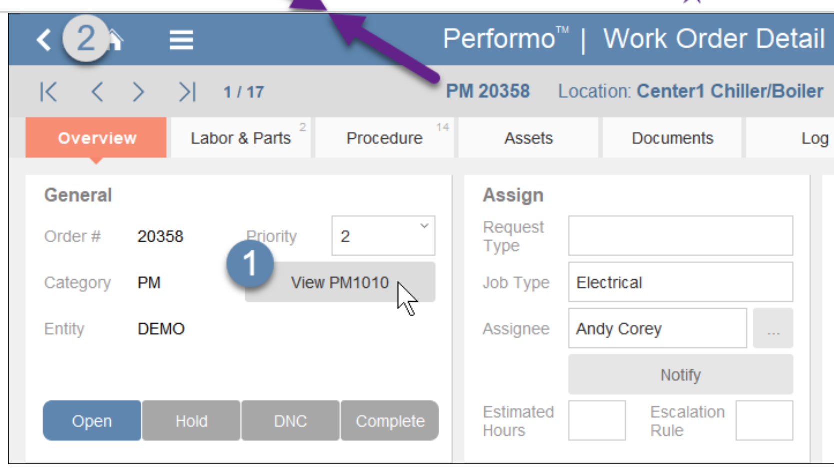


Figure 152 Navigate from the Work Order back to the PM Schedule

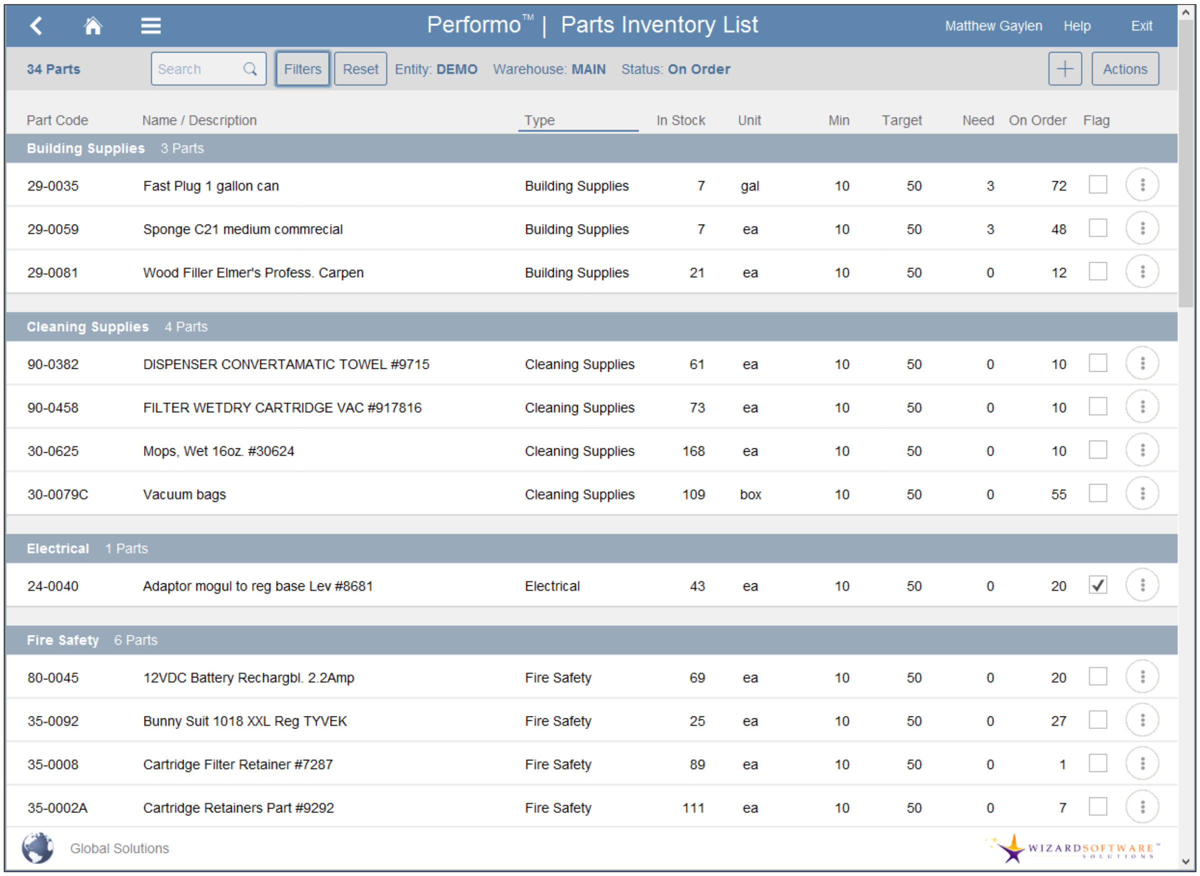
Click the **WORK ORDERS** tab of the PM Detail view. Performo displays all the work orders having been created from the PM Schedule. Click anywhere on any record. Performo navigates to the work order module and displays the Work Order Detail view.

There are two ways to navigate back to the PM Schedule from the work order detail view.

1) Click the **VIEW PM<###>** button.
2) Click the **BACK** button.

▷Video **PM Detail View – Actions Menu**

Parts Inventory Module



Performo™ | Parts Inventory List — Matthew Gaylen — Help — Exit

34 Parts — Search — Filters — Reset — Entity: DEMO — Warehouse: MAIN — Status: On Order — Actions

Part Code	Name / Description	Type	In Stock	Unit	Min	Target	Need	On Order	Flag
Building Supplies 3 Parts									
29-0035	Fast Plug 1 gallon can	Building Supplies	7	gal	10	50	3	72	☐
29-0059	Sponge C21 medium commrecial	Building Supplies	7	ea	10	50	3	48	☐
29-0081	Wood Filler Elmer's Profess. Carpen	Building Supplies	21	ea	10	50	0	12	☐
Cleaning Supplies 4 Parts									
90-0382	DISPENSER CONVERTAMATIC TOWEL #9715	Cleaning Supplies	61	ea	10	50	0	10	☐
90-0458	FILTER WETDRY CARTRIDGE VAC #917816	Cleaning Supplies	73	ea	10	50	0	10	☐
30-0625	Mops, Wet 16oz. #30624	Cleaning Supplies	168	ea	10	50	0	10	☐
30-0079C	Vacuum bags	Cleaning Supplies	109	box	10	50	0	55	☐
Electrical 1 Parts									
24-0040	Adaptor mogul to reg base Lev #8681	Electrical	43	ea	10	50	0	20	☑
Fire Safety 6 Parts									
80-0045	12VDC Battery Rechargbl. 2.2Amp	Fire Safety	69	ea	10	50	0	20	☐
35-0092	Bunny Suit 1018 XXL Reg TYVEK	Fire Safety	25	ea	10	50	0	27	☐
35-0008	Cartridge Filter Retainer #7287	Fire Safety	89	ea	10	50	0	1	☐
35-0002A	Cartridge Retainers Part #9292	Fire Safety	111	ea	10	50	0	7	☐

Global Solutions

Figure 154 Parts Inventory List view

▷Video **Parts Inventory List View**

Although, maintaining in-house inventory helps companies respond quickly to work orders, one of the most important benefits is reducing downtime for assets. In some cases, this can even be a matter of health and safety. However, there is a delicate balance between having parts in stock and hoarding. Issues include costs of storage space, personnel, loss, deterioration, and obsolescence. Additionally, on-premise inventory ties up capital. Performo's Parts and Inventory module mitigates cost, expedites fulfillment, reduces excess, and keeps critical systems up and running.

From the Main Menu of Performo's Home Screen, click the **PARTS INVENTORY** button. Performo displays the Parts Inventory List view. Click the column heading to sort by that value. Where it makes sense, Performo will subsort the list by that column heading and display the number of items in that category.

Actions On The Parts Inventory List

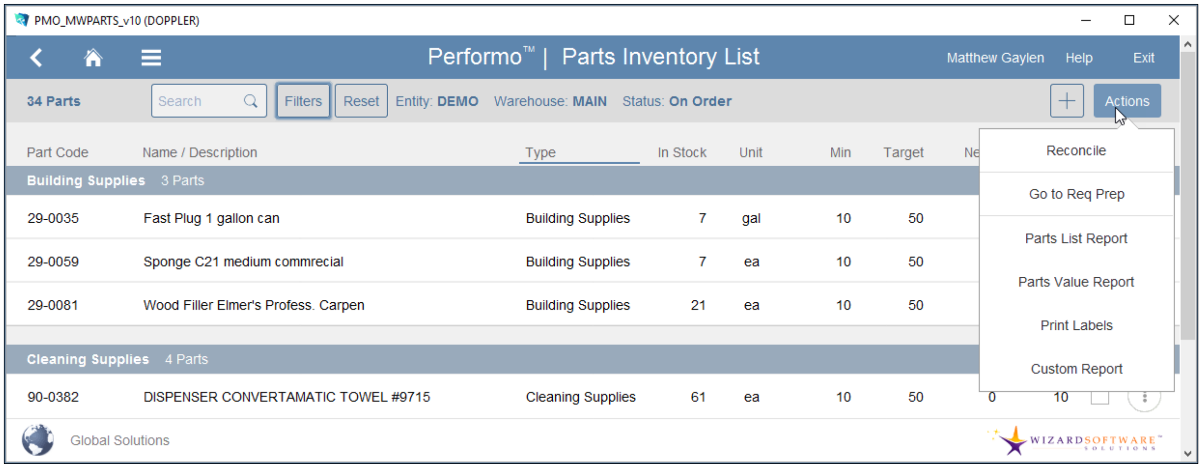


Figure 155 Actions on the Parts Inventory List view

Actions on the Parts Inventory List include Reconcile, Go to Req Prep, Parts List Report, Parts Value Report, Print Labels, Custom Report.

Each of these options will be discussed subsequently in this user reference guide.

Click any part to view the detail for that record.

Click the + button on the Actions Menu to create a new part record from the detail view.

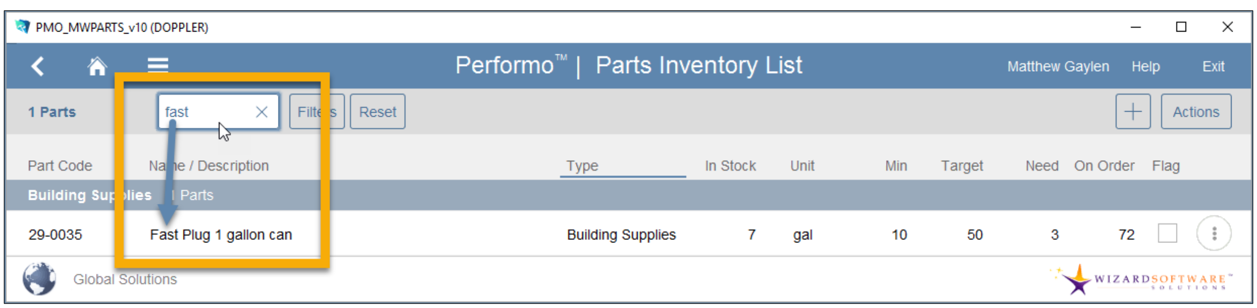


Figure 156 Global Search

Enter text in the **GLOBAL SEARCH** field. Performo displays records with data that matches that value. Click the **FILTERS** button to choose values in specific fields. Performo displays all records with that value in that field.

Click the **RESET** button to return to the default found set.

▷Video

PARTS INVENTORY ACTIONS MENU – RECONCILE

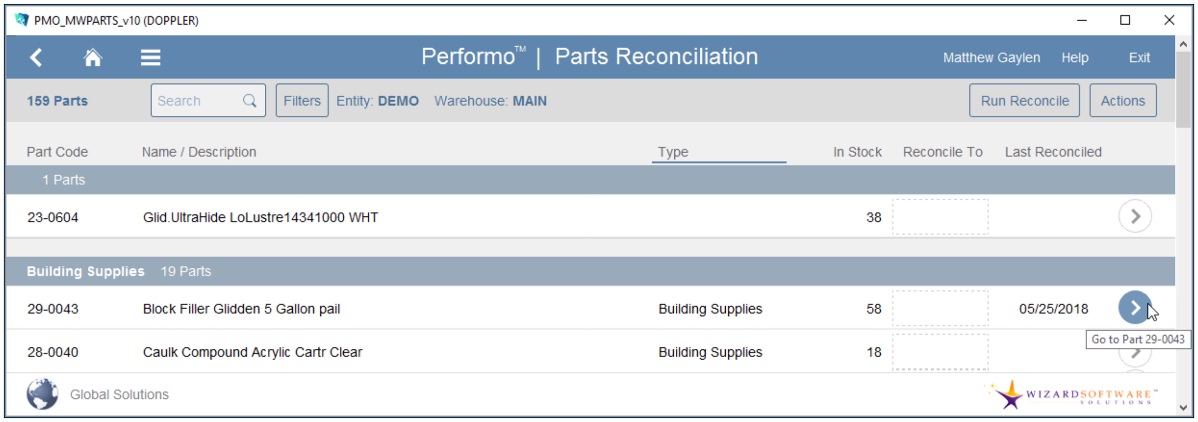


Figure 157 Parts Reconciliation (couple's counseling not required)

Click the **RECONCILE** option of the Actions Menu on the Actions bar of the Parts Inventory List view. Performo displays the Parts Reconciliation screen.

Parts reconciliation is where the actual number of items in the bin, on the shelf, and on the truck are counted and compared to the number Performo calculated to be in stock.

The Parts Reconciliation screen displays columns for Part Code, Name/Description, type, the number In Stock, the number to Reconcile to, and the date the part was Last Reconciled.

Best practice is to use the **GLOBAL SEARCH** field or the **FILTERS** button to create a found set of parts to work with. Smaller batches of parts will be easier to reconcile.

Once a found set has been created, and the number of the part has been physically counted, enter that number in the Reconcile To field. When necessary, for reference, click the **GO TO PART** button on the far, right side of the row to view details about that part on the Part Detail screen. On the Part Detail screen, click the **BACK** button to return to Parts Reconciliation.

PARTS RECONCILIATION - RUN RECONCILE BUTTON

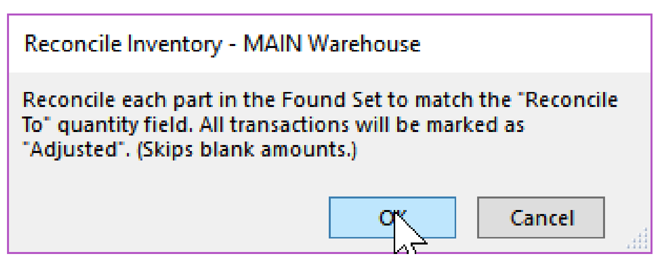


Figure 158 Reconcile Inventory <Name of> Warehouse

Click the **RUN RECONCILE** button. Performo creates a transaction to add or deduct the quantity previously calculated to match the quantity physically counted. The transactions will be marked as Adjustments on the Transactions tab of the Part Detail view. The date of the reconciliation is automatically entered into the Last Reconciled field.

PARTS RECONCILIATION ACTIONS MENU – RECALCULATE IN STOCK

Click the **ACTIONS MENU** button on the Actions Bar of the Parts Reconciliation screen. Click the **RECALCULATE IN STOCK** option. Performo displays the Recalculate In Stock dialog box.

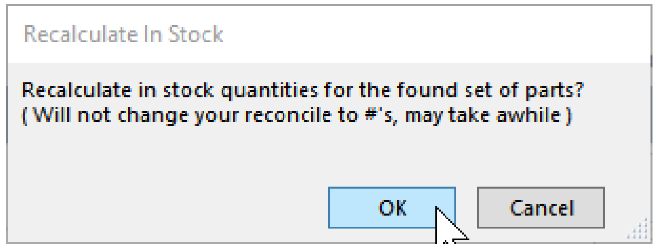


Figure 159 Recalculate In Stock dialog box

Click the **OK** button. Performo will recalculate in stock quantities for the found set of parts.

Note: both numbers are shown on the warehouse tab of part detail screen. The In Stock number should "always" be correct automatically, but it is possible that it is not, so this function can be used as a failsafe to ensure its correctness before reconciling.

Also note that the Performo will not change the Reconcile To numbers. So, if parts have been manually added on the Transactions tab of the Parts Detail screen during the inventory process, then, the Reconcile To field will also have to be manually adjusted on the Parts Reconciliation screen.

PARTS RECONCILIATION ACTIONS MENU – RESET RECONCILE TO

Click the **ACTIONS MENU** button on the Actions Bar of the Parts Reconciliation screen. Click the **RESET RECONCILE TO** option. Performo sets the Reconcile To column equal to the In-Stock column. This is a shortcut that assumes that the In-Stock number is mostly correct. This can be a dangerous assumption if great care has not been taken maintaining inventory numbers. Many companies, corporations and institutions disable this function. This forces the inventory team to physically count and enter every number. Contact the Solution Admin if this option pertains.

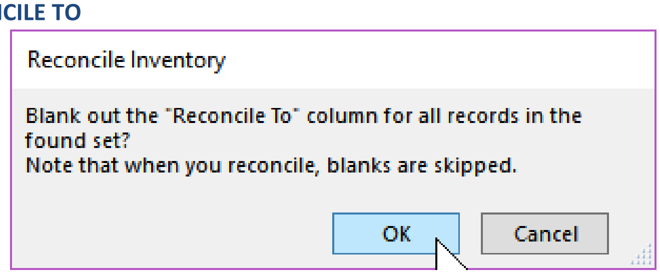


Figure 160 Reconcile Inventory dialog box

▷Video [PARTS INVENTORY ACTIONS MENU – GO TO REQ PREP](#)

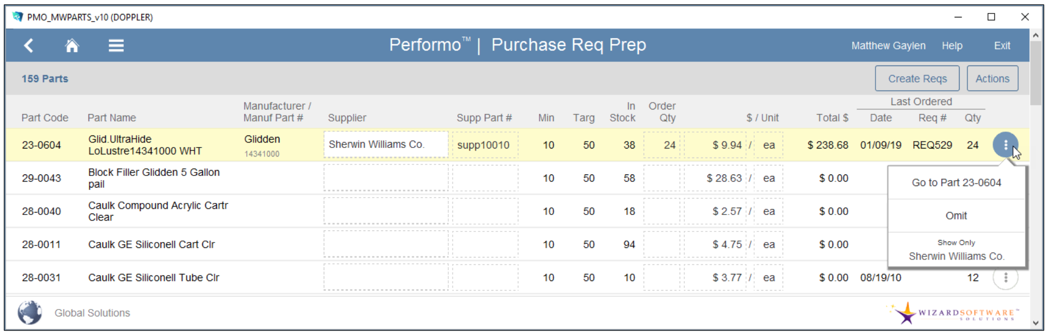


Figure 161 Purchase Req Prep screen

Click the **ACTIONS MENU** button on the Actions Bar of the Parts Inventory screen. Click the **GO TO REQ PREP** option. Performo displays the Purchase Req Prep screen. Note: best practice is to create a found set of parts prior to navigating to Req Prep. This can be done using the Global Search field or the Filters button on the Parts Inventory List, or by using the **FLAG** checkbox on the Overview tab of the Part Detail view.

Performo displays the Purchase Req Prep screen. Columns on the list view are: Part Code, Part Name, Manufacturer/Part #, Supplier, Supplier Part #, Trigger quantity, Target quantity, In Stock quantity, Order Quantity, dollar amount and Unit, Total dollars, as well as, Last Ordered, Date, Requisition Number, and Quantity.

Part Code, Part Name, Manufacturer and Part number; as well as Triger, Target, and In Stock quantities are automatically calculated and displayed. Additionally, if there was a previous order, the date, REQ number and the quantity will also appear. Users will interact with this screen by entering or editing the Supplier, Supplier Part number, the Order Quantity, the Cost, and Units.

Click the **RECORD MENU** button. Options include, Go to Part, Omit, and Show only. Click **OMIT** if the part is not to be ordered at the moment. Click **GO TO PART** to reference data and information about the part prior to ordering. Click **SHOW ONLY** to focus on one Requisition at a time.

Click the **CREATE REQS** button. Performo creates the order forms and navigates to the Purchase Requisition List view.

Note: Click the **ACTIONS MENU** button on the Actions Bar of the Purchase Req Prep screen. Option two on that value list is to click **GO TO REQUISITION LIST**.

Purchase Requisition List

Figure 162 Purchase Requisition List View

[See also Page #135] The Purchase Requisition List view displays the Req #, The Entity, Date, Vendor, number of Items, Total Dollars and Status of each Requisition. Click the **GLOBAL SEARCH** field or use the **FILTERS** button to create a found set of Purchase Requisitions to investigate, analyze or manage.

Purchase Requisitions are also discussed on page #134 & page #135.

Click any Purchase Requisition record. Performo displays the Purchase Requisition screen.

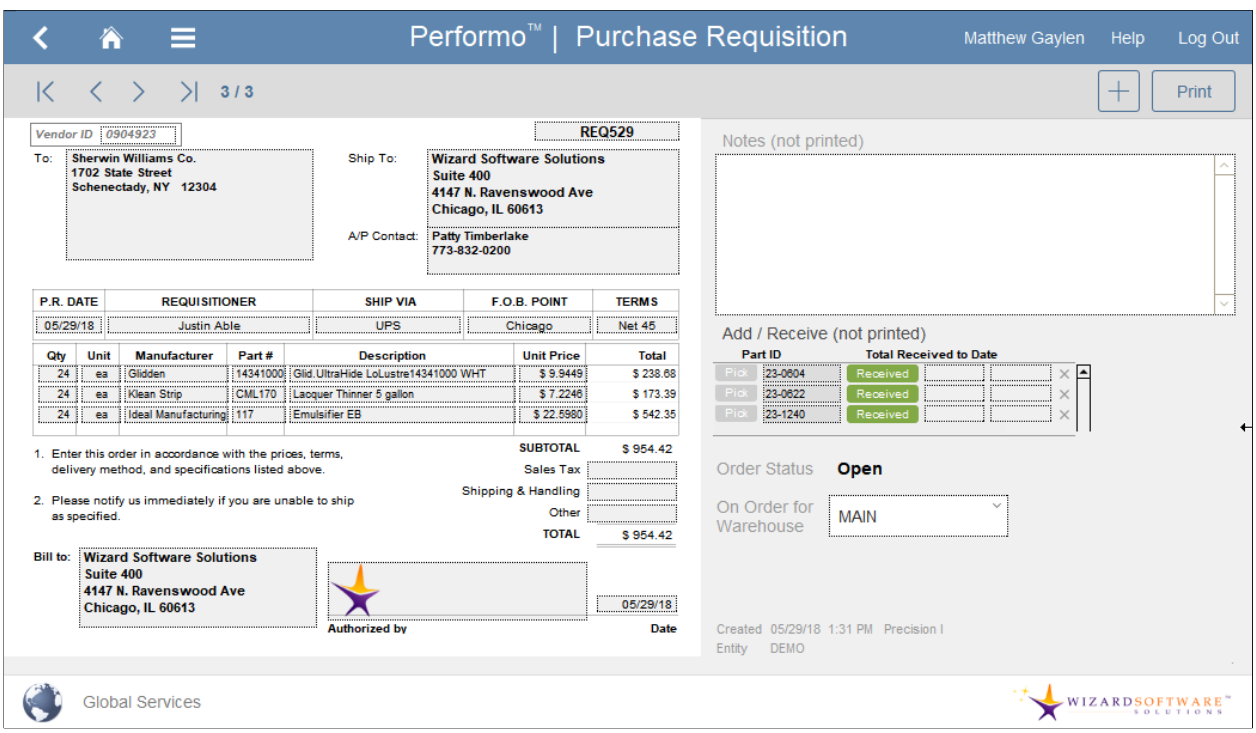
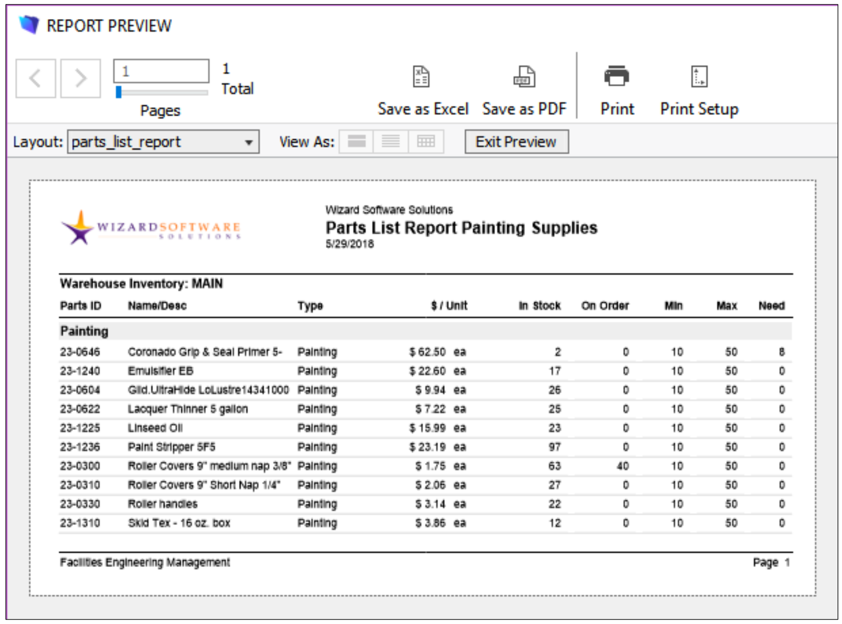


Figure 163 Purchase Requisition Screen

PARTS INVENTORY ACTIONS MENU – PARTS LIST REPORT

Click **PARTS LIST REPORT** option on the Actions Menu. Performo displays the Edit Report Title dialog box. Enter a custom one-time report title if necessary and Click the **OK** button to proceed. Performo displays the Report Preview. The report contains one line item for each part in the found set.

The report displays the Parts ID number, the Name and Description, the Type, the dollars and the unit, the In Stock quantity, the quantity on order, the threshold Minimum quantity, the target maximum, and the number of items needed to reach safe stock target quantity. Contact the Solution Admin if additional columns are necessary or if columns are not needed.



Parts ID	Name/Desc	Type	$ / Unit		In Stock	On Order	Min	Max	Need
Painting									
23-0646	Coronado Grip & Seal Primer 5-	Painting	$ 62.50	ea	2	0	10	50	8
23-1240	Emulsifier EB	Painting	$ 22.60	ea	17	0	10	50	0
23-0604	Gild.UltraHide LoLustre14341000	Painting	$ 9.94	ea	26	0	10	50	0
23-0622	Lacquer Thinner 5 gallon	Painting	$ 7.22	ea	25	0	10	50	0
23-1225	Linseed Oil	Painting	$ 15.99	ea	23	0	10	50	0
23-1236	Paint Stripper 5F5	Painting	$ 23.19	ea	97	0	10	50	0
23-0300	Roller Covers 9" medium nap 3/8"	Painting	$ 1.75	ea	63	40	10	50	0
23-0310	Roller Covers 9" Short Nap 1/4"	Painting	$ 2.06	ea	27	0	10	50	0
23-0330	Roller handles	Painting	$ 3.14	ea	22	0	10	50	0
23-1310	Skid Tex - 16 oz. box	Painting	$ 3.86	ea	12	0	10	50	0

Figure 164 Parts List Report Preview

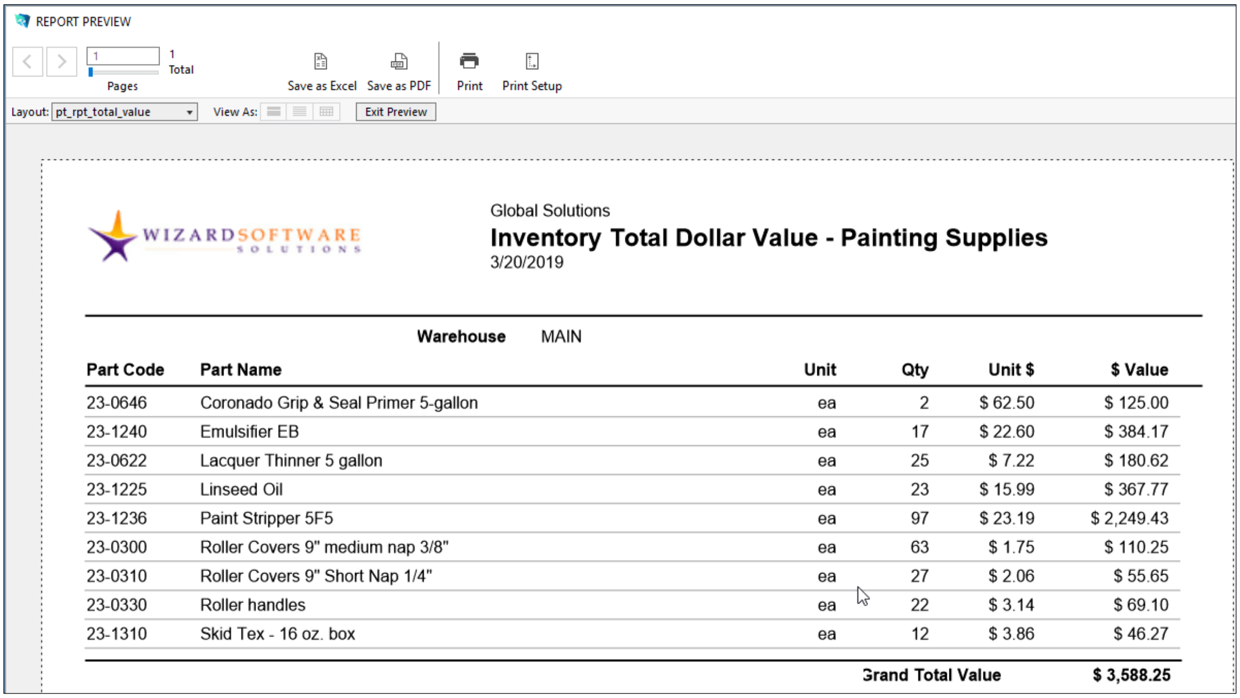
Click **SAVE AS PDF**. Performo displays the operating system's Save As dialog box. Navigate to any accessible directory to save.

Click **PRINT SETUP**. Performo displays the operating system dialog.

Click the **PRINT** button. Performo displays the operating system dialog box for that printer.

If the report is multiple pages, click the **FORWARD** and **BACK** buttons to navigate to previous or succeeding pages.

PARTS INVENTORY ACTIONS MENU – PARTS VALUE REPORT



Global Solutions
Inventory Total Dollar Value - Painting Supplies
3/20/2019

Warehouse MAIN

Part Code	Part Name	Unit	Qty	Unit $	$ Value
23-0646	Coronado Grip & Seal Primer 5-gallon	ea	2	$ 62.50	$ 125.00
23-1240	Emulsifier EB	ea	17	$ 22.60	$ 384.17
23-0622	Lacquer Thinner 5 gallon	ea	25	$ 7.22	$ 180.62
23-1225	Linseed Oil	ea	23	$ 15.99	$ 367.77
23-1236	Paint Stripper 5F5	ea	97	$ 23.19	$ 2,249.43
23-0300	Roller Covers 9" medium nap 3/8"	ea	63	$ 1.75	$ 110.25
23-0310	Roller Covers 9" Short Nap 1/4"	ea	27	$ 2.06	$ 55.65
23-0330	Roller handles	ea	22	$ 3.14	$ 69.10
23-1310	Skid Tex - 16 oz. box	ea	12	$ 3.86	$ 46.27
				Grand Total Value	**$ 3,588.25**

Figure 165 Inventory Total Dollar Value - found set

Click the **PARTS VALUE REPORT** option on the Actions Menu. Performo displays the Edit Report Title dialog box. Enter a custom one-time report title if necessary and then, Click the **OK** button to proceed. Performo displays the Report Preview. The report contains one line item for each part in the found set. The report displays the Parts ID number, the Name, Unit type, quantity in stock, unit cost, and total value. The grand total appears at the bottom of the last page. Contact the Solution Admin if additional columns are necessary or if columns are not needed.

Click **SAVE AS PDF**. Performo displays the operating system's Save As dialog box. Navigate to any accessible directory to save. Click **PRINT SETUP**. Performo displays the operating system dialog.

Click the **PRINT** button. Performo displays the operating system dialog box for that printer.

If the report is multiple pages, click the **FORWARD** and **BACK** buttons to navigate to previous or succeeding pages.

PARTS INVENTORY ACTIONS MENU – PRINT LABELS

Click the **PRINT LABELS** option on the Actions Menu. Performo displays the Print Bar Code Labels dialog box.

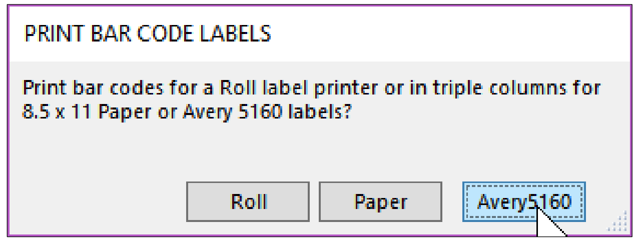


Figure 166 Print Bar Code Labels

Since this is a function that must be customized to each solution; the Solution Admin and the Wizard Software Project Engineering team will work together to implement bar code labelling.

At the time that bar code printing is necessary, standard options include, Roll bar codes, Paper bar codes, and bar codes printed using the Avery5160 template.

Click **SAVE AS PDF**. Performo displays the operating system's Save As dialog box. Navigate to any accessible directory to save.

Click **PRINT SETUP**. Performo displays the operating system dialog.

Click the **PRINT** button. Performo displays the operating system dialog box for that printer.

If the report is multiple pages, click the **FORWARD** and **BACK** buttons to navigate to previous or succeeding pages.

Click the **EXIT PREVIEW** button to return to the Parts Inventory List view.

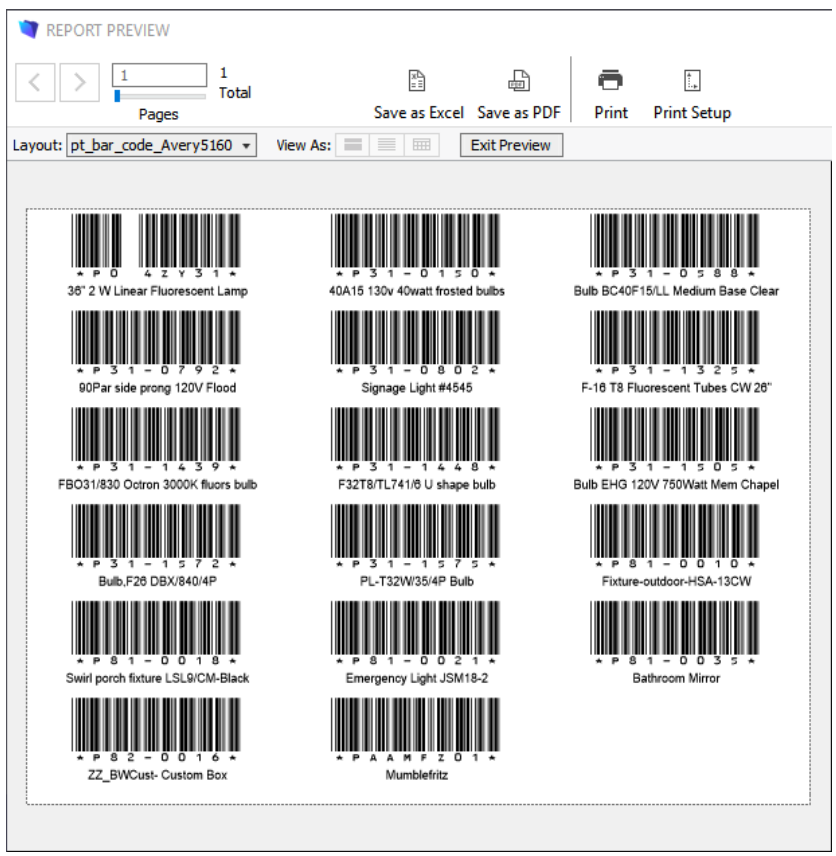


Figure 167 Bar Code Labels on Avery 5160 Template

CUSTOM REPORT

Click the **CUSTOM REPORT** option on the Actions Menu. Performo displays the Run Custom Report pop-up window. Standard options include 25YF Parts, Parts Export, YF Mar Parts 1, YF Parts 1. Click the **EXCEL** button to proceed. Performo opens the operating system Save As dialog box. Choose any accessible directory and click **OK** to proceed.

When the operation is completed; Performo displays the Report Saved dialog box. The dialog box shows the directory where the report was saved. Click the **OK** button to proceed.

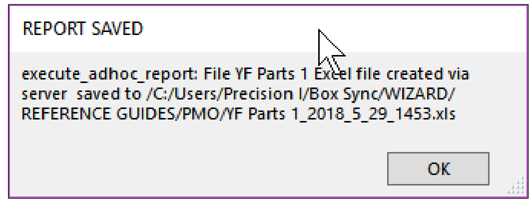
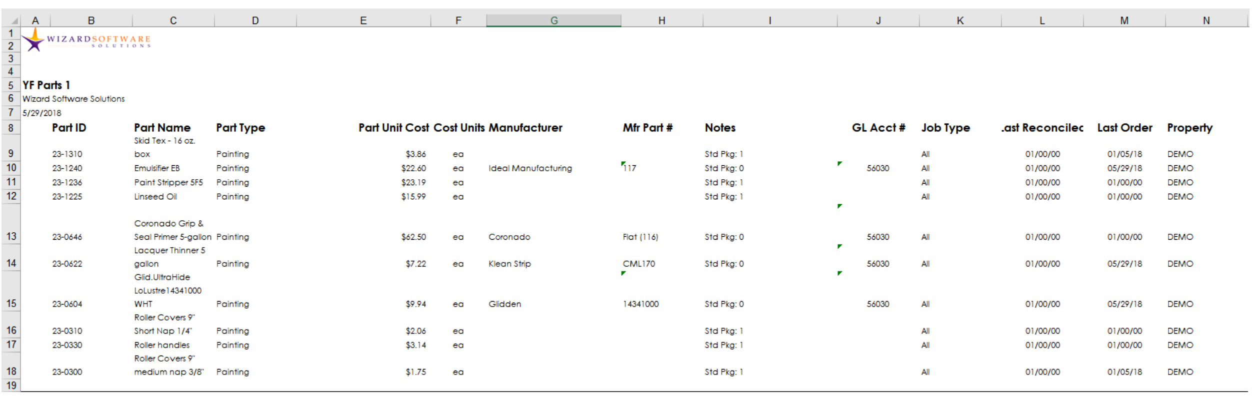


Figure 168 Report Saved Dialog box

Performo automatically opens the Microsoft Excel workbook containing the saved spreadsheet. The Solution Admin can work with the Wizard Software Project Engineering team to fine-tune and create custom parts reports.



YF Parts 1
Wizard Software Solutions
5/29/2018

Part ID	Part Name	Part Type	Part Unit Cost	Cost Units	Manufacturer	Mfr Part #	Notes	GL Acct #	Job Type	.ast Reconcilec	Last Order	Property
23-1310	Skid Tex - 16 oz. box	Painting	$3.86	ea			Std Pkg: 1		All	01/00/00	01/05/18	DEMO
23-1240	Emulsifier EB	Painting	$22.60	ea	Ideal Manufacturing	117	Std Pkg: 0	56030	All	01/00/00	05/29/18	DEMO
23-1236	Paint Stripper 5F5	Painting	$23.19	ea			Std Pkg: 1		All	01/00/00	01/00/00	DEMO
23-1225	Linseed Oil	Painting	$15.99	ea			Std Pkg: 1		All	01/00/00	01/00/00	DEMO
23-0646	Coronado Grip & Seal Primer 5-gallon	Painting	$62.50	ea	Coronado	Flat (116)	Std Pkg: 0	56030	All	01/00/00	01/00/00	DEMO
23-0622	Lacquer Thinner 5 gallon	Painting	$7.22	ea	Klean Strip	CML170	Std Pkg: 0	56030	All	01/00/00	05/29/18	DEMO
23-0604	Glid.UltraHide LoLustre14341000 WHT	Painting	$9.94	ea	Glidden	14341000	Std Pkg: 0	56030	All	01/00/00	05/29/18	DEMO
23-0310	Roller Covers 9" Short Nap 1/4"	Painting	$2.06	ea			Std Pkg: 1		All	01/00/00	01/00/00	DEMO
23-0330	Roller handles	Painting	$3.14	ea			Std Pkg: 1		All	01/00/00	01/00/00	DEMO
23-0300	Roller Covers 9" medium nap 3/8"	Painting	$1.75	ea			Std Pkg: 1		All	01/00/00	01/05/18	DEMO

Figure 169 Custom Report opened in Microsoft Excel

Part Detail

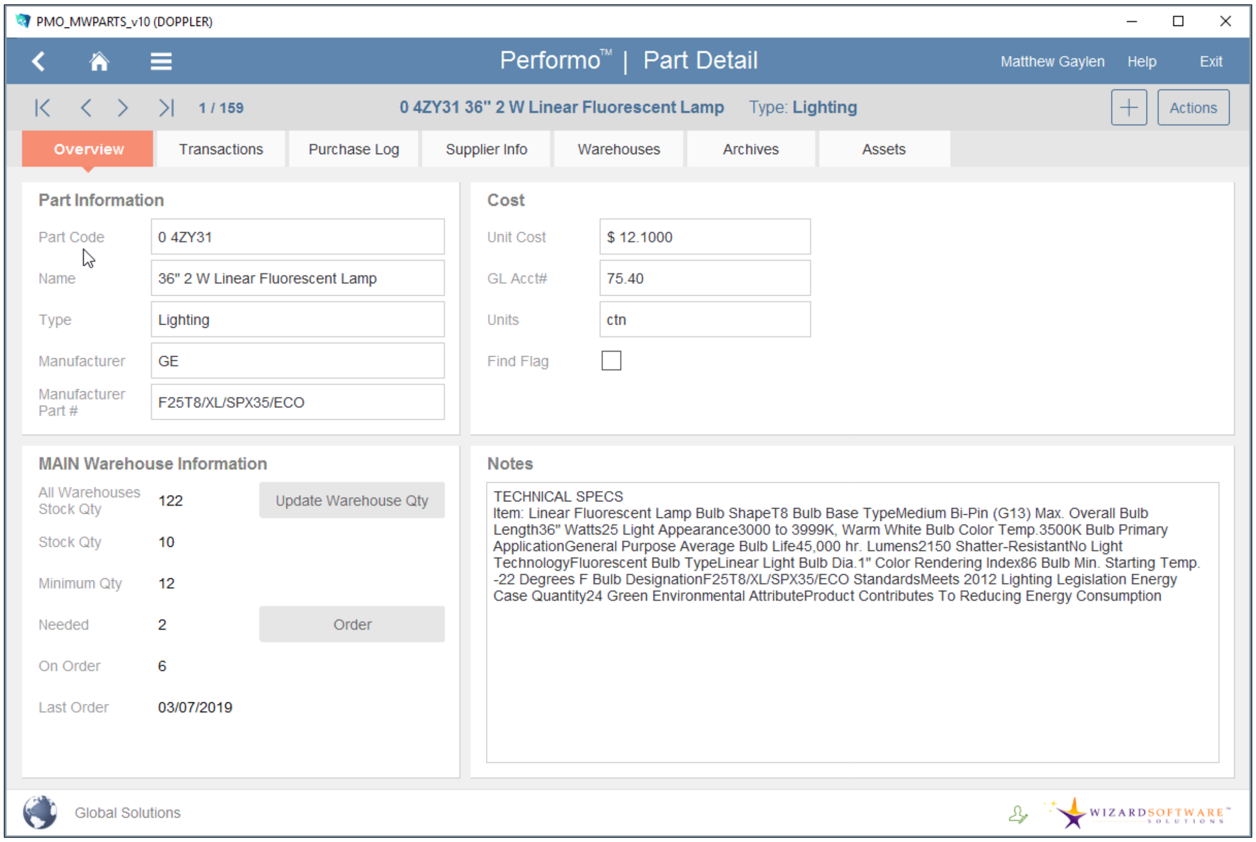


Figure 170 Part Detail

The part detail view is divided into seven tabs. Tabs include Overview, Transactions, The Purchase Log, Supplier Info, Warehouses, Archives, and Assets.

▷Video

PART DETAIL – OVERVIEW TAB

The overview tab is divided into four sections. Parts Information, < name> Warehouse Information, Cost, Notes.

The Part Information section includes fields for Part Code, Name, Type, Manufacturer, and Manufacturer Part Number.

The *<Name>* Warehouse Information section includes fields for All Warehouses Stock Quantity, Stock Quantity, Minimum Quantity Needed, On Order, Last Order. Performo calculates these fields automatically. Click the **UPDATE WAREHOUSE QTY** button to redo the calculation.

ORDER BUTTON

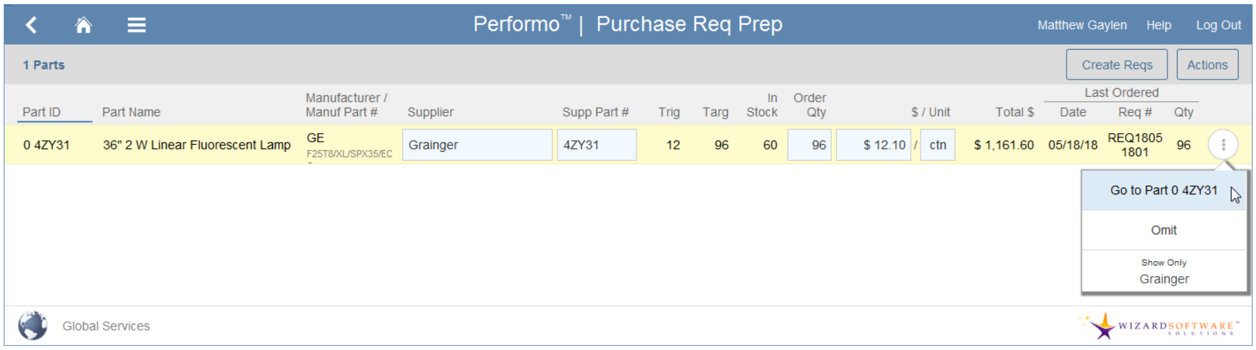


Figure 171 Order Parts

Click the **ORDER** button. Performo navigates to the Purchase Req Prep view. Purchase requisition preparation will be discussed in a subsequent section of this user reference guide.

Click the **RECORDS MENU** on the Purchase Req Prep view and choose the Go To Part <###> option to return to the Part Detail view.

COST

The Cost section includes fields for Unit Cost, GL Account #, Units, and a Find Flag checkbox.

Click the **FIND FLAG** checkbox. Control+click the **NAVIGATION MENU** button to return to list view. Click the **FILTERS** button. Performo displays the Part Filters data entry window.

Click the **FLAG** checkbox.

Click the **CLOSE** button on the Part Filters data entry window. Performo displays all the flagged parts. This is extremely useful for quickly finding parts that need to be tracked, managed or analyzed.

NOTES

The Notes field is user-definable. Any text may be entered or pasted into the Notes field.

▷Video **PART DETAIL – TRANSACTIONS TAB**

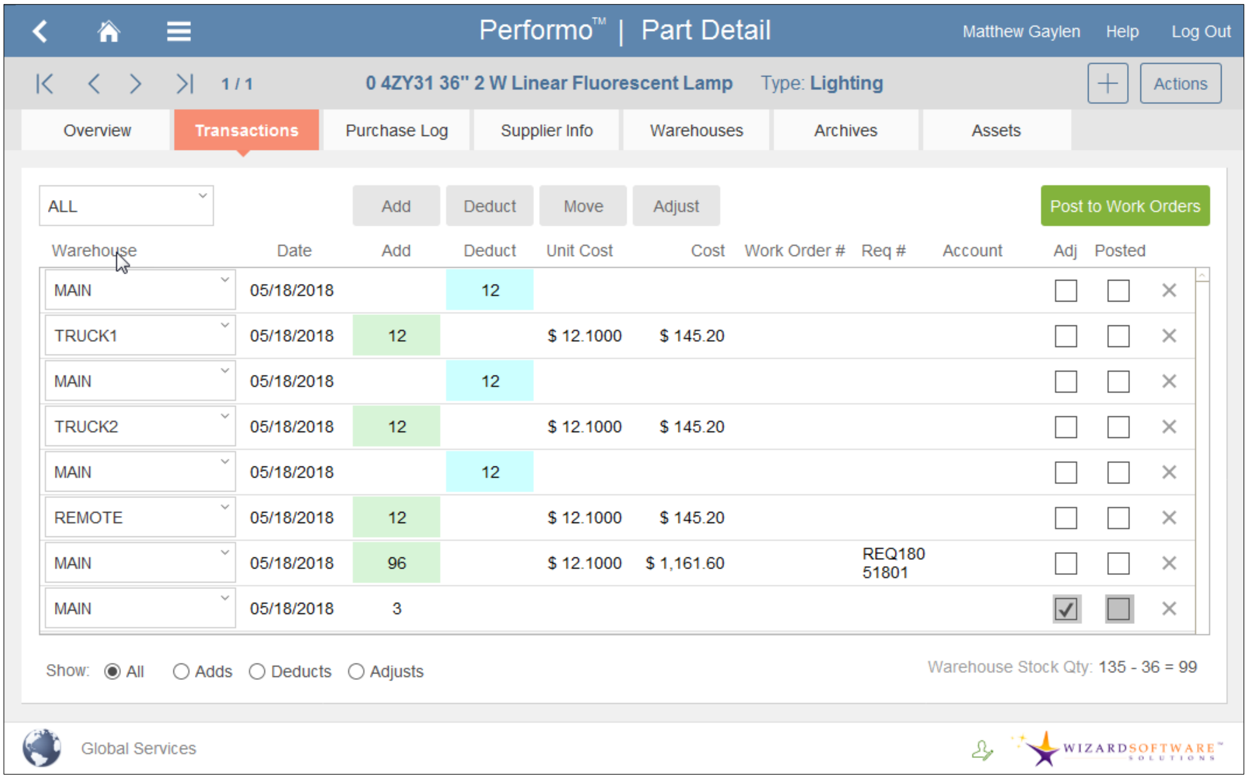


Figure 172 Transactions Tab of Part Detail view

The Transactions portal displays a list of all the additions, deductions, movements, and adjustments made to the part.

Click the **WAREHOUSE** value list above the portal. Choose a warehouse. Performo displays all the transactions involving that part in that warehouse. Please remember that warehouses can be closets, trucks, vans, storerooms, stockrooms or anywhere else where the company, corporation or institution stores parts or maintains inventory.

Each line of the portal displays one transaction. Transactions can be manually entered using the buttons above the portal. Transactions also appear automatically if posted from the Work Orders Module or if Received from a Purchase Requisition. Purchase Requisitions will be covered in a subsequent section of this user guide.

Each record in the portal displays the warehouse, the date, the unit cost, the total cost, the work order number, the requisition number, the account number, and checkboxes for Adjustment, and Posted. Click the **X** at the end of the row to delete the transaction. The fields are also user-definable in case if an entry needs to be edited.

TRANSACTIONS TAB – ADD BUTTON

Click the **ADD** button. Performo displays the Add To Inventory data entry window.

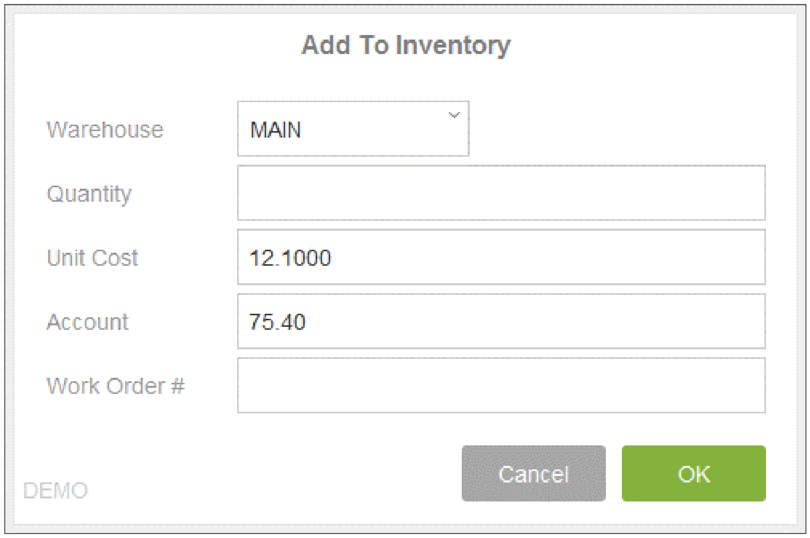


Figure 173 Add To Inventory data entry window

Choose a warehouse. Performo will add inventory to that warehouse. Indicate a quantity, cost data, and an account number if necessary.

Enter a work order number if a part is being returned to inventory after being unused on a completed work order.

Click the **OK** button to proceed or the **CANCEL** button to return to the Part Detail view.

TRANSACTION TAB NOTES

When a part is added to a work order or when a part is deducted from inventory on a work order; the transaction is entered into the COSTS table. Please note that a part entered on a work order does not have to be a part in the parts module. A part can be purchased on a one-time basis for a work order. Additionally, the Solution Admin can turn off the ability for engineers to interact with parts on a work order, so that all parts on work orders must be entered from the parts module by the stockroom dude.

When a part is added or deducted from inventory in the parts module; it is also recorded in the transactions table. Part transactions do not have to be related to a work order.

*All parts added to inventory are also recorded in the Transactions table. This occurs when the work order is completed or if the **UPDATE INVENTORY** button is clicked in the Work Order module.*

*When parts transactions are entered with a valid work order number, Performo also creates a parallel entry in the costs table. This occurs when the **POST TO WORK ORDERS** button is clicked.*

TRANSACTIONS TAB – DEDUCT BUTTON

Click the **DEDUCT** button. Performo displays the Deduct From Inventory data entry window. In the event, the engineers do not enter the part number on the completed work order, it can be entered on the Deduct From Inventory data entry window. Plan B is to click the **POST TO WORK ORDERS** button above the Transactions portal. Performo will display the Update Work Order Transactions dialog. Click **DONE** to proceed. Performo will then display the Part Detail view. Note that the Posted checkbox for the record is automatically checked.

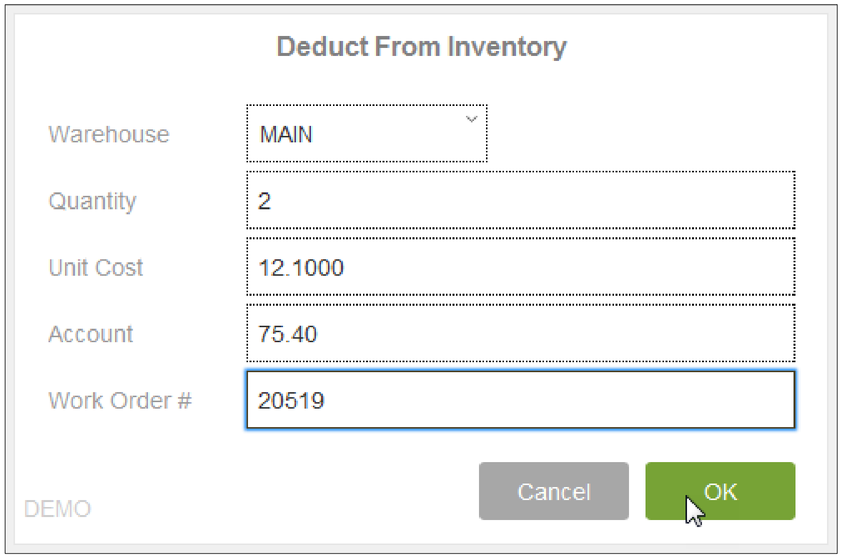
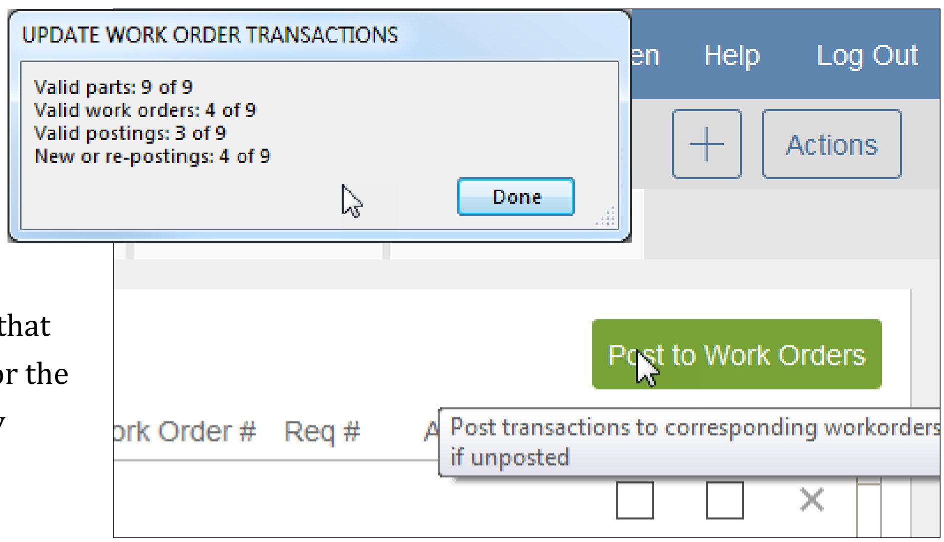


Figure 175 Deduct From Inventory – Data Entry Window



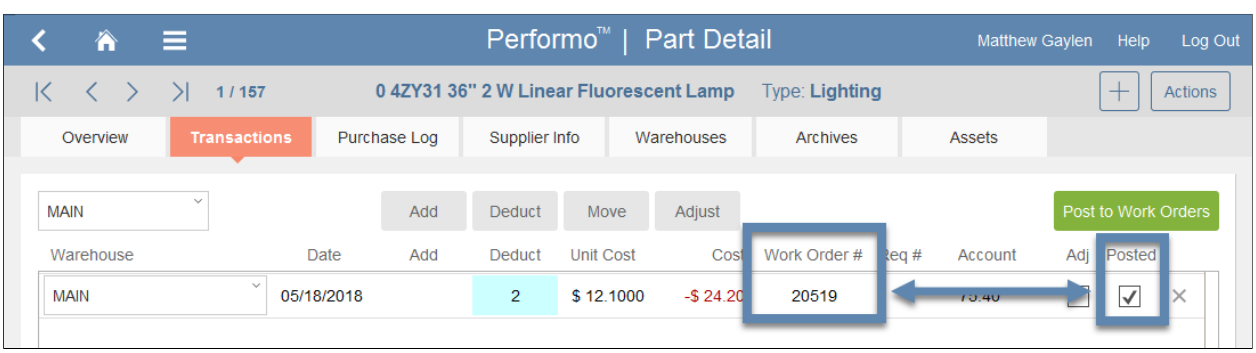


Figure 174 Post to Work Orders button

PART DETAIL – PURCHASE LOG TAB

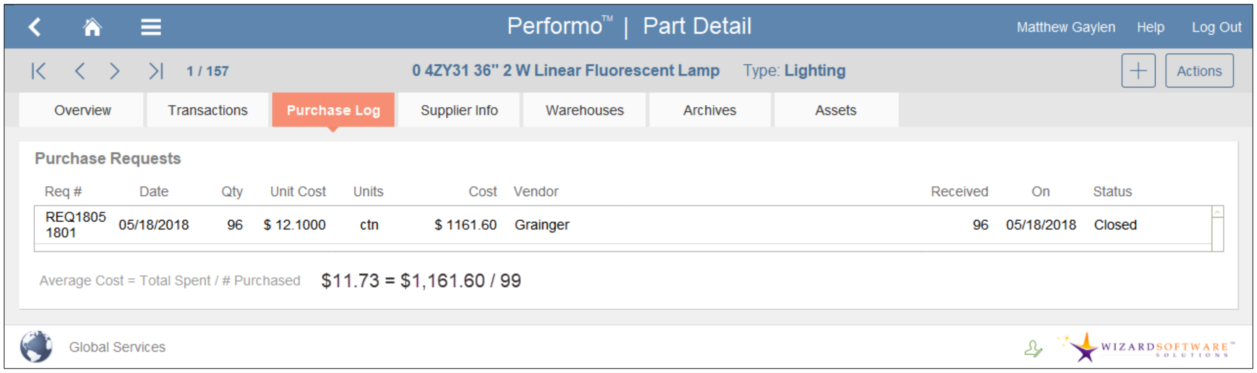


Figure 176 Part Detail - Purchase Log Tab

The purchase log displays a list of all requisitions. Creating requisitions will be covered in a subsequent section of this user reference guide.

Click on any item in the portal to view the Requisition. The requisition form will be discussed later in this user reference guide. Click the **BACK** button on the Title Bar to return to the Purchase Log tab of the Part Detail view.

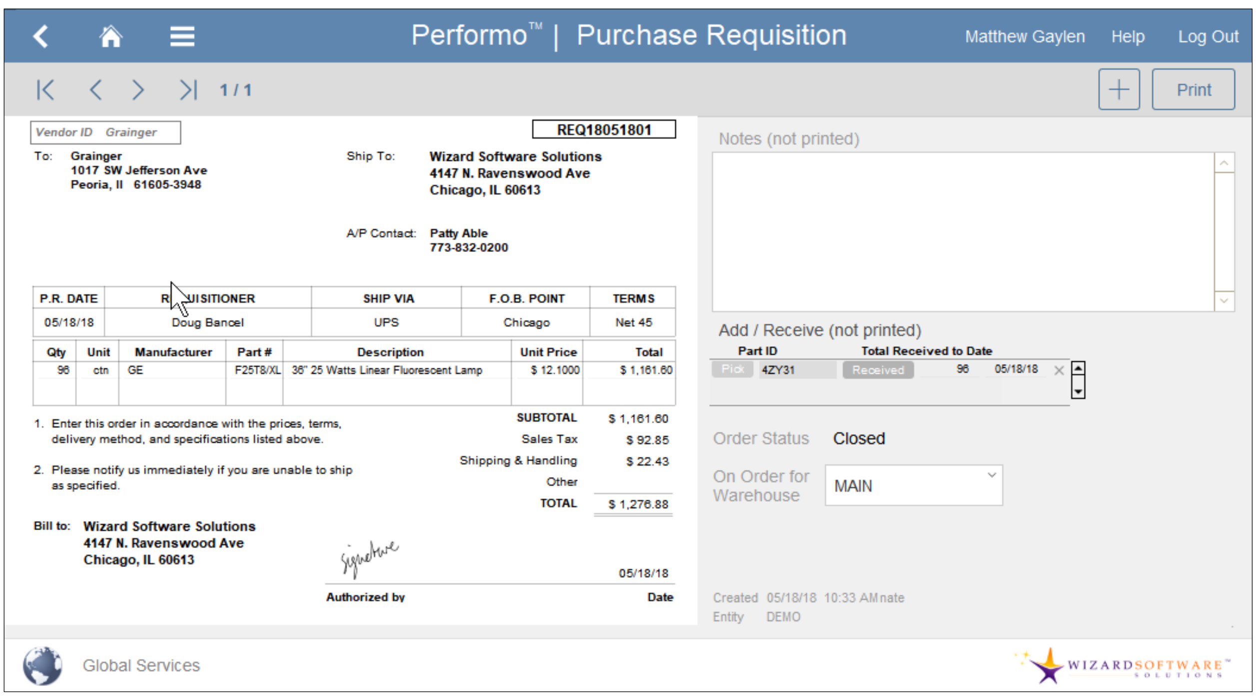


Figure 177 Purchase Requisition screen

▷Video **PART DETAIL – SUPPLIER INFO TAB**

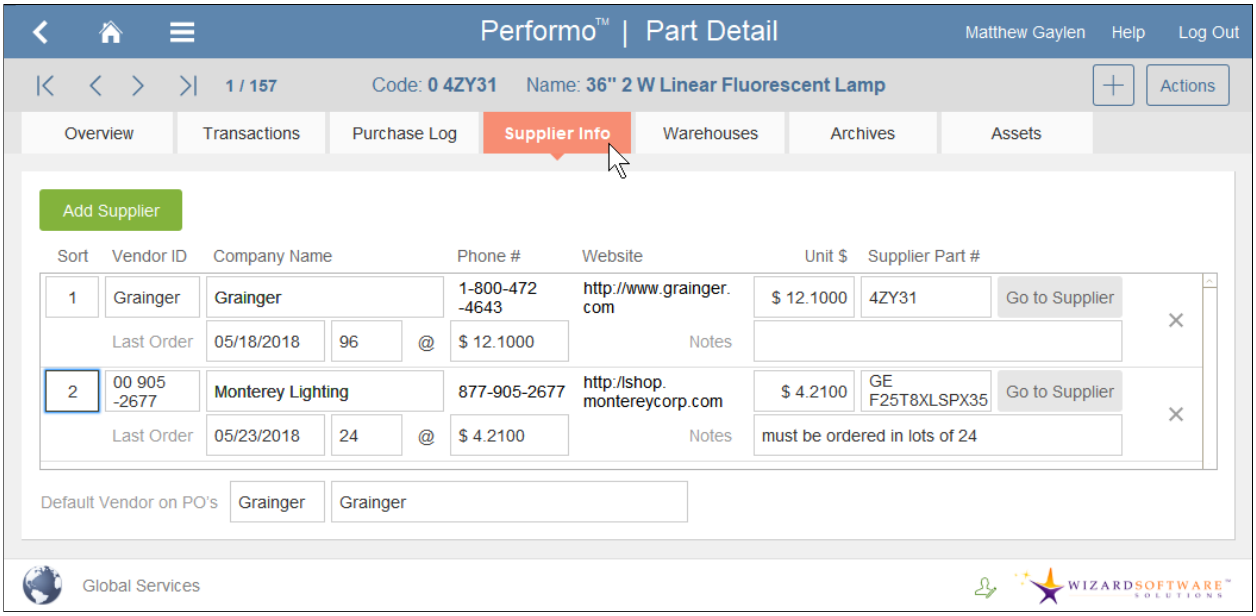


Figure 178 Part Detail - Supplier Info tab

Click the Supplier Info tab. Performo displays the supplier details portal. Each row in the portal displays one vendor for the part. The portal displays significant details about purchasing that part from that supplier. Details include Vendor ID, Company Name, Phone number, Website, Unit cost, and Supplier Part number. Additionally, the portal displays the details about the most recent order of that part from that supplier. Details include date, quantity, and cost per unit.

Click the **GO TO SUPPLIER** button. Performo displays the supplier details in the Vendor module. Click the **BACK** button to return to the Supplier Info tab of the Parts Inventory module.

Click the **ADD SUPPLIER** button. Performo adds a new line to the portal. Both the Vendor ID and the Company Name fields are drop down value lists.

Click the **VENDOR ID** column heading to view the list sorted by vendor ID.

Click the **COMPANY NAME** column heading to view the list by the company name. Choose a value from the list and Performo will automatically enter all data having been previously recorded in the Vendor module. All data entered on the Supplier Info tab is also saved in the Vendor Module. The Vendor module will be discussed later in this user reference guide.

The Default Vendor for PO's below the portal is user definable. Click to choose a default.

▷Video **PART DETAIL – WAREHOUSES TAB**

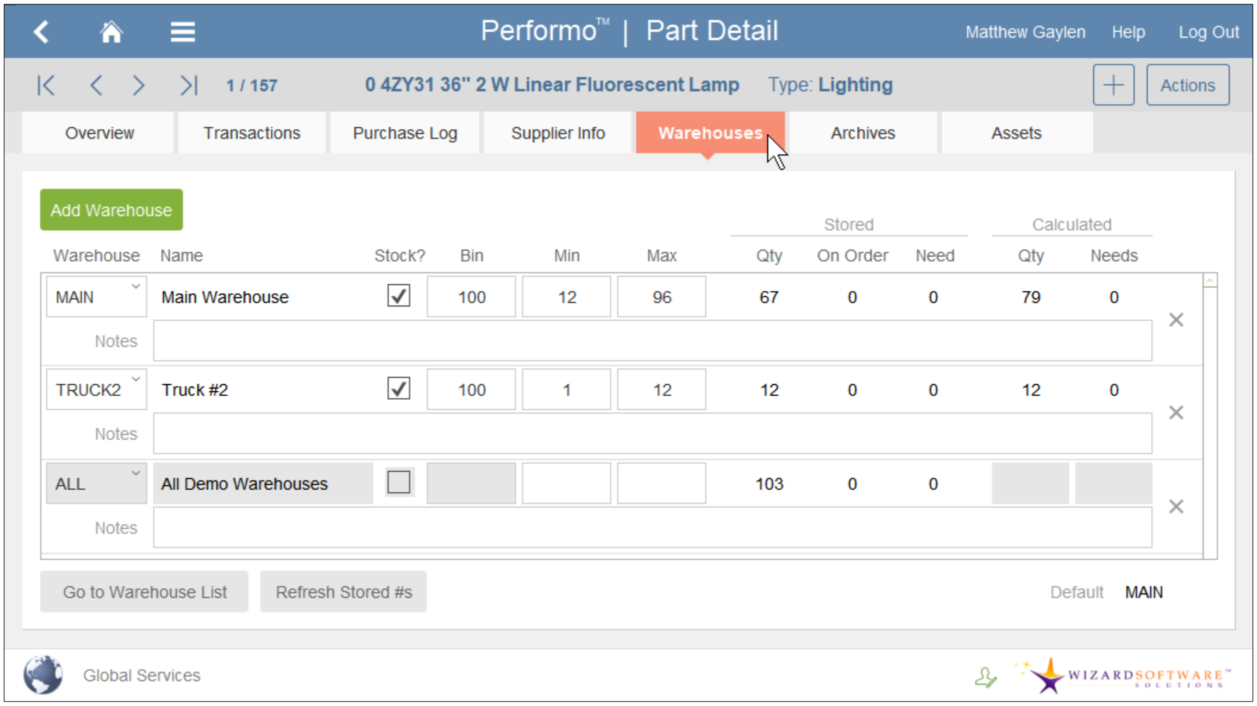


Figure 179 Part Detail - Warehouses Tab

The Warehouses tab displays a portal. Each item in the list is a warehouse. Data displayed about warehouses includes, Warehouse ID, Warehouse Name, the Stock checkbox, the bin number, Minimum, and Maximum quantities. Additionally, under the Stored subheading, the quantity stored, the number or order, and the number needed are displayed. The Calculated subheading displays the current quantity and the needs to be ordered quantity.

All the fields that are not under the Calculated subheading are user-definable in case if adjustments need to be made.

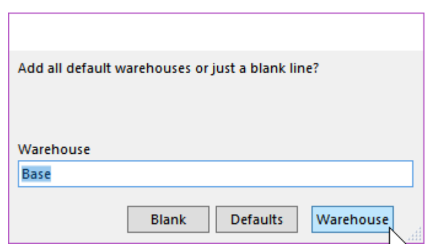


Figure 180 Add Warehouse Dialog Box

Click the green **ADD WAREHOUSE** button. Performo displays the Add Warehouse dialog box. Click the **BLANK** button to add an empty record to the portal. Click the **WAREHOUSE** buton to enter the Warehouse name. The remaining fields can be added manually.

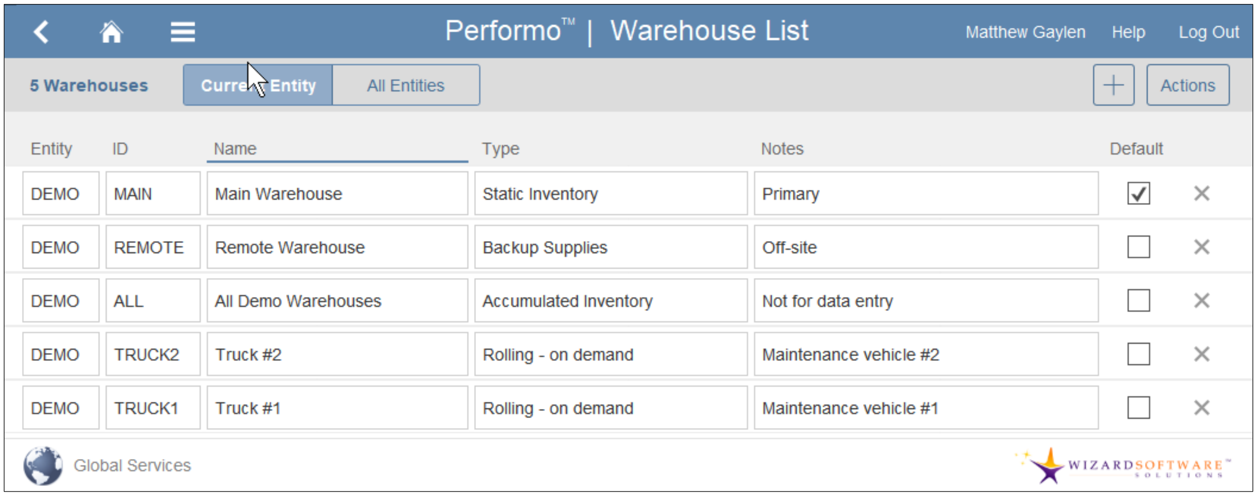


Figure 181 Warehouse List

Click the **GO TO WAREHOUSE LIST** button. Performo navigates to and displays the list of warehouses. The list displays the Entity, The ID, the Name, Type, and Notes for each warehouse. Additionally, there is a checkbox for default and an **X** button for deleting the warehouse.

The **ACTIONS** button includes an option to navigate to the Parts List view.

Click the **CURRENT ENTITY** button. Performo displays the warehouses in the current entity. Click the **ALL ENTITIES** button. Performo displays all the warehouses in the system.

Click the **BACK** button to return to Part Detail.

*Note that the **+** button on the Actions Bar on the Part Detail view adds a new part, irregardless of what tab is selected and on display. However, on the Warehouse List screen, the **+** button on the Actions Bar adds a new warehouse. Click the **+** button on the Actions Bar. Performo adds a new blank line to the warehouse list.*

PART DETAIL – ARCHIVES TAB

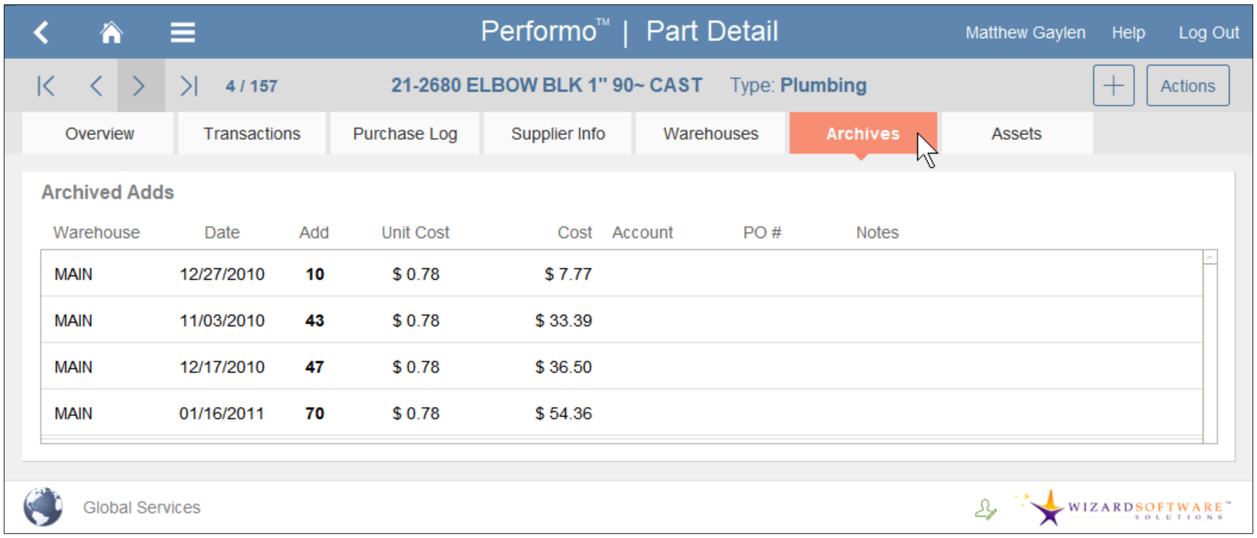


Figure 182 Part Detail - Archives Tab

The Archives tab of the Part Detail view displays a list of transactions which are no longer relevant to the current inventory count.

Each company, corporation or institution has rules about when a transaction should be archived. In many cases, a company will complete a physical count at some point and then archive that year's transactions. This is done in Performo's Transactions module and will be discussed later in this user reference guide.

▷Video

PART DETAIL – ASSETS TAB

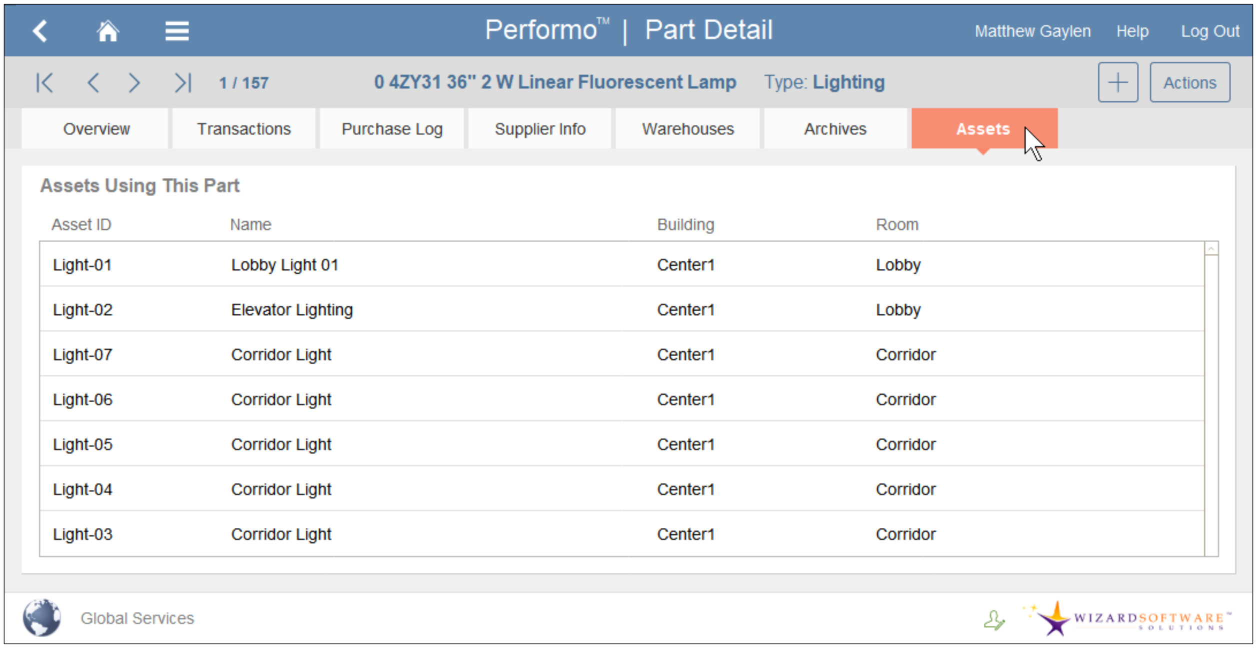


Figure 183 Part Detail - Assets Tab

The Assets tab of the Part Detail view displays all the assets for which the part is used or needed.

Parts are added to assets on the Parts in the Assets module. See asset detail view – specs & parts –parts / tools portal on page #90.

Click any item in the portal. Performo automatically creates a found set of those assets and displays them in the Assets List.

Click the **BACK** button to return to Part Detail.

▷Video

Purchase Requisitions

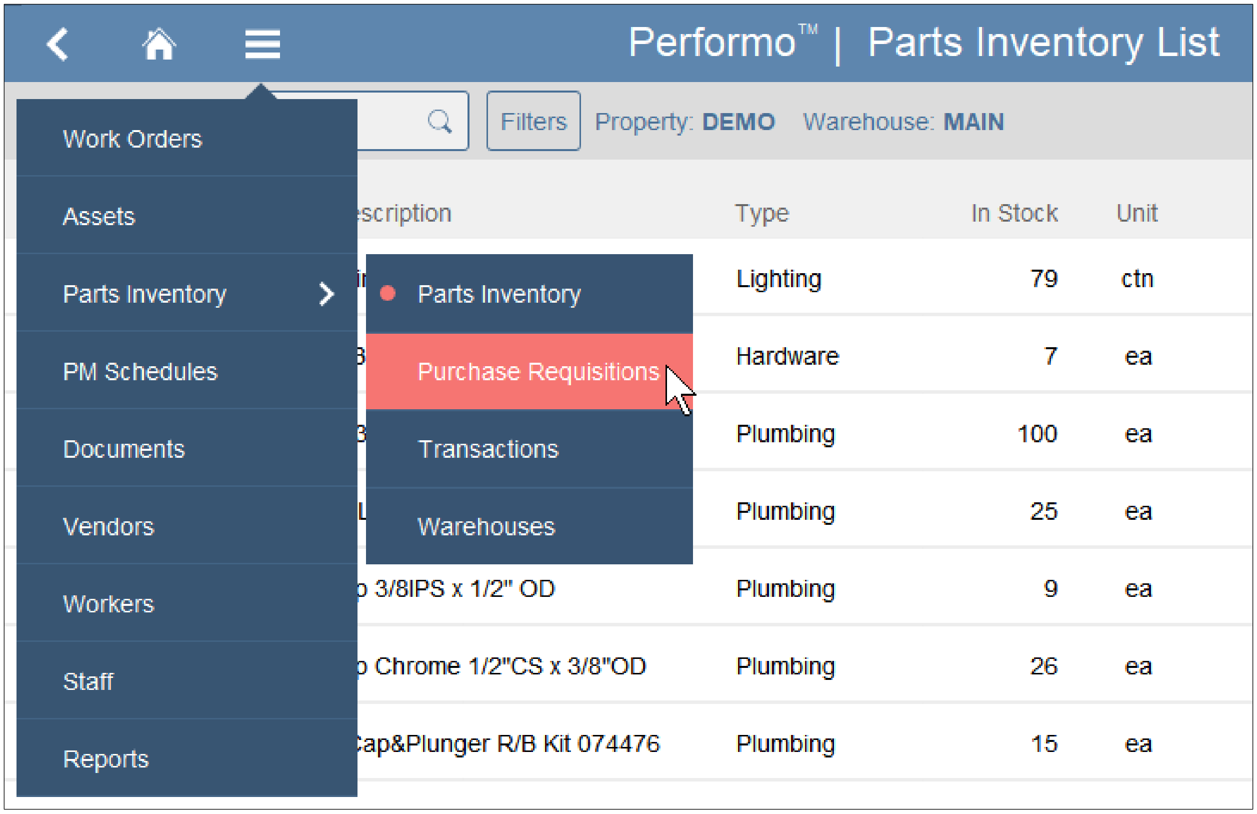


Figure 184 Navigating to Purchase Requisitions

From the Parts Inventory Module, single-click the **NAVIGATION MENU** button. Performo displays the enhanced Module Menu. The enhanced Module Menu list includes the Parts Inventory sub-menu. The Parts Inventory sub-menu displays options for Parts Inventory, Purchase Requisitions, Transactions, and Warehouses.

Click **PURCHASE REQUISITIONS**. Performo displays the Purchase Requisitions List view. Click any purchase requisition to view details.

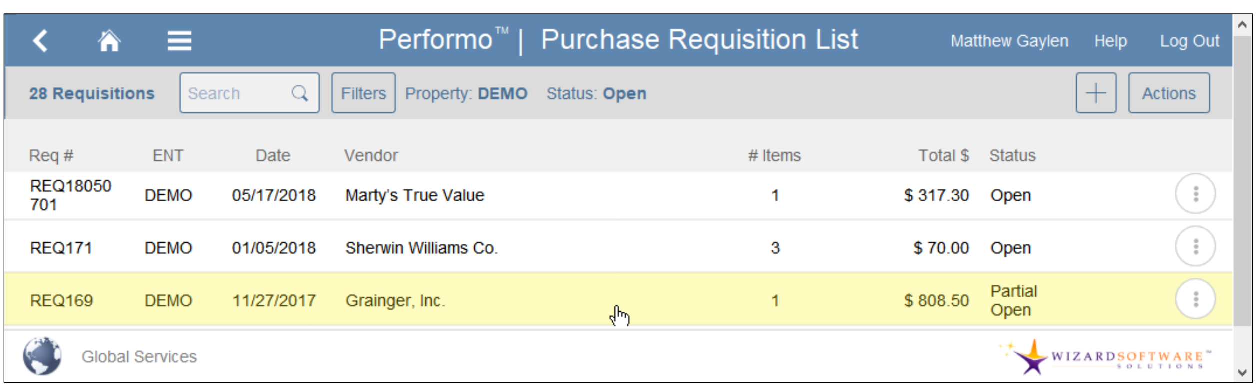


Figure 185 Purchase Requisition List view

PURCHASE REQUISITION LIST VIEW

Figure 186 Purchase Requisition Record Menu

The Purchase Requisitions List displays details including the Requisition number, the Entity, Date, Vendor, number of items ordered, the Total price, the Status and the records menu.

PUCRHASE REQ LIST VIEW RECORD MENU

Click the **RECORD MENU** button. Performo displays options for Delete PO, Print This PO, Constrain by>, and Omit This Record.

Click **CONSTRAIN BY>**. Performo displays options for creating a found set based on any one of the items visible in list view.

Note that Delete PO is a completely different command than Omit This Record. Click **DELETE PO** to permanently remove the PO from the solution. This is useful if an error has been made. Click **OMIT THIS RECORD** to remove the record from the Found Set. The record will not be deleted, but it will not be displayed in the found set until it is added again using the Global Search field or the **FILTERS** button. Records that are not displayed in the found set, will not appear in reports based on the found set.

Click the **GLOBAL SEARCH** field. Performo will match the value in the Global Search field to any value in any field on the Purchase Requisition and display the results in the list view. Optionally, click the **FILTERS** button. Enter the value in the field. Performo will find and display records that match that value in that field. Additionally, the Actions Bar will display the criteria used to create the found set.

PURCHASE REQ LIST VIEW – PRINT THIS PO OPTION

Click **PRINT THIS PO** on the Records Menu.

Facility Wizard Software
435 North Michigan Ave
Suite 3100
Chicago, IL 60611

PURCHASE REQUISITION

REQ104

To: Grainger, Inc.
35 Corporate Circle
Albany, NY 12203

Ship To: Facility Wizard Software
1800 West Larchmont
Suite 3FW
Chicago, IL 60613

A/P Contact: Annie P. Able
773-832-0200
ap@facilitywiz.com

P.R. DATE	REQUISITIONER	SHIP VIA	F.O.B. POINT	TERMS
12/04/10	Doug Bancel	UPS	Chicago	Net 45

Qty	Unit	Manufacturer	Part #	Description	Unit Price	Total
6	ea	GE	F-16 T8 F	F-16 T8 Fluorescent Tubes CW	$ 6.0000	$ 36.00
40	ea	GE	8710/8560	Disposable Mask 3M	$ 0.8515	$ 34.06
6	ea	GE	EHG 120V 750W	Bulb EHG 120V 750Watt Mem	$ 11.0500	$ 66.30
50	ea	GE	F26 DBX/840/4P	Bulb,F26 DBX/840/4P	$ 8.8700	$ 443.50
40	ea	GE	F32T8	F32T8/TL741/6 U shape bulb	$ 5.2000	$ 208.00
15	ea	GE	FBO31/830	FBO31/830 Octron 3000K	$ 6.2400	$ 93.60
30	ea	GE	PL-T32W	PL-T32W/35/4P Bulb	$ 7.0000	$ 210.00
1	ea	GE	90P	90Par side prong 120V Flood	$ 12.0700	$ 12.07
25	ea	GE	1018 XXL	Bunny Suit 1018 XXL Reg	$ 4.5600	$ 114.00
4	ea	GE	94084	Corded Earplugs #94084	$ 0.3009	$ 1.20
7	ea	GE	9292	Cartridge Retainers Part #9292	$ 3.1500	$ 22.05
24	ea	GE	GWLP7	Gloves Work Leather Palm	$ 2.3510	$ 56.42
1	ea	GE	7287	Cartridge Filter Retainer #7287	$ 2.1250	$ 2.13
6	ea	GE	SD50B	Speedi Dry 50lb. Bags	$ 4.9800	$ 29.88
1	ea	GE	KA-TREX-XL-	KA-TREX-XL-PIR/RQE motion	$ 80.8500	$ 80.85

1. Enter this order in accordance with the prices, terms, delivery method, and specifications listed above.

2. Please notify us immediately if you are unable to ship as specified.

SUBTOTAL	$ 1,410.06
Sales Tax	
Shipping & Handling	
Other	
TOTAL	$ 1,410.06

Bill to: Facility Wizard Software
435 North Michigan Ave
Suite 3100
Chicago, IL 60611

DWBancel
Authorized by

12/04/10
Date

Figure 187 Purchase Requisition (Purchase Order)

1) Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

2) Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

3) If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

4) The Purchase Req List Report displays columns for Req #, Date, Vendor, Total $, and Status. Contact the Solution Admin of additional columns are needed or if existing columns are not necessary.

5) Click the **EXIT PREVIEW** button if the report does not need to be saved or printed.

PO SETTINGS

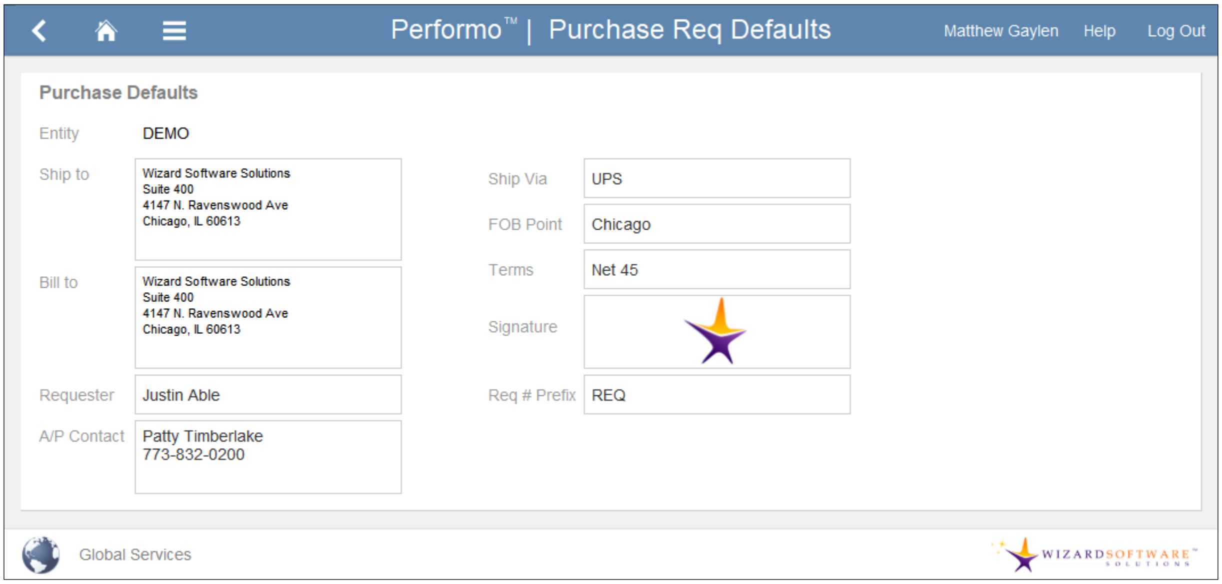


Figure 188 Purchase Req Defaults

Click the **PO SETTINGS** option on the Actions Menu of the Actions Bar on the Purchase Requisition List. Performo displays the Purchase Req Defaults screen.

The values entered under Purchase Defaults include Entity, Ship to, Bill to, Requester, A/P Contact, Ship Via, FOB Point, Signature, and Req # Prefix.

The Ship to field is a text field. The enter key is active in the Ship to text field as it is on all text fields so that an address may be entered as it should appear on the Purchase Requisition screen. Note that the Purchase Requisition screen is the Purchase Order. The Purchase Requisition screen will be discussed in a separate section of this user reference guide.

The Bill to field behaves exactly the same as the Ship to field.

Similarly, add data to the remaining fields. Note that whatever is entered on the Req # Prefix field will be appended to the REQ ID on the Req Prep screen. The Req Prep process will be discussed in a separate section of this user reference guide.

The Signature field is a container. Right-click to choose options for adding a default signature to purchase orders. The default signature will appear on the Purchase Requisition screen.

PURCHASE REQ LIST REPORT

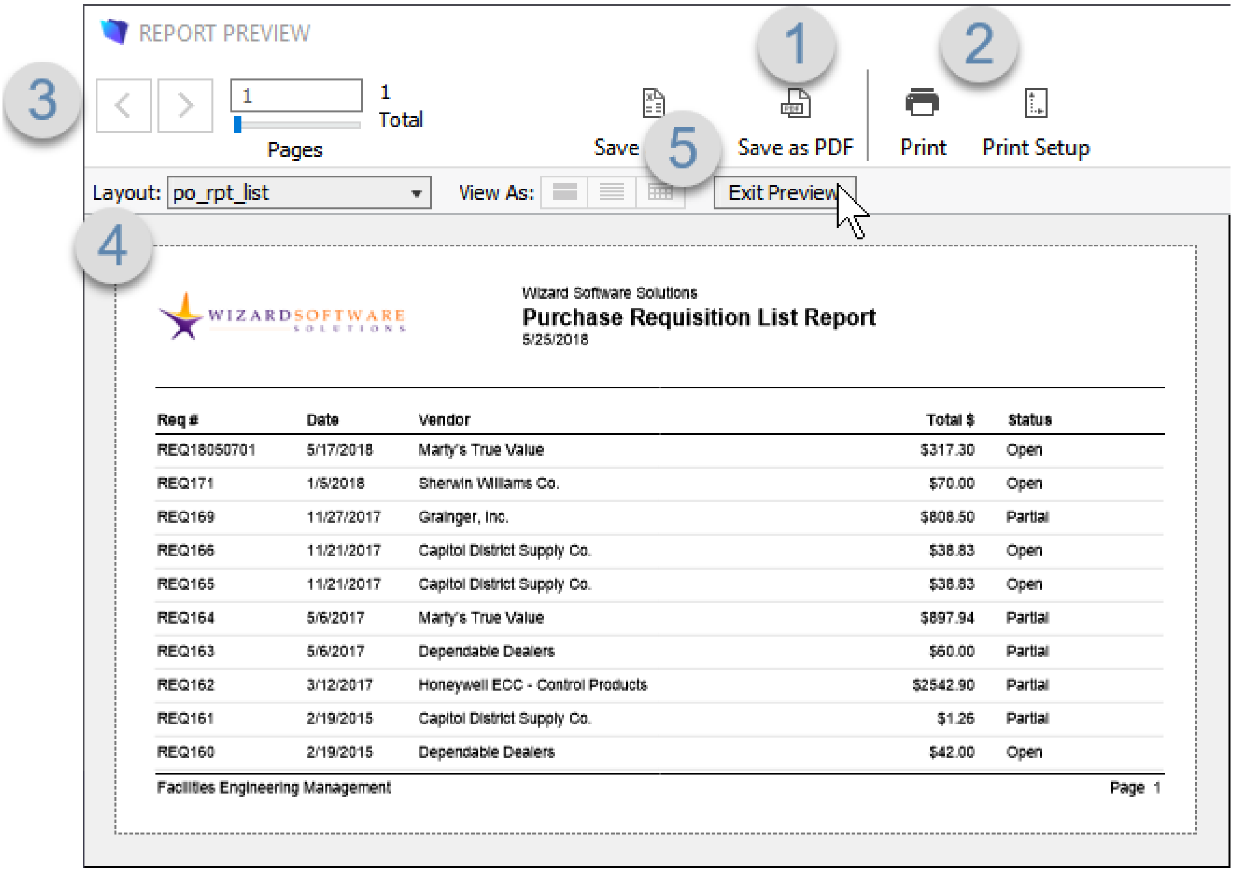


Figure 189 Purchase Req List Report

Choose the option for **PURCHASE REQ LIST REPORT**. Performo displays the Edit Report Title dialog box. Click anywhere on the report title to edit the standard value. When editing is complete, or if the standard report title is acceptable, click the **OK** button to proceed.

Performo displays the Purchase Requisition List Report preview screen.

Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

The Purchase Req List Report displays columns for Req #, Date, Vendor, Total $, and Status. Contact the Solution Admin if additional columns are needed or if existing columns are not necessary.

Click the **EXIT PREVIEW** button if the report does not need to be saved or printed.

▷Video **THE REQUISITION FORM – ORDERING**

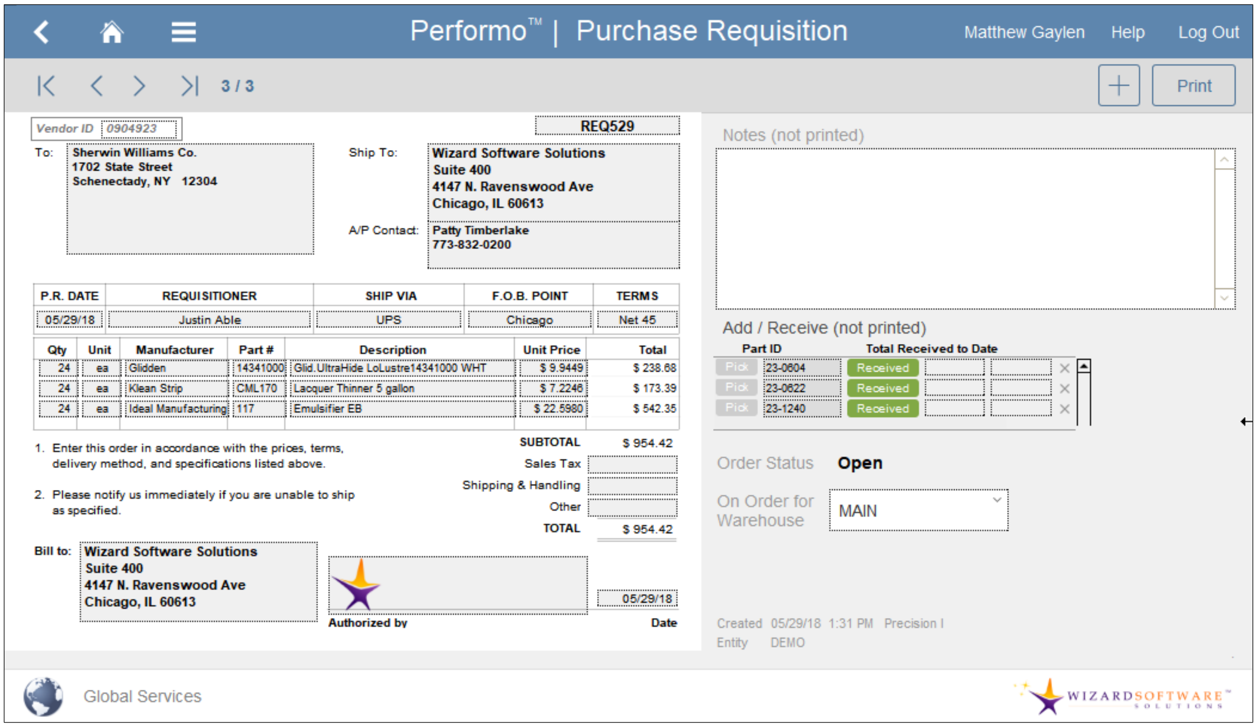


Figure 190 Purchase Requisition Screen

The Purchase Requisition screen is divided into sections. The top of the left side is for vendor and ship to information. The middle of the left side contains the items from the requisition.

Click the **+** button on the Actions Bar to create a new item for the requisition.

Sales Tax, Shipping & Handling, and Other costs may be entered manually. The grand total is calculated automatically.

The Bill To information appears on the bottom of the left side of the screen.

The Authorized By field is a container. Right-click to view options. Options include pasting a signature or navigating to a signature file. The most common formats for signatures are PNG and JPEG.

THE REQUISITION FORM – RECEIVING

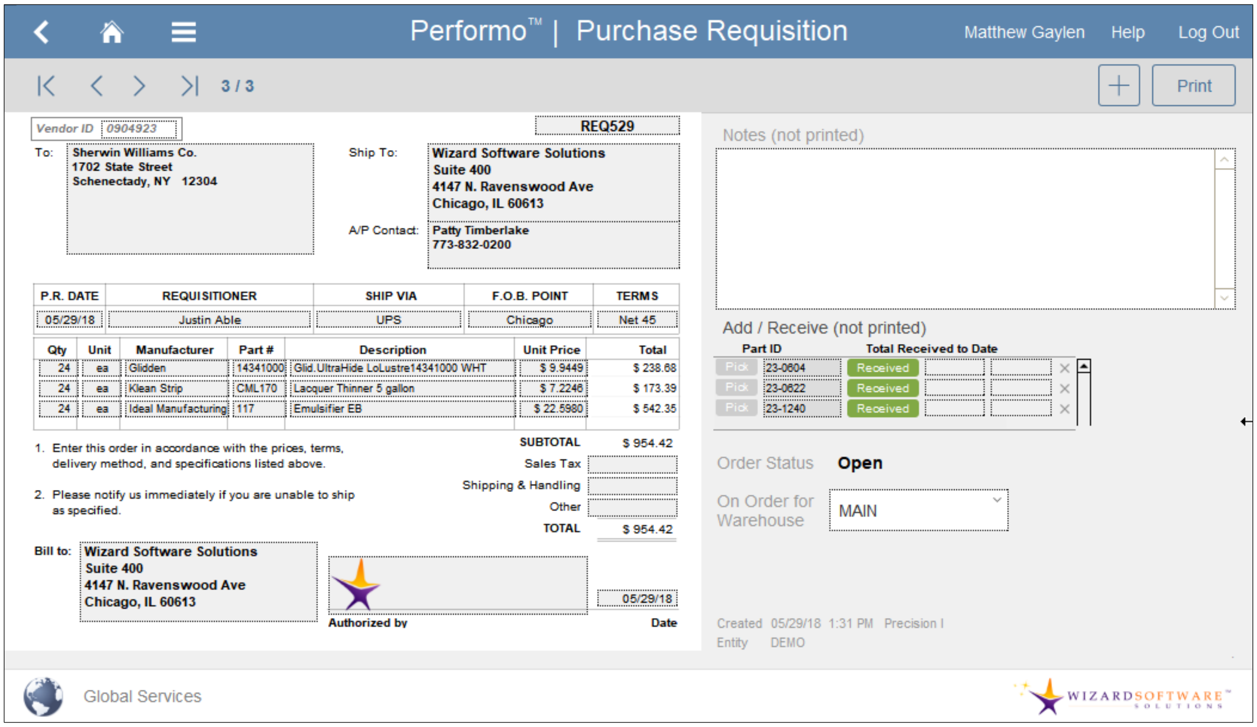


Figure 191 Purchase Requisition Screen

Users will navigate to this form when items are received. If all of the line items were received, click the **RECEIVED** button. Performo opens the Add To Inventory data entry window. Review, enter and edit the data for Warehouse, Quantity, Unit Cost, Account, and Work Order #. Click the **OKAY** button to proceed.

Click the **+** button on the Actions Bar to add a new line to both sides of the purchase requisition. This is useful in situations where items from another purchase order are received or when items need to be added at the last minute prior to ordering.

The right side of the purchase requisition includes the **PICK** button. Click the **PICK** button and Performo will display the Pick Part data entry window. Click any part to include it on the purchase requisition. On the left side of the purchase requisition, manually enter Quantity, Units, Manufacturer, and Part Number.

The delete button is on the right side of the purchase requisition. On the right side of each row, click the **X** button to remove that record.

Click the **PRINT** button on the Actions Bar. Performo displays the Purchase Requisition preview screen. The Purchase Requisition preview screen is discussed on page #136.

Transactions Log

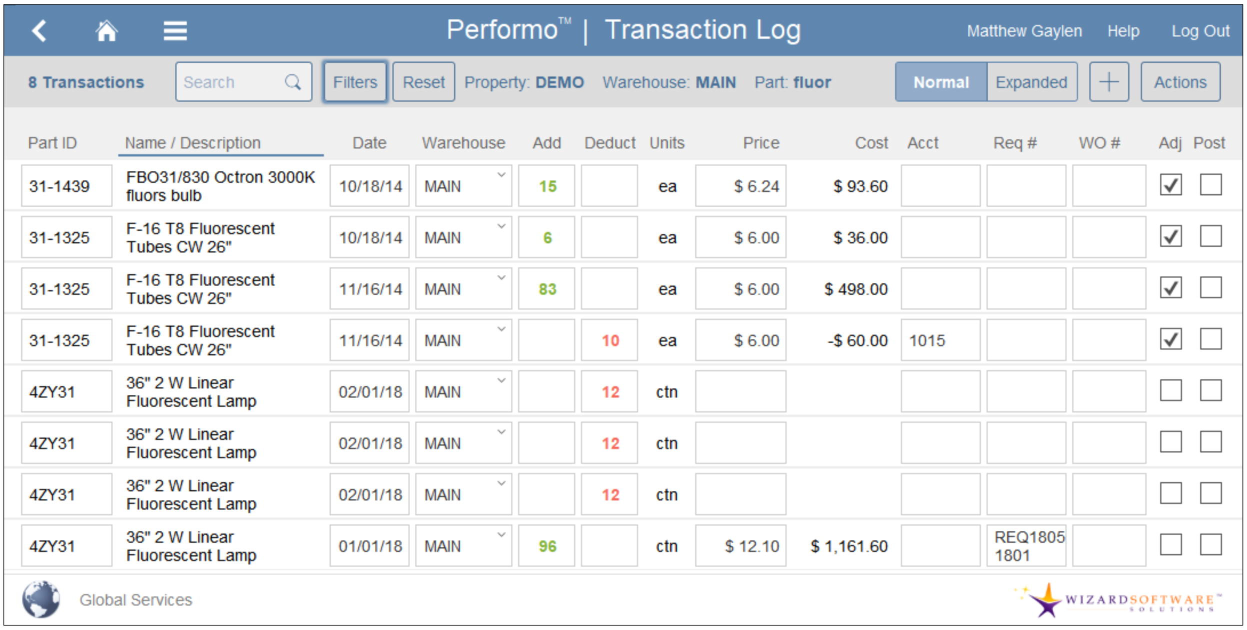


Figure 192 Transactions Log

The Transactions log displays additions, deductions, and adjustments to the parts database.

Data displayed includes, Part Code, Name/Description, Date, Warehouse, Add quantity, Deduct quantity, Units, Price for units, Cost of the transaction, Account number, Requisition number, Work Order number, and checkboxes that indicate whether the transaction was an Adjustment or if it was Posted.

Click the **GLOBAL SEARCH** field to create a found set based on that value. Click the **FILTERS** button to create a found set based on specific values in one or more fields. Click the **RESET** button to return to the standard found set in situations where the found set has been previously modified.

Click the column heading to sort the list view by that value.

ACTIONS ON THE TRANSACTIONS LOG

Choices on the Actions Menu on the Actions Bar on the Transactions Log screen include; Fix Unposted, Archive Transactions, Scan Transactions, Go to Postings Worksheet, Go to Related Work Orders, Go to Archive List, Trans List Report, Trans Account Report, Trans Summary Report.

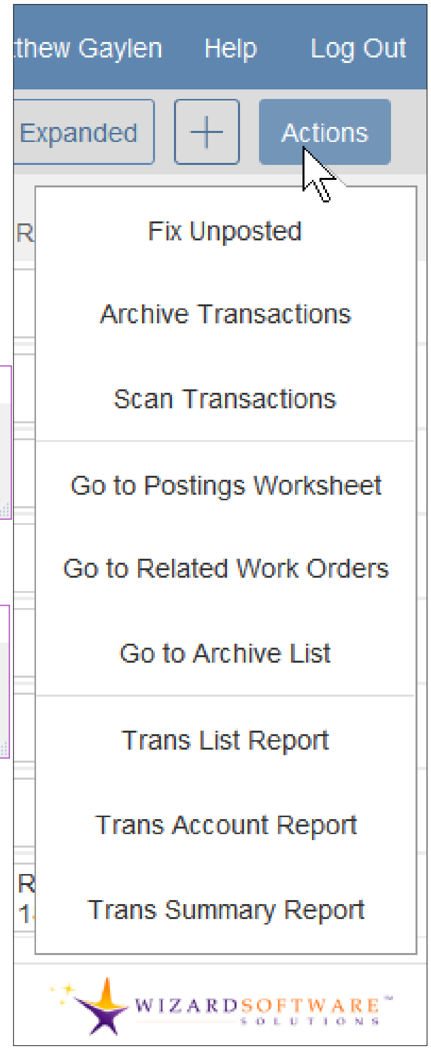


Figure 193 Transactions Log>Actions

FIX UNPOSTED

Click the **FIX UNPOSTED** option on the Actions Menu button on the Actions Bar on the Transactions Log screen. Performo displays the Update Work Order Transactions dialog box.

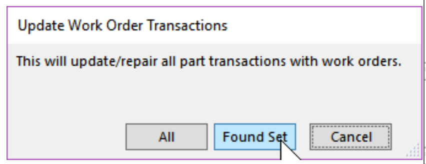


Figure 194 Fix Unposted

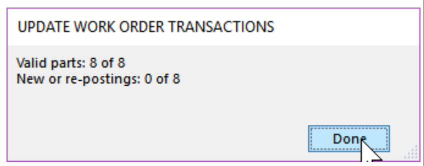


Figure 195 Update Work Order Trans...

"This will update/repair all part transactions with work orders." Click the **ALL** button to repair every transaction.

Click the **FOUND SET** button to reset only the transactions on display.

Click the **CANCEL** button to return to the Transaction Log screen. Upon choosing the **FOUND SET** button or the **ALL** button; Performo displays the Update Work Order Transactions dialog box.

The Update Work Order Transactions dialog box displays the number of valid parts that were posted or reposted. This is useful in situations where parts transactions have been edited or have not been updated or posted. This could occur for any number of reasons.

Click the **DONE** button to proceed and complete the process. Performo automatically navigates to the Transaction Posting Worksheet.

ACTIONS ON THE TRANSACTIONS LOG - GO TO POSTINGS WORKSHEET

Click the **GO TO POSTINGS WORKSHEET** option on the Actions Menu on the Actions Bar on the Transactions Log screen. Performo displays the Transaction Posting Worksheet. This data is used for debugging purposes and will only be useful for superusers and the Wizard Software project engineering team.

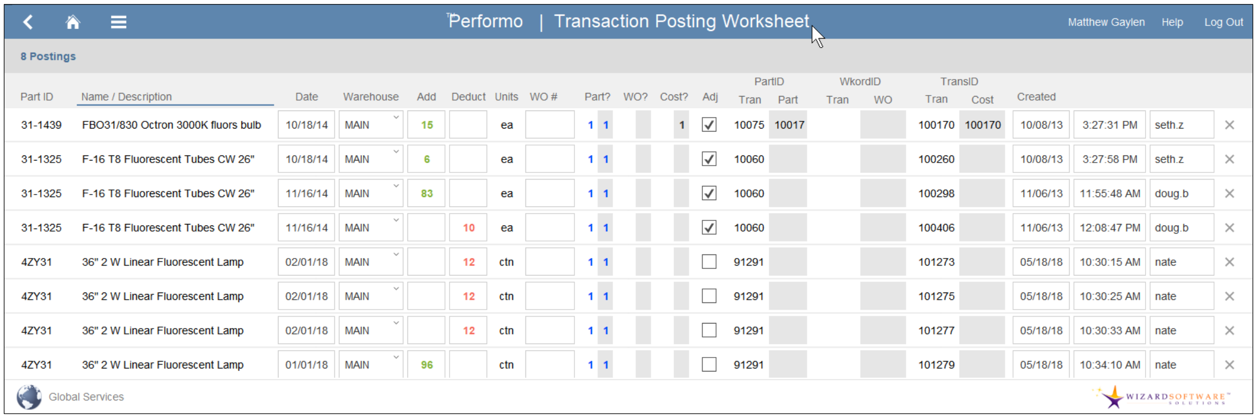
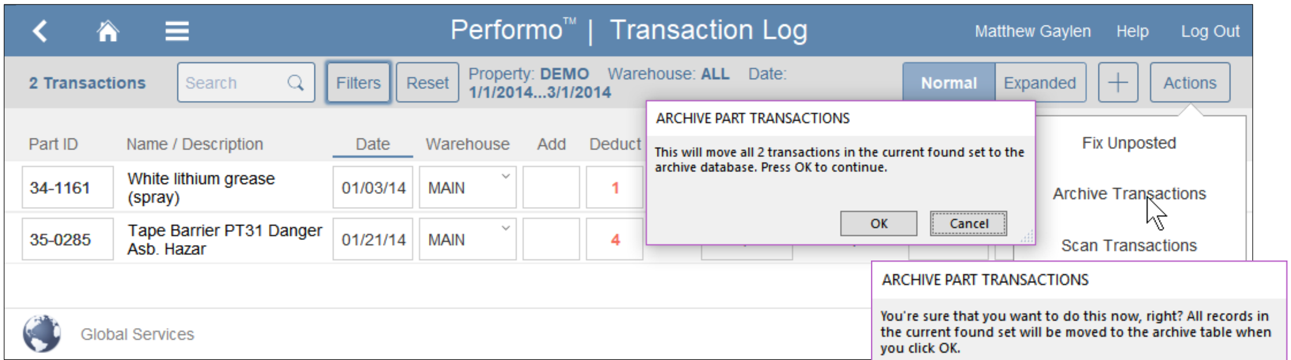


Figure 196 Transaction Posting Worksheet

ACTIONS ON THE TRANSACTIONS LOG - ARCHIVE TRANSACTIONS



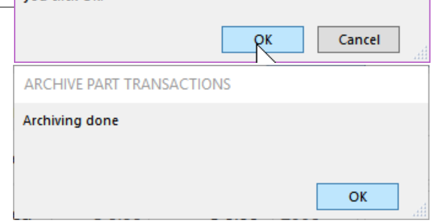


Figure 197 Archive Part Transactions

Click the **ARCHIVE TRANSACTIONS** option on the Actions Menu button on the Actions Bar of the Transactions Log screen. Performo displays the Archive Part Transactions dialog box. “This will move all <*the number of items*> in the current found set to the archive database. Press **OK** to continue.” Performo displays the second Archive Part Transactions dialog box.

“You’re sure that you want to do this now, right? All records in the current found set will be moved to the archive table when you click OK. Click the **OK** button to proceed.”

ACTIONS ON THE TRANSACTIONS LOG – GO TO ARCHIVE LIST

Click the **GO TO ARCHIVE LIST** option on the Actions Menu button on the Actions Bar on the Transactions Log screen. Performo displays the Archive Log. The Archive Log displays the items that were archived. Click the Reset button to view all archived records.

Actions on the Archive Log include the Archive List report.

Click the **BACK** button to return to the Transactions Log.

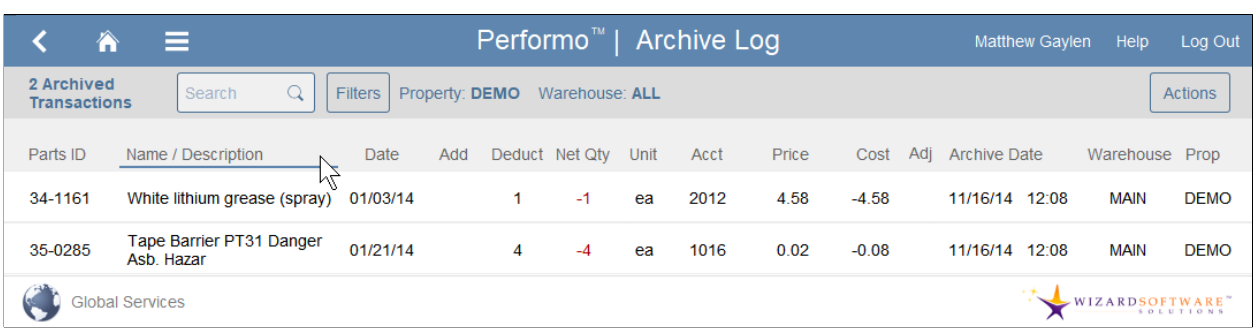


Figure 198 Archive Log

ACTIONS ON THE TRANSACTIONS LOG – GO TO RELATED WORK ORDERS

Click the **GO TO RELATED WORK ORDERS** option on the Actions Menu on the Actions Bar on the Transactions Log screen. Performo displays the Go To All Workorders dialog box. Click the **CANCEL** button to return to the Transaction Log. Click the **OK** button.

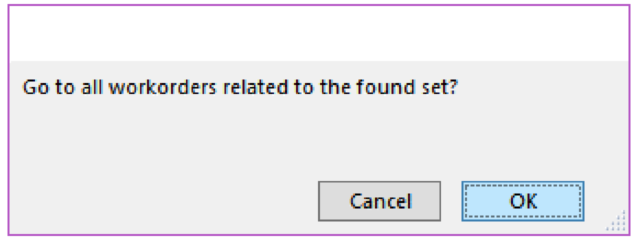


Figure 200 Go To Related Work Orders

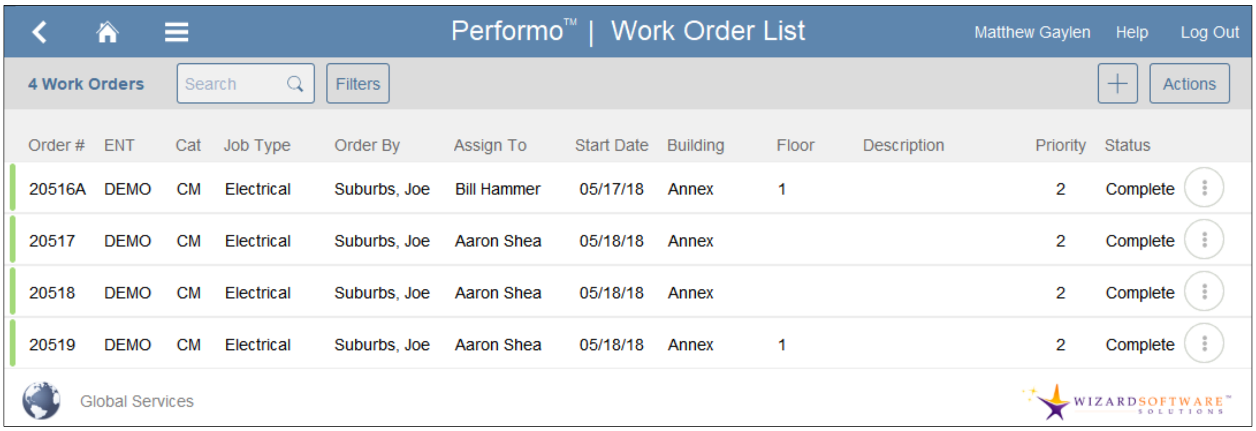


Figure 199 Work Order List based on Found Set of Transactions

Performo navigates to the Work Order module list view and displays the list of work orders where the transactions originated. Users can interact with the work orders as necessary for reference or to enter and edit further data.

Click the **BACK** button to return to the Transactions Log.

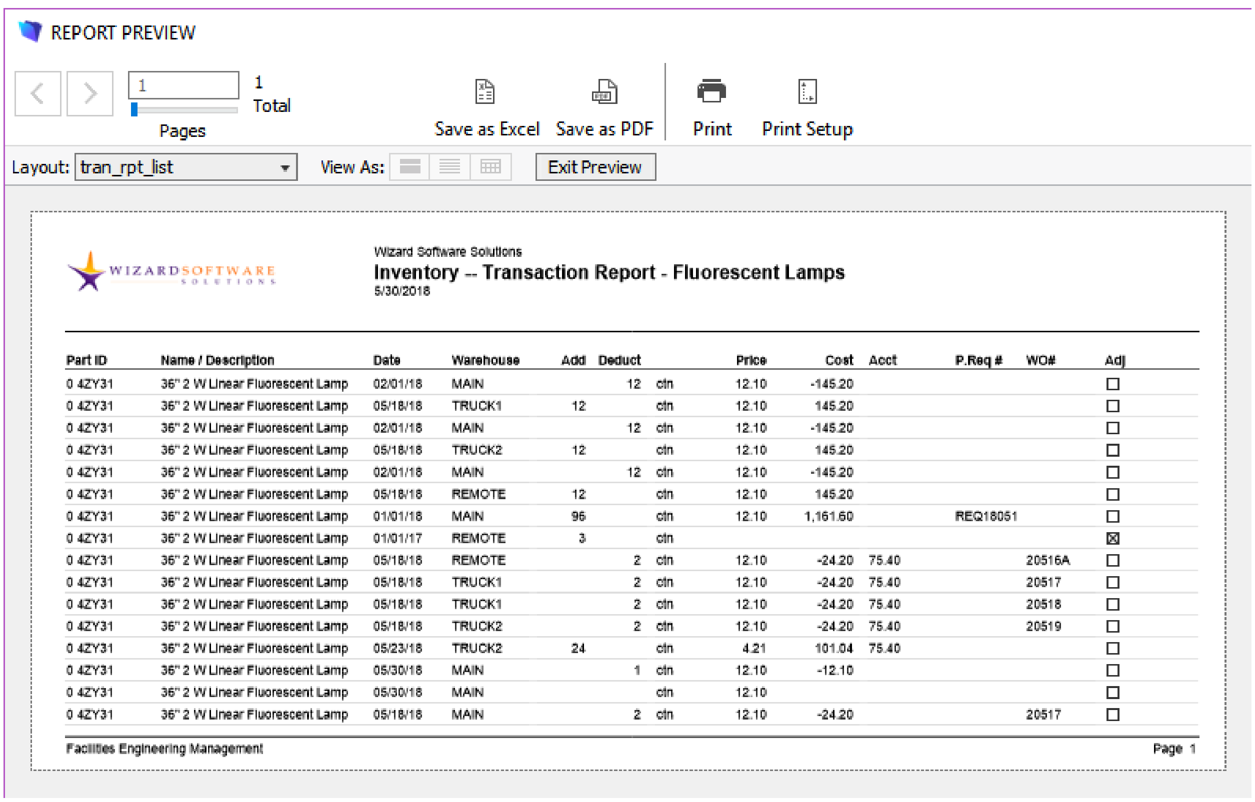
ACTIONS ON THE TRANSACTIONS LOG – TRANSACTION LIST REPORT

Click the **TRANSACTION LIST REPORT** option on the Actions Menu on the Actions Bar on the Transactions Log screen. Performo displays the Edit Report Title dialog box. Click anywhere on the report title to edit the standard value. When editing is complete, or if the standard report title is acceptable, click the **OK** button to proceed.
Performo displays the Inventory – Transaction Report preview screen.

1) Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

2) Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

3) If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.



Wizard Software Solutions
Inventory -- Transaction Report - Fluorescent Lamps
5/30/2018

Part ID	Name / Description	Date	Warehouse	Add	Deduct		Price	Cost	Acct	P.Req #	WO#	Adj
0 4ZY31	36" 2 W Linear Fluorescent Lamp	02/01/18	MAIN		12	ctn	12.10	-145.20				☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/18/18	TRUCK1	12		ctn	12.10	145.20				☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	02/01/18	MAIN		12	ctn	12.10	-145.20				☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/18/18	TRUCK2	12		ctn	12.10	145.20				☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	02/01/18	MAIN		12	ctn	12.10	-145.20				☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/18/18	REMOTE	12		ctn	12.10	145.20				☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	01/01/18	MAIN	96		ctn	12.10	1,161.60		REQ18051		☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	01/01/17	REMOTE	3		ctn						☒
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/18/18	REMOTE		2	ctn	12.10	-24.20	75.40		20516A	☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/18/18	TRUCK1		2	ctn	12.10	-24.20	75.40		20517	☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/18/18	TRUCK1		2	ctn	12.10	-24.20	75.40		20518	☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/18/18	TRUCK2		2	ctn	12.10	-24.20	75.40		20519	☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/23/18	TRUCK2	24		ctn	4.21	101.04	75.40			☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/30/18	MAIN		1	ctn	12.10	-12.10				☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/30/18	MAIN			ctn	12.10					☐
0 4ZY31	36" 2 W Linear Fluorescent Lamp	05/18/18	MAIN		2	ctn	12.10	-24.20			20517	☐

Facilities Engineering Management
Page 1

Figure 201 Inventory - Transaction Report

ACTIONS ON THE TRANSACTIONS LOG – TRANSACTION BY ACCOUNT REPORT

Click the **TRANSACTION BY ACCOUNT** option on the Actions Menu on the Actions Bar on the Transactions Log screen.

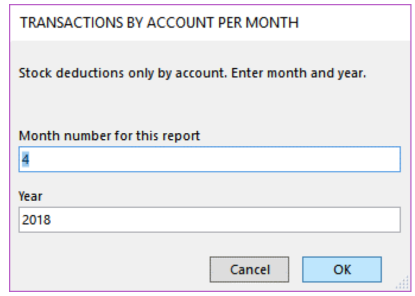


Figure 202 Transactions By Account

Performo displays the Transactions By Account Per Month dialog box. Enter the Month number and the year for this report. Click the **OK** button to proceed. Performo displays the Transactions by Account report preview screen.

1) Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

2) Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

3) If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

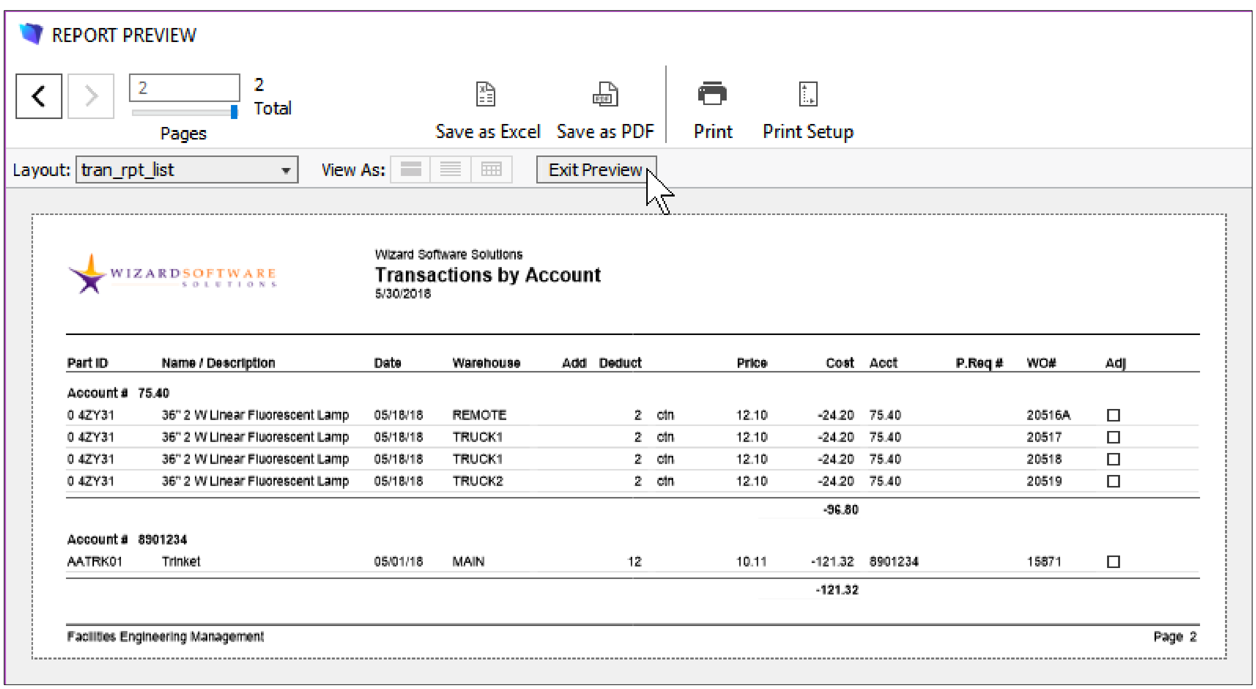


Figure 203 Inventory - Transaction Report

ACTIONS ON THE TRANSACTIONS LOG – TRANSACTION SUMMARY REPORT

Click the **TRANSACTION SUMMARY REPORT** option on the Actions Menu on the Actions Bar on the Transactions Log screen. Performo displays the Edit Report Title dialog box. Enter, edit or accept the report title and Click the **OK** button to proceed.

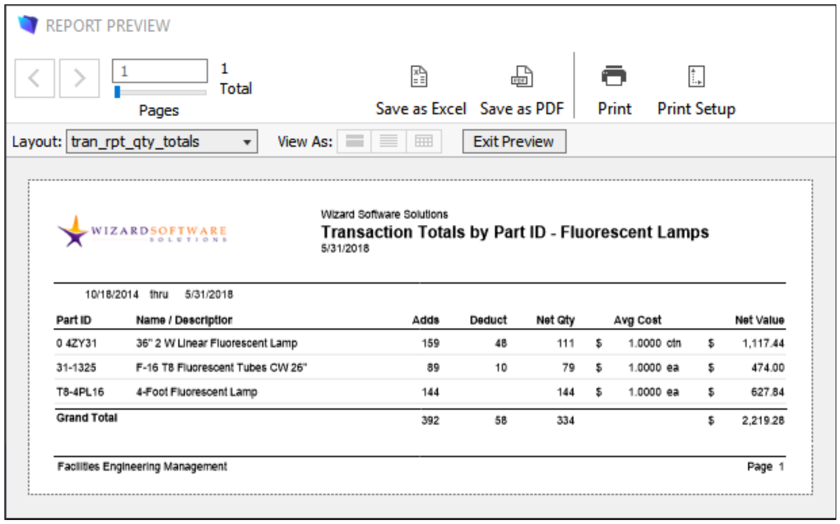


Figure 204 Inventory - Transaction Report

Performo displays the Transaction Totals by Part Code report preview screen. The trailing grand summary appears at the end of the last page of the report.

1) Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

2) Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

3) If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

4) Click the **EXIT PREVIEW** button to return to the Transaction Log.

TRANSACTION EXPANDED LOG

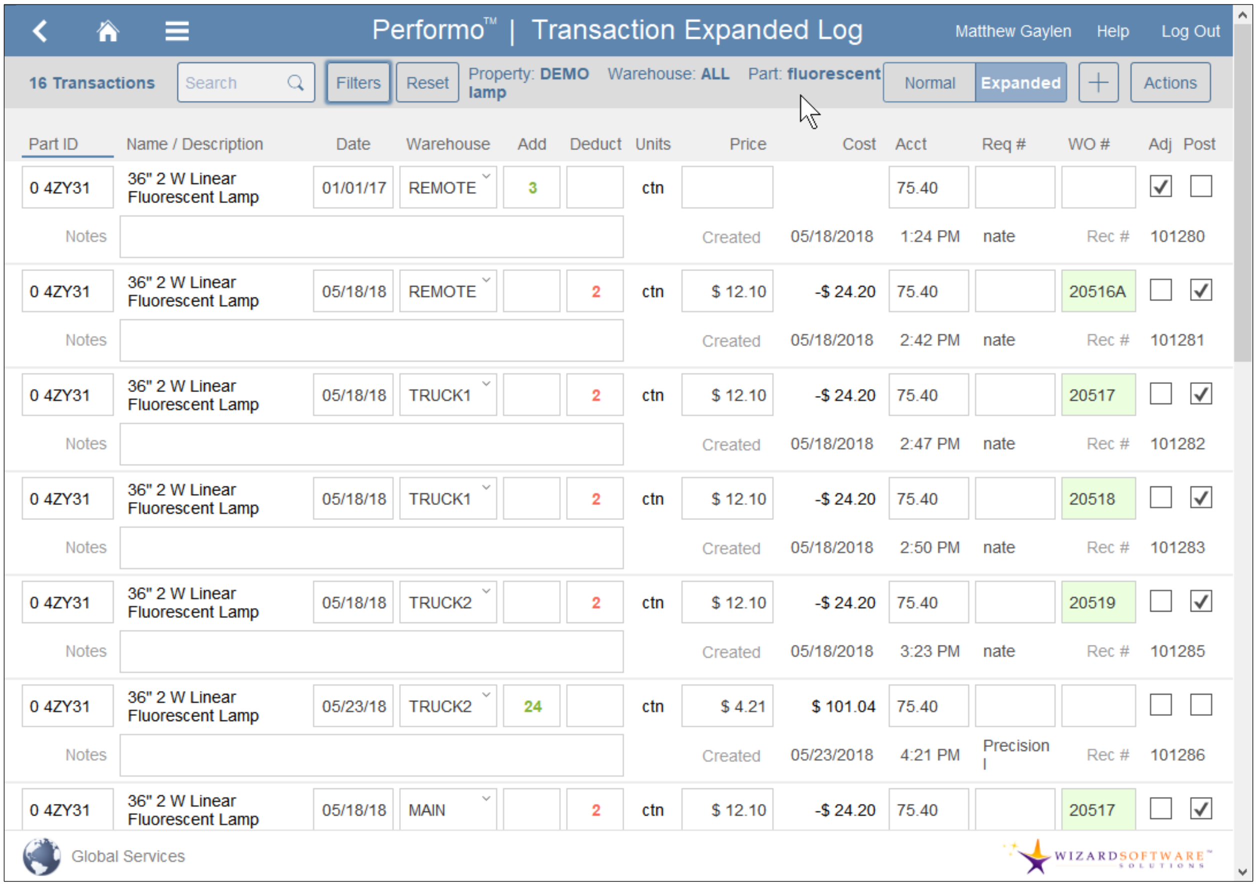


Figure 205 Transaction Expanded Log

Click the **EXPANDED** button. Performo displays a 2-line list view. The 2-line list view displays extra details about each transaction. Extra details include Notes, Created information such as Date, time and user name, as well as the Requisition number of the part transaction.

Click the **NORMAL** button to return to 1-line view.

Documents Module

The Documents List view displays an overview of attachments. Each row is one file. Each column is one bit of information about that file. Columns displayed on list view include, Doc #, Entity, Type, Category, Document Title, Version, Date, and Status. There are also three buttons and one thumbnail image of the document at the end of each row. The buttons are **UPLOAD**, **DOWNLOAD**, and **VIEW**. Actions on the Document List view include Document List Report. Click the **DOCUMENT LIST** option. Performo displays the Document List report.

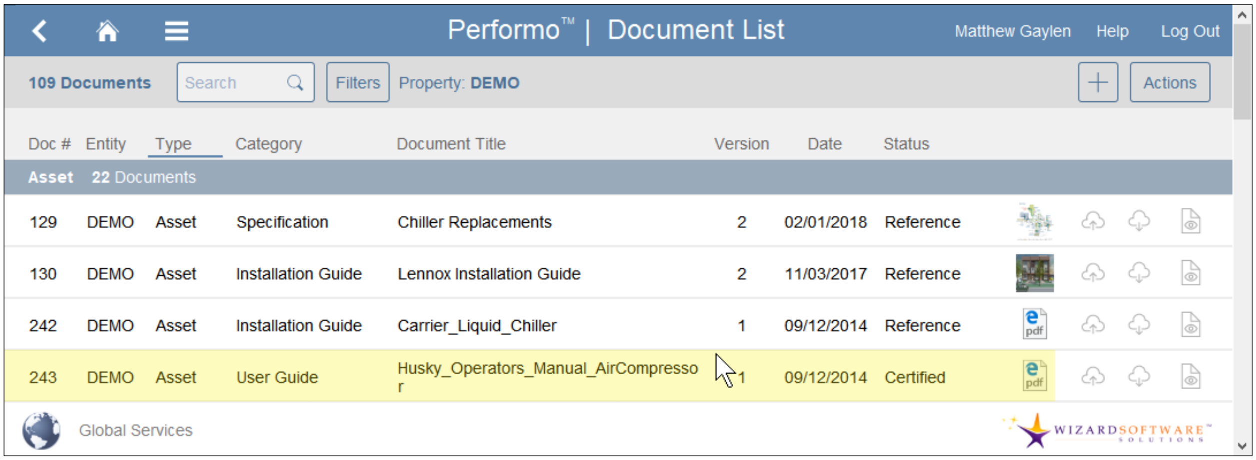


Figure 206 Documents List view

Click the **UPLOAD** button. Performo displays the upload document dialog box. Click the **YES** button. Performo displays the standard Select File To Upload dialog box. Navigate to any accessible file. Click the **OPEN** button. Performo uploads the document, saving the previous document as a version.

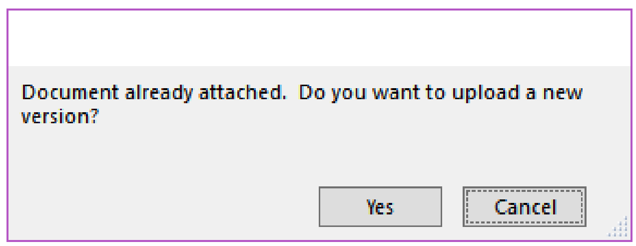


Figure 207Document Already Attached dialog box

Click the **DOWNLOAD** button. Performo opens the Select File Export Location dialog box. Navigate to any accessible directory, name the file and click the **OK** button to complete process.

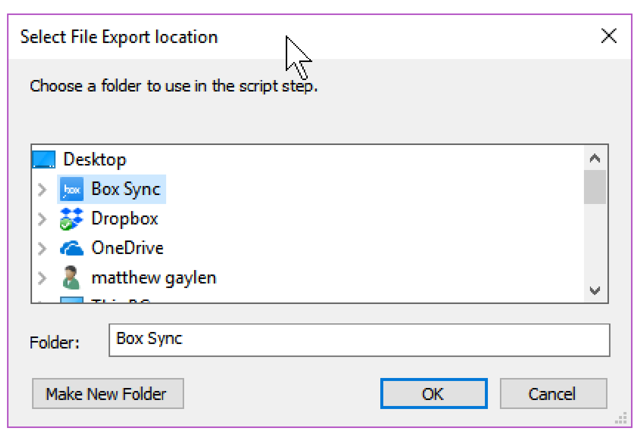


Figure 208 Select File Export Location Dialog Box

DOCUMENTS LIST VIEW – VIEW DOCUMENT BUTTON

Click the **VIEW DOCUMENT** button at the far, right side of the row. Performo displays the document using the default application for that file type.

Click anywhere else on the row and Performo will navigate to the detail view for that document.

Figure 209 PDF file opened via Microsoft Edge

DOCUMENTS MODULE – ACTIONS BAR

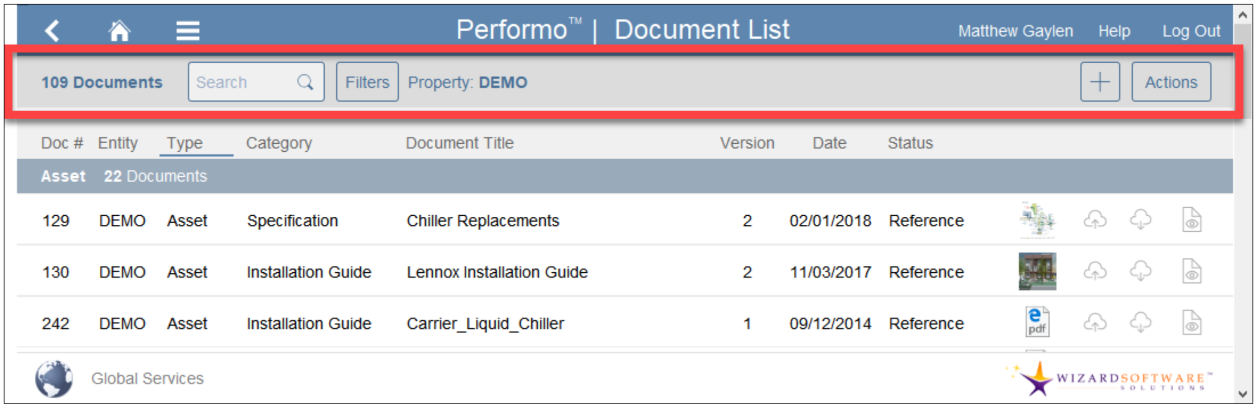


Figure 210 Documents Module - Actions Bar

The far-left side of the Actions Bar on the Document List view displays the number of items in the found set.

Enter data into the Global Search field. Performo will display any record that matches that value in any field.

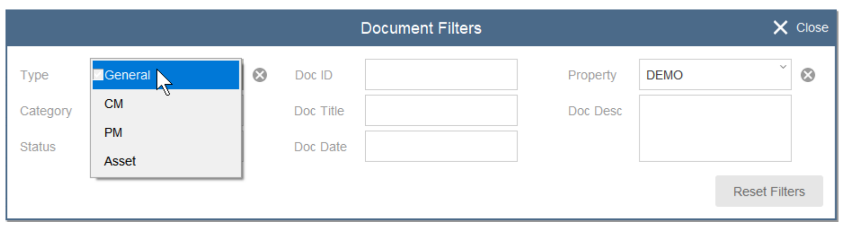


Figure 211 Document Filters

Click the **FILTERS** button. Performo displays the Filters data entry window. Enter data into as many filters as necessary to find the record or records to investigate, analyze and, or manage. Click the **DELETE VALUE** button depicted by a white x in a grey circle to remove the value from that field. When a field is blank in the filters data entry window, Performo will not consider data in that field when finding matching records.

Click the **RESET** button in the Document Filters dialog box to start over. Click the **X** button or the **CLOSE** button, to return to the Document List view. Performo displays records matching values entered in chosen fields. Click the **RESET** button on the Actions Bar to display the standard found set.

Click the **+** button to attach a new document. Performo opens the Select File Export Location dialog box. Navigate to any accessible directory, name the file and click the **OK** button to complete process. Performo automatically adds the Document #, The *General* Type, the Document Title, the Version number 1, and the current date.

DOCUMENT LIST – DETAIL VIEW

Hover over any document record. Performo displays the record with a yellow highlight. Click anywhere on the yellow highlight. Performo displays the detail view for that document.

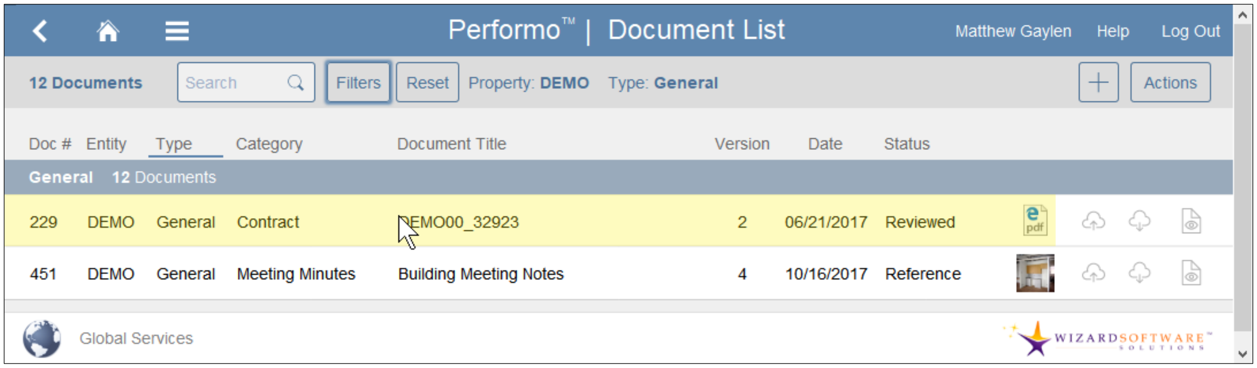


Figure 213 Document List View - Selecting Document

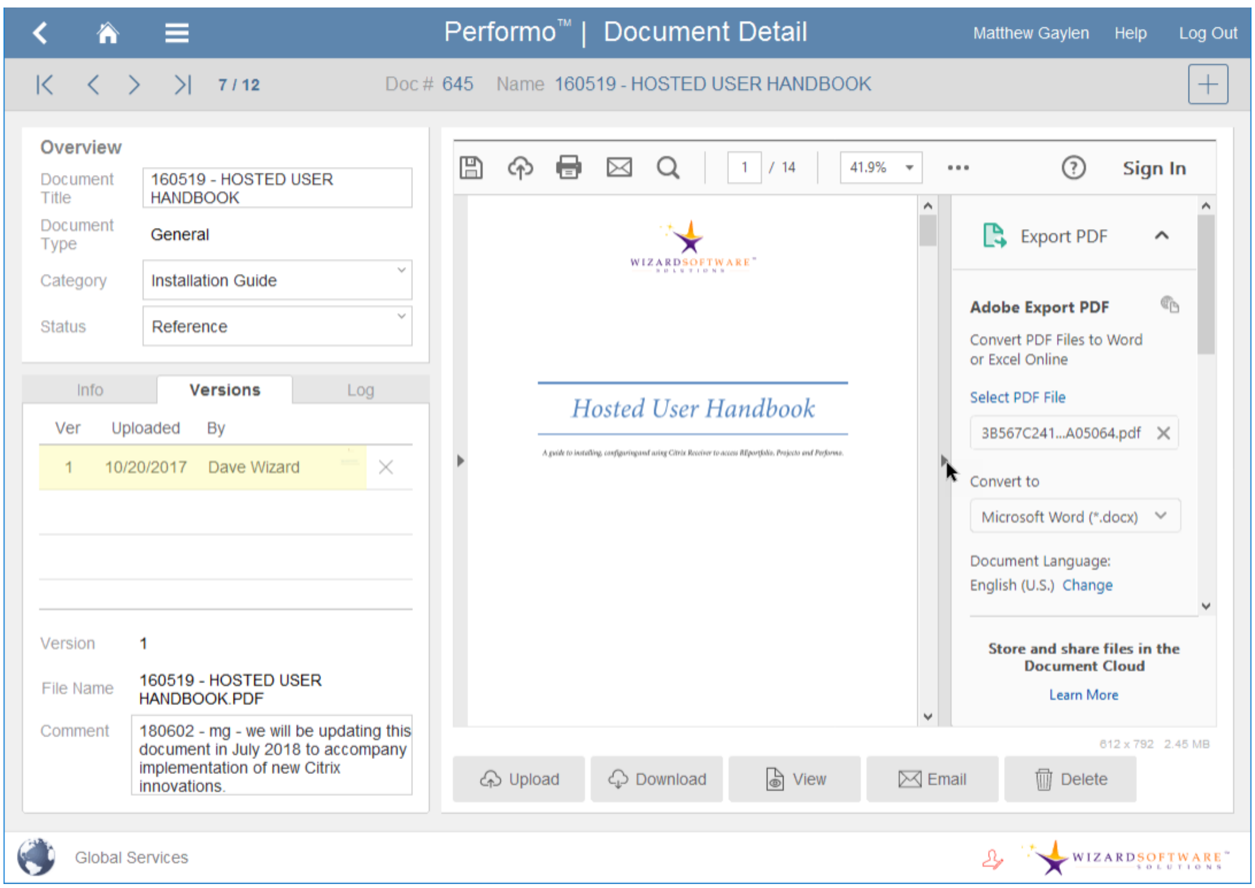


Figure 212 Document Detail View - PDF documents

The left side of Document Detail view displays the section for Overview as well as tabs for Info, Versions, and Log.

DOCUMENTS DETAIL – OVERVIEW SECTION

The Overview section of the Document Detail view displays fields for Document Title, Document Type, Category, and Status.

Document Title is user-definable. Any data may be entered and edited once entered by any user with write admin privileges.

Document Type is determined by the module in use when the document was attached. General documents are uploaded from the Documents module. Asset documents are uploaded from the Assets module. PM documents are uploaded from the PM Schedules module. CM documents are uploaded from the Work Orders module.

Off-the-shelf, the Document Category value list contains a list of common options. Contact the Solution Admin if changes to this list are required.

The Document Status value list contains options for Archival, Certified, Draft, Obsolete, Reference, and Reviewed. Again, contact the Solution Admin if changes to this list are required.

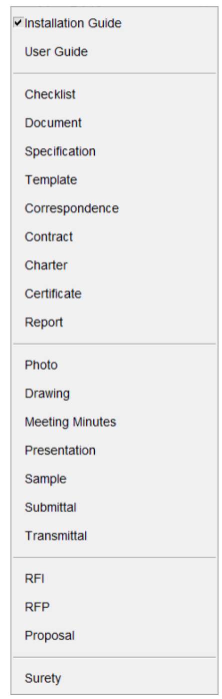


Figure 214 Category

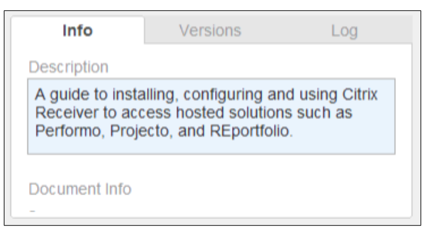


Figure 215 Document Detail - Info Tab

DOCUMENT DETAIL – INFO TAB

The Info tab on the Document Detail view displays the Description text field. Click to begin entering data. Any text may be entered. Any amount of text may be entered.

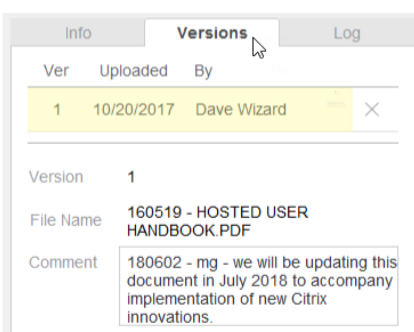


Figure 216 Document Detail - Versions Tab

DOCUMENT DETAIL – VERSIONS TAB

The Versions tab displays a list of document editions. Click any version on the left to view that edition in the document container field on the right. The Versions Tab also displays the original File Name. Note that the File Name could be different than the Document Title because the Document Title is a user-definable text field. The Comments field is also user-definable. Any text may be entered. Click the **X** button on the right side the version tab. Upon confirmation, Performo will delete that edition permanently.

DOCUMENT DETAIL – LOG TAB

The Log tab of the Document Detail view displays a list of edits and changes to the various document versions. Data captured and displayed includes, Version number, Date, Type of change, the change that was made and the user name of the person making the change.

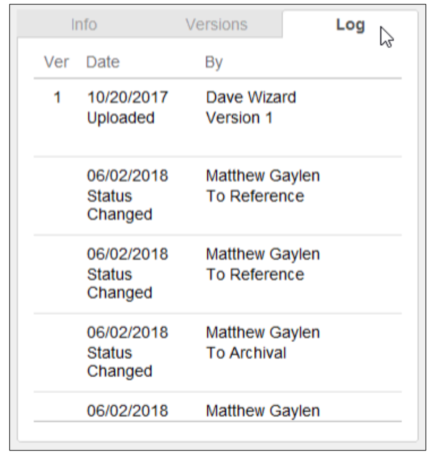


Figure 217 Document Detail - Log Tab

DOCUMENT DETAIL – CONTAINER FIELD

Performo displays the document in a container field. In the case of the PDF file type, the container field is fully interactive. Users can click **SAVE, UPLOAD, PRINT, EMAIL, SEARCH, NAVIGATE,** and **ZOOM** buttons right from within the document container field. Additional options appear on the right side when there is a PDF in the container field. These options are subject to change based on the PDF OEM.

For PDF and non-PDF files, users can click the **UPLOAD, DOWNLOAD, VIEW, EMAIL**, and **DELETE** buttons immediately below the document container field.

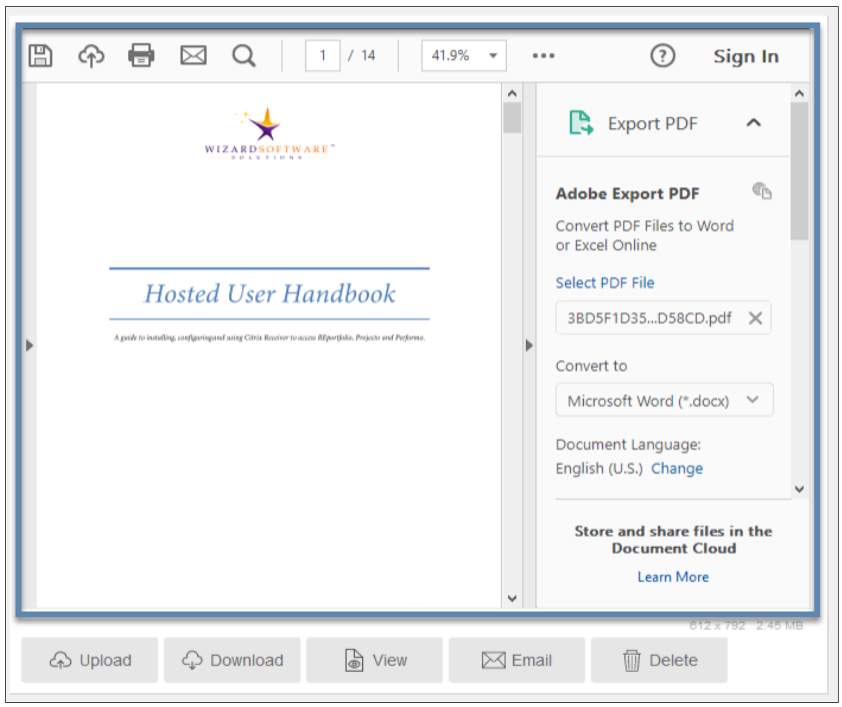


Figure 218 Document Detail - Document Container Field

Note that the **VIEW** button, opens the document outside of Performo in the application chosen by the operating system as the default for that document type. Changes made to the document within that application can be uploaded as a subsequent version.

Click the **UPLOAD** button. Performo displays the Document Already Attached dialog box. Click the **YES** button. Performo automatically adds a new version of the document. The Log tab and the Versions tab are automatically updated.

Vendors Module

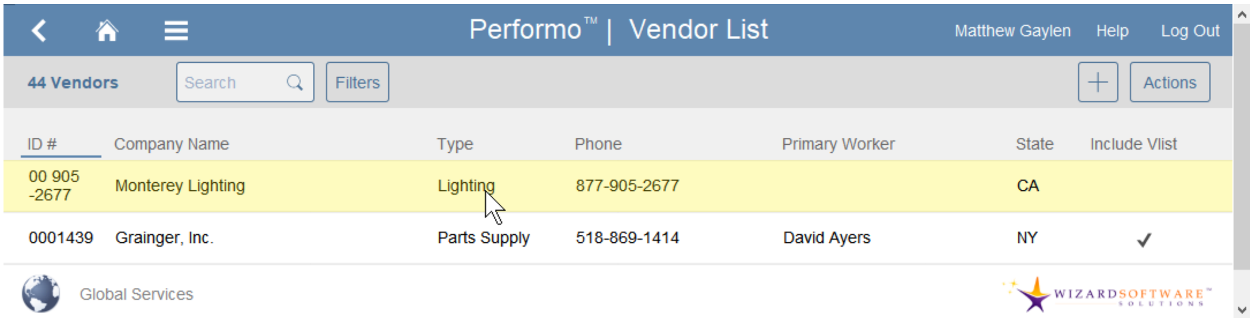


Figure 219 Vendor List View

The Vendors List view displays one row for each vendor. Each column is a piece of information about the vendor. Columns in list view include, ID#, Company Name, Type, Phone, Primary Worker, State, and the Include Visit checkbox. Actions on the Vendor List include Vendor List Report.

The far-left side of the Actions Bar on the Vendor List view displays the number of items in the found set.

Enter data into the Global Search field. Performo will display any record that matches that value in any field.

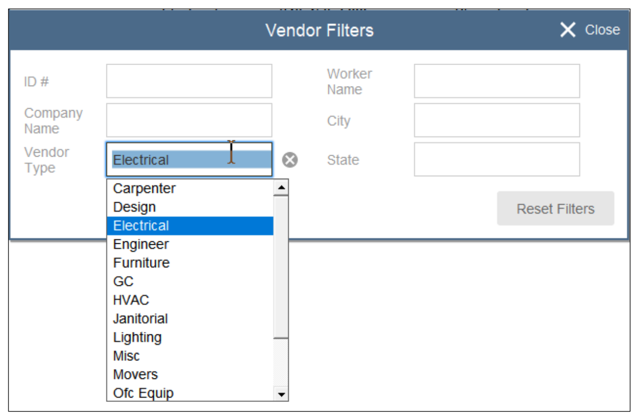


Figure 220 Document Filters

Click the **FILTERS** button. Performo displays the Filters data entry window. Enter data into as many filters as necessary to find the record or records to investigate, analyze and, or manage. Click the **DELETE VALUE** button depicted by a white x in a grey circle to remove the value from that field. When a field is blank in the filters data entry window, Performo will not consider data in that field when finding matching records.

Click the **RESET** button in the Vendor Filters dialog box to start over. Click the **X** button or the **CLOSE** button. Performo displays records matching values entered. Click the **RESET** button on the Actions Bar to display the standard found set.

Click the **+** button on the Actions Bar of the Vendor List view. Performo creates a new, blank record and displays it in detail view.

▷Video [VENDOR DETAIL VIEW]

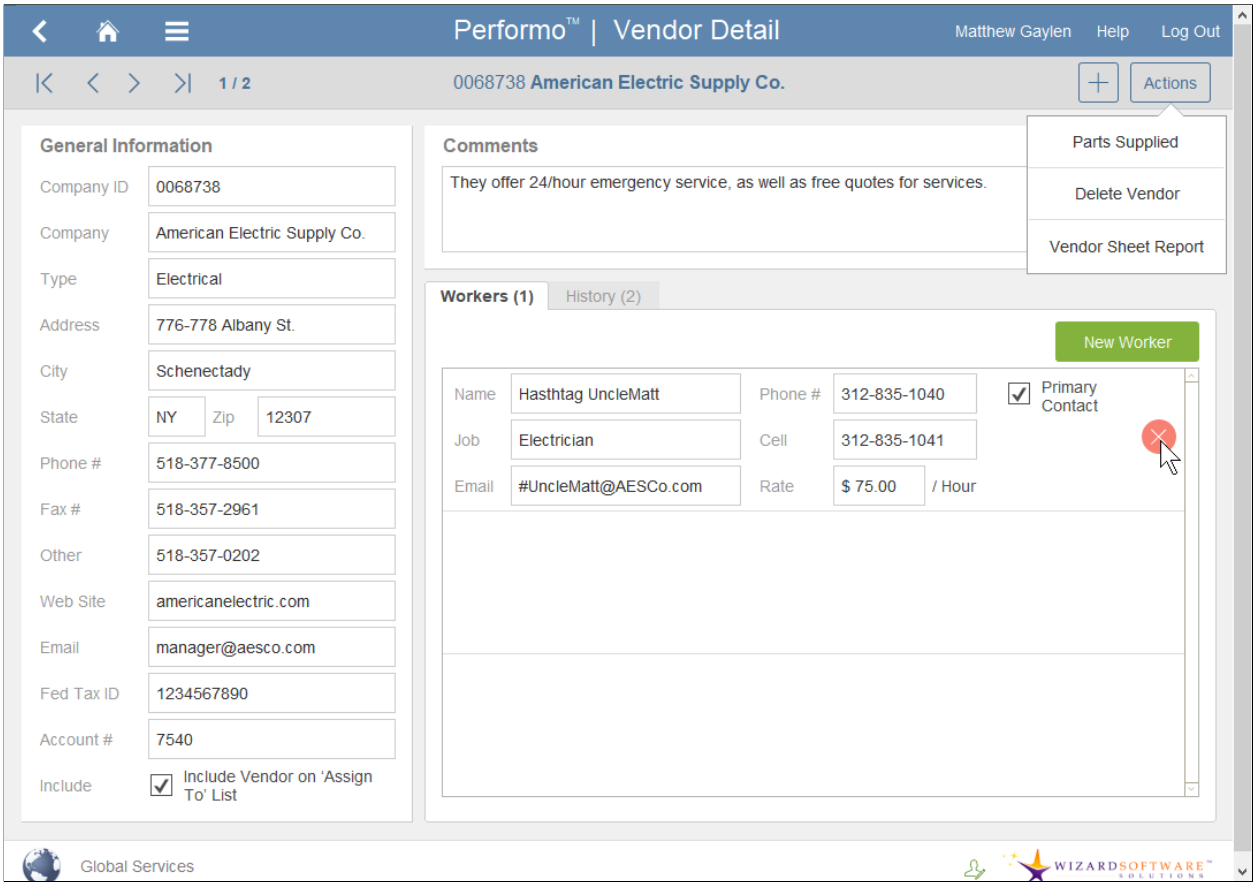


Figure 221 Vendor Detail View

Hover over any vendor record. Performo displays the vendor with a yellow highlight. Click anywhere highlighted part of the row. Performo displays the detail view for that vendor. The Vendor Detail view is divided into three sections: General Information, Comments, and tabs for Workers, and History.

▷Video [VENDOR LIST VIEW - GENERAL INFORMATION]

General information includes: Company ID, Company name, Type, Address, City, State, Zip, Phone #, Fax #, Other, Website, Email, Federal Tax ID, Account #, and the Include checkbox.

Click the **INCLUDE** checkbox. Performo will include the vendor on the Assign To value list in the Work Orders module.

The Type value list is user definable. Click the **EDIT…** option at the bottom of the value list. Performo displays Edit Value List "VendorTypes" text box. A hyphen on a line by itself create a separator line between sections of values. See Figure 13 on page #25.

VENDOR DETAIL – COMMENTS SECTION

The Vendor Detail Comments section is a text field. Any text may be entered.

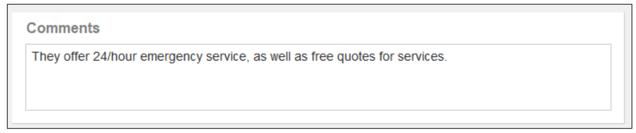


Figure 222 Vendor Detail - Comments Section

VENDOR DETAIL – WORKERS TAB

The Vendor Detail Workers tab displays workers specific to the vendor.

Data includes worker Name, Job, Email address, Phone #, Cell phone number, Rate per hour, and a checkbox to indicate whether or not that 'worker' is the primary contact for that vendor.

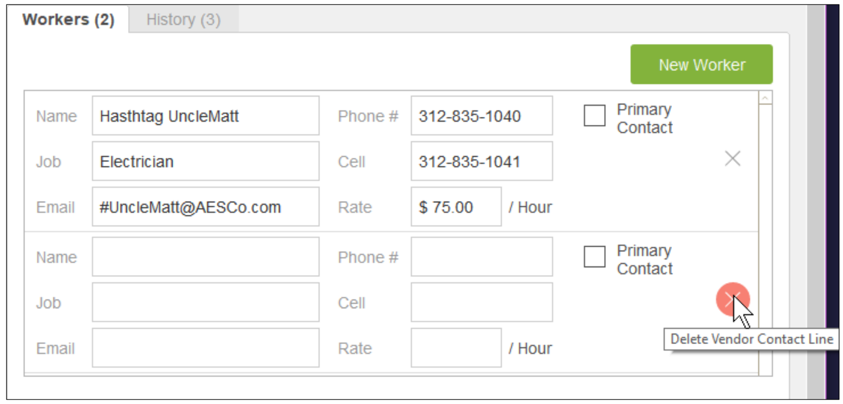


Figure 223 Vendor Detail - Workers Tab

Click the **DELETE** button which his depicted by a white x in the red circle on the right side of the portal record. Performo opens the, "Delete this contact?" message window. Click the **OK** button. Performo permanently deletes the worker. Click the **CANCEL** button. Performo returns to the Workers portal view.

Click the green **NEW WORKER** button. Performo creates a new blank record in the portal. Enter data as needed. The Job value list includes the Edit… option. See Figure 13 on page #25 for instructions on how to use the Edit… option.

VENDOR DETAIL – HISTORY TAB

Click the **HISTORY** tab. Performo displays a list of work orders having been completed by, and currently assigned to the vendor.

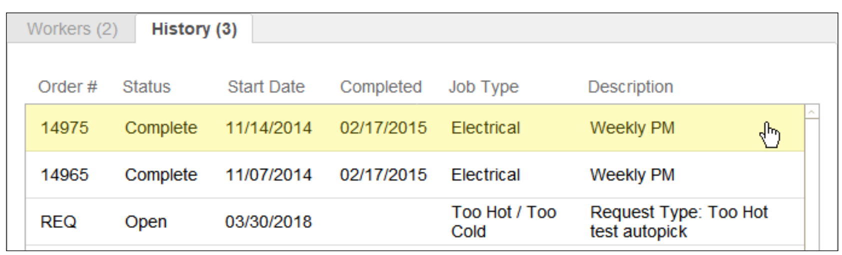


Figure 224 Vendor Detail - History Tab

Hover the mouse of any record. Click any record. Performo navigates to the Work Orders module and displays the Overview tab of the Work Order Detail view. Click the **BACK** button. Performo returns to the History tab of the Vendor Detail view.

VENDOR DETAIL – ACTIONS BAR

Figure 225 Vendor Detail - Actions Bar

The Actions Bar on the Performo Vendor Detail view is divided into three sections. The left section displays navigation buttons. Click the navigation buttons to view the first, previous, next and last records in the found set. See **FOUND SET** on page #15.

The center section of the Actions bar on the Vendor Detail view displays the part number and the part name.

The right section of the Actions bar on the Vendor Detail view displays the **ADD NEW RECORD** button which is depicted in the shape of a plus sign in a grey square, and the Actions Menu button.

Click the **ACTIONS** button on the Actions Bar of the Vendor Detail view. Performo displays the value list options. Value list options on the Actions Menu are Parts Supplied, Delete Vendor, and Vendor Sheet Report.

VENDOR DETAIL – ACTIONS – PARTS SUPPLIED

Click the **PARTS SUPPLIED** option on the Actions Bar of the Vendor Detail view. Performo navigates to the Parts Inventory module and displays a found set of the items that vendor supplies on the Parts Inventory List view. Click the **BACK** button to return to Vendor Detail.

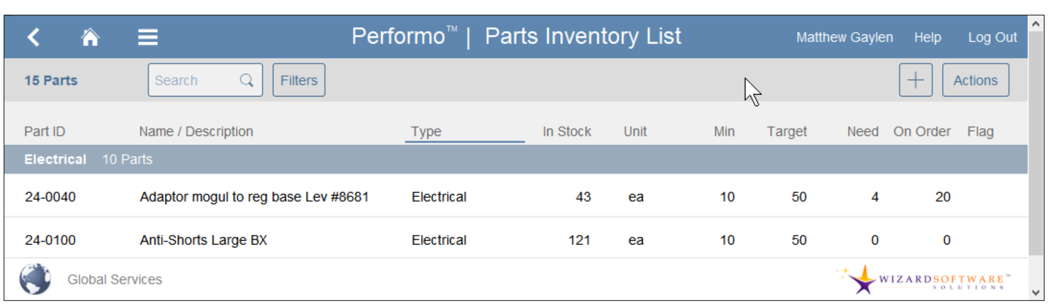


Figure 226 Parts Supplied Displayed on the Parts Inventory List view

VENDOR DETAIL – ACTIONS – DELETE VENDOR

Click the **DELETE VENDOR** option on the Actions Bar of the Vendor Detail view. Performo displays the Delete Vendor message box. Click the **OK** button. Performo permanently deletes the vendor. Deleting a vendor does not delete any records in the Work Order module to which the vendor was assigned.

VENDOR DETAIL – ACTIONS – VENDOR SHEET REPORT

Click the **VENDOR SHEET REPORT** option on the Actions Bar of the Vendor Detail view. Performo displays the Edit Report Title dialog. Option one is to edit the report title. Option two is to accept the standard title. Click the Ok button. Performo displays the Vendor Sheet Report Preview screen.

Performo displays the Transaction Totals by Part Code report preview screen. The trailing grand summary appears at the end of the last page of the report.

Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

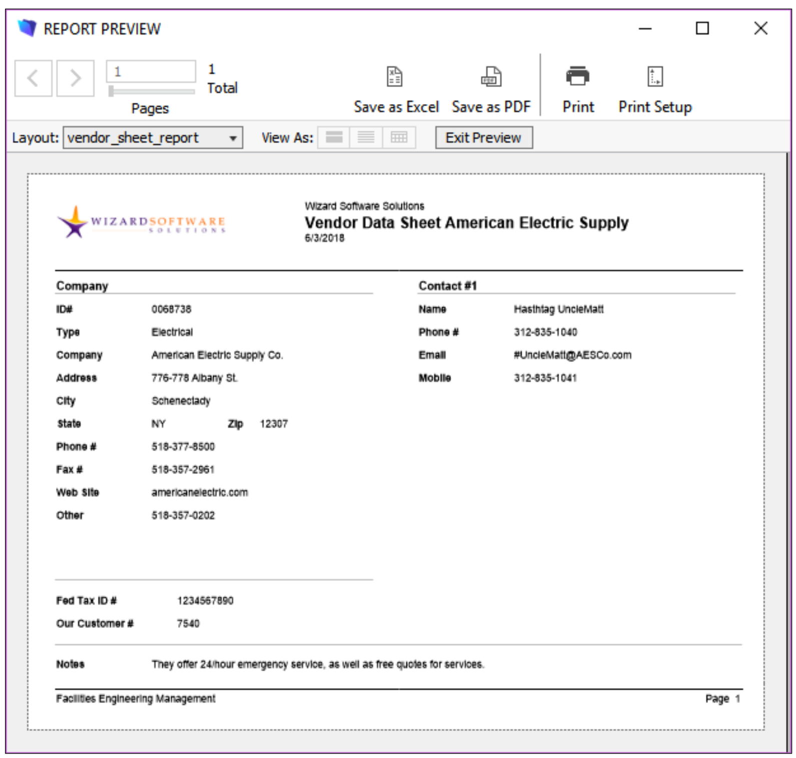


Figure 227 Vendor Detail - Vendor Data Sheet

If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

Click the **EXIT PREVIEW** button to return to the Vendor Detail.

Workers Module

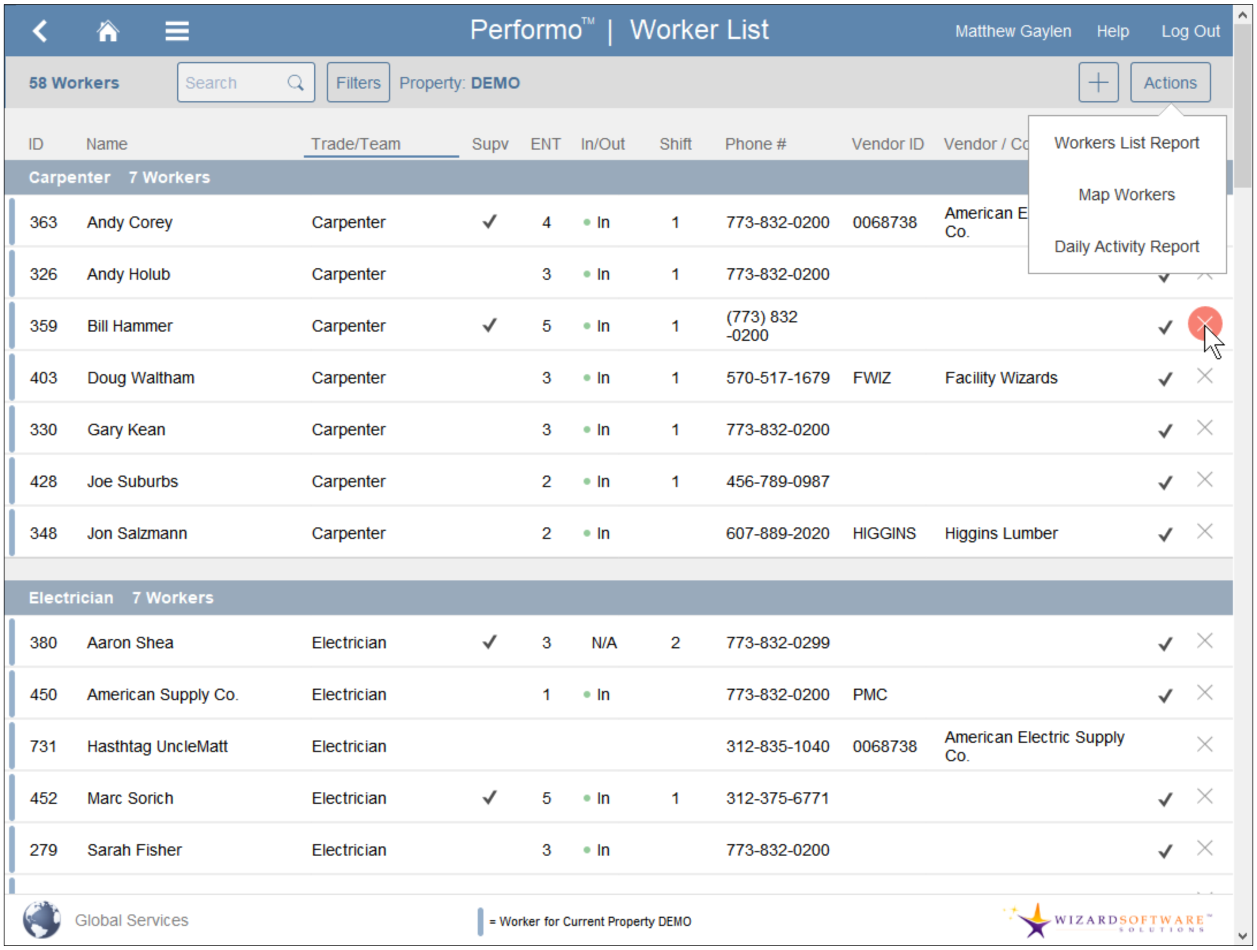


Figure 228 Worker Detail View

The workers module is for tracking, managing and reporting about tool-bearing maintenance staff. Please note that workers can be custodians, engineers, janitors, or whatever terms is used by the company, corporation, or institution.

▷Video

Worker List View

The Worker List view displays sortable columns for worker ID, Name, Trade/Team, Supervisor check box, Entities assigned to, In/Out status, Shift number, Phone #, Vendor ID, Vendor / Company, and a Track worker checkbox.

Click the column heading to sort by that value. When it makes sense, Performo will automatically sub-sort the list and display subheadings with summary numbers. Actions on the Worker List include Worker List Report, Map Workers, and Daily Activity Report.

Click the **DELETE** button on the right side of the row to delete a worker.

WORKER LIST VIEW – ACTIONS MENU – WORKER LIST REPORT

Click the Workers List report on the Actions Menu of the Actions bar on the Worker List view.

Performo displays the Edit Report Title dialog box. Option one is to edit the report title. Option two is to accept the standard title. Click the **OK** button. Performo displays the Vendor Data Sheet Preview screen.

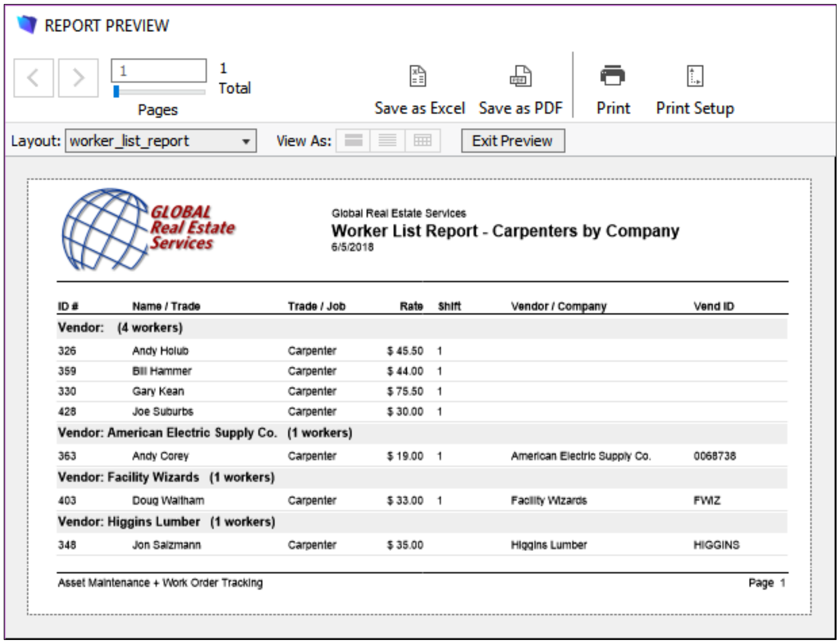


Figure 229 Worker List Report Preview Screen

Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

Click the **EXIT PREVIEW** button to return to the Worker List view.

WORKER LIST VIEW — ACTIONS MENU — MAP WORKERS

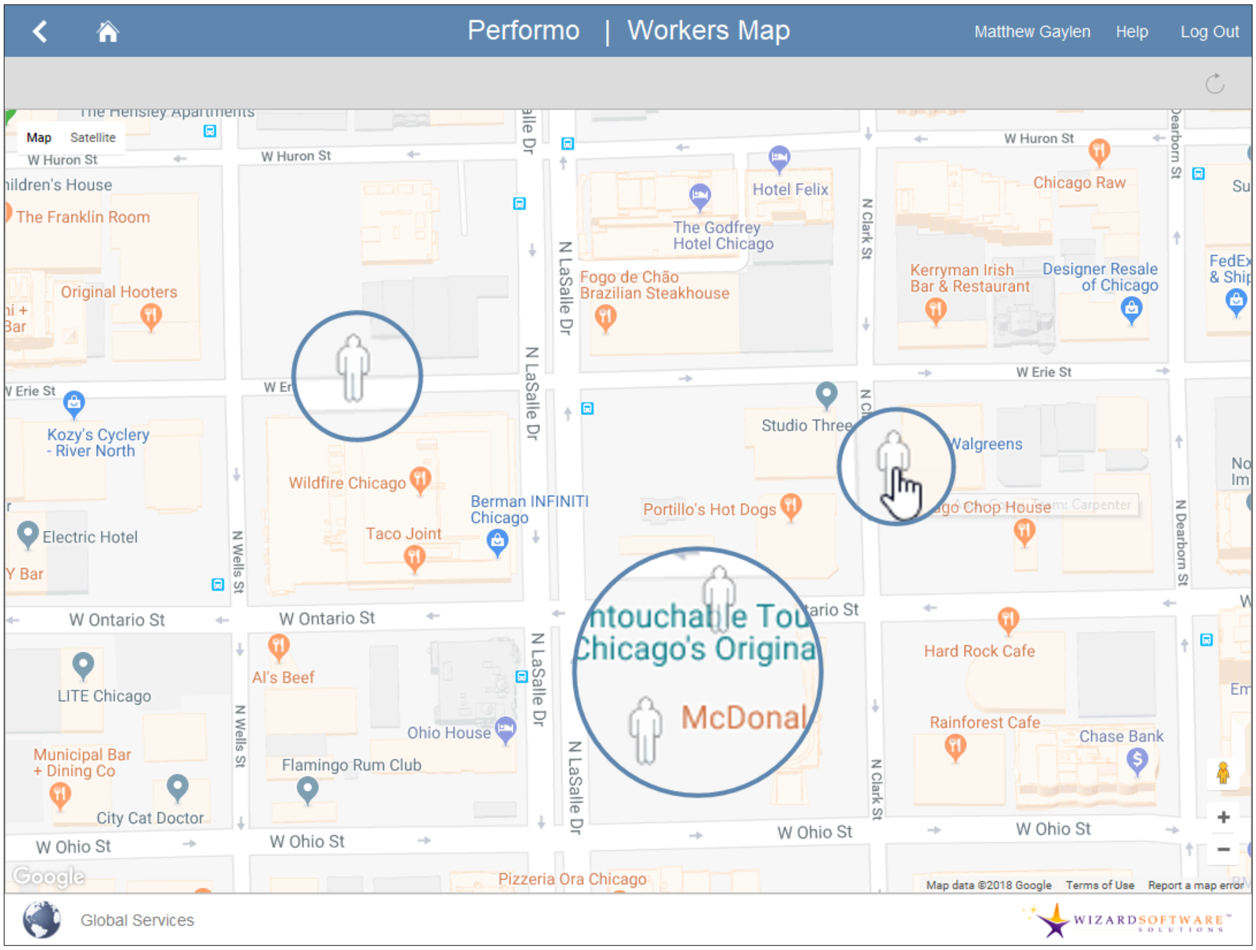


Figure 231 Worker List View - Actions Menu - Map Workers

Click the **MAP WORKERS** option on the Actions menu on the Actions bar of the Worker List view. Performo displays the workers on the map. The Solution Admin sets up worker tracking with the Wizard Software Project Manager and Project Engineering team. Light colored workers are inactive… Active workers are shaded darker.

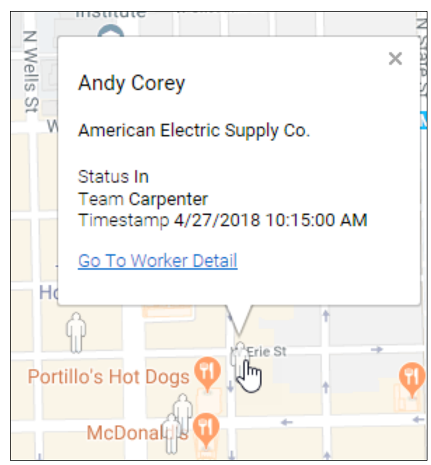


Figure 230 Mapped Worker Data

Click the worker icon. Performo displays a Worker Data balloon. Worker Data displayed includes contact info, time stamp data and the Go To Worker Detail hotlink. Click the **GO TO WORKER DETAIL** hotlink. Performo navigates to the Worker Detail view. Or click the **X** button in the upper right-hand corner to close the data balloon.

Worker Detail View

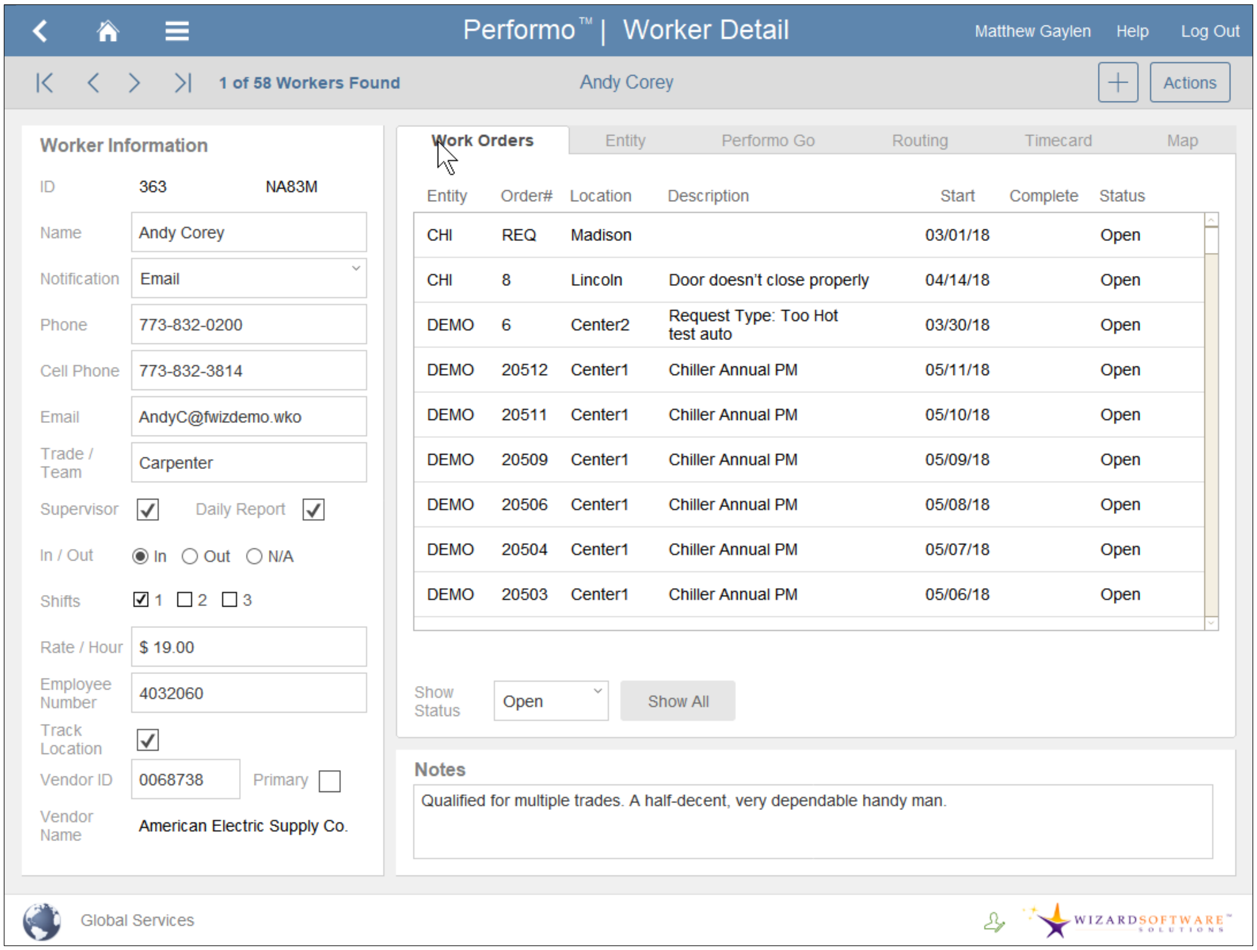


Figure 232 Worker Detail View

The Worker Detail view is divided into three sections. The section on the left is Worker Information. The section on the right is divided into tabs for Work Orders, Entity assignment, Performo Go access, Routing, Timecard, and Map.

▷Video

WORKER DETAIL – WORKER INFORMATION

The Worker Information section displays details including, Name, Notification preference, Phone number, Cell Phone number, Email address, Trade / Team, the Supervisor checkbox, the Daily Report checkbox, In/Out status radio buttons, Rate / Hour, Employee Number, Track Location checkbox, Vendor ID number, Primary contact checkbox, and Vendor Name.

WORKER DETAIL – NOTES

The bottom of the right side can be used to enter a couple of lines of text about the worker. Note that everybody with access to Performo's Worker Detail view can see the notes.

WORKER DETAIL – IN/OUT RADIO BUTTONS

Click the **IN** radio button (see Figure 232 previous page). If the worker has a system user record, then Performo will mark the user In on the Team tab of the Home screen.

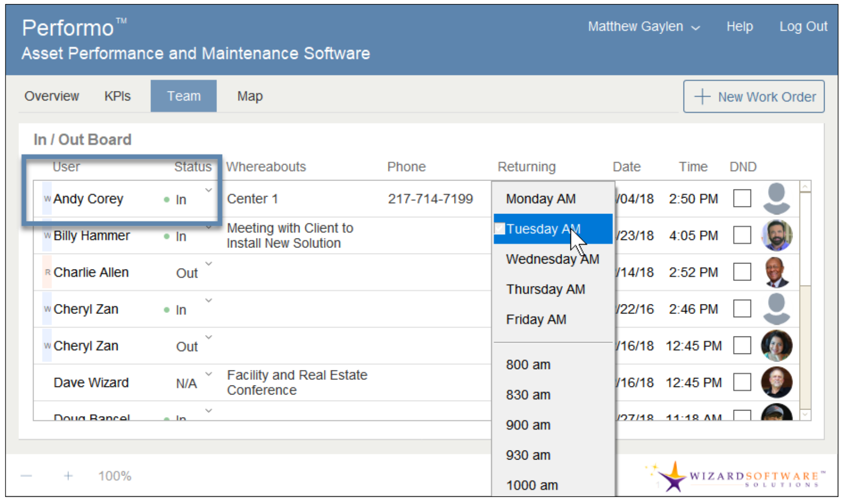


Figure 233 Home Screen > Team Tab > In / Out Board

User definable details on the Team tab of the Home Screen are Status, Whereabouts, Phone, the Returning value list, and DND. Click the DND checkbox. Performo turns the In / Out record light red to signify that nobody should bother this user.

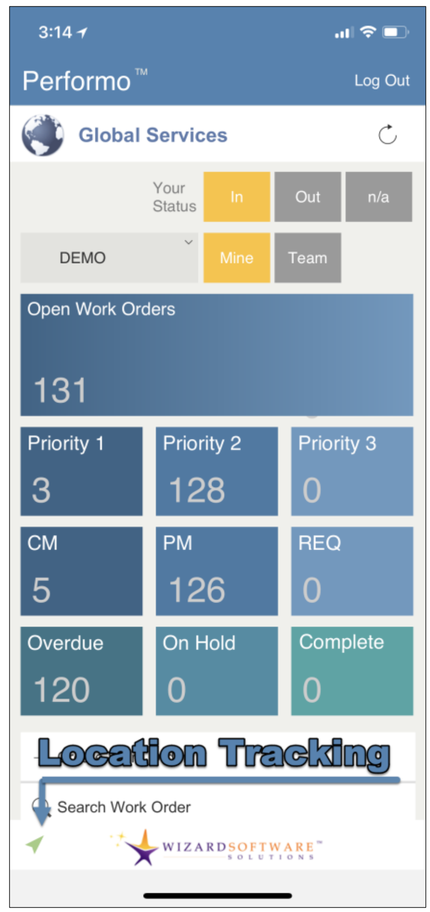


Figure 234 iPhone Screen Shot

WORKER DETAIL – LOCATION TRACKING CHECKBOX

Click the **TRACK LOCATION** checkbox. (see Figure 232 previous page). Performo starts tracking the user when they are connected to the solution via FileMaker Go, and they have location tracking services enabled. By default, FileMaker Go will ask users to enable tracking services when the application launches. In Performo, the worker's location is displayed on the Map tab of the Worker Detail view.

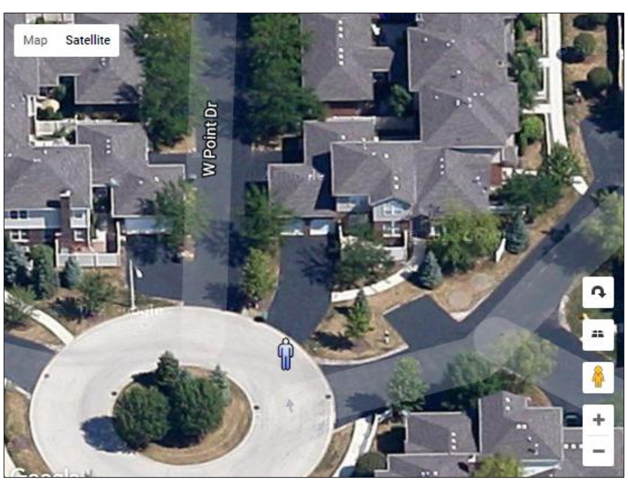


Figure 235 Worker Detail Map Tab

▷Video **WORKER DETAIL – WORK ORDERS TAB**

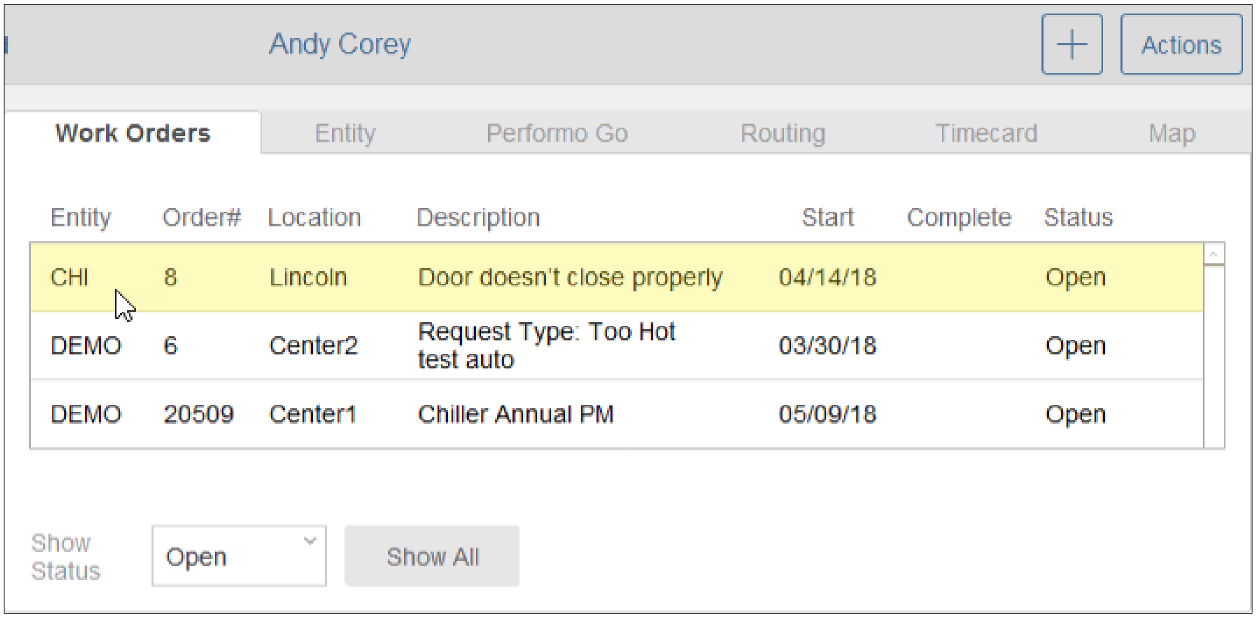


Figure 237 Work Order Detail - Work Orders Tab

Click the **WORK ORDERS** tab. Performo displays the work orders having been assigned to that worker. Click any work order in the portal. Performo automatically navigates to the Work Orders module and displays the detail view. Click the **BACK** button to return to the Worker Detail view.

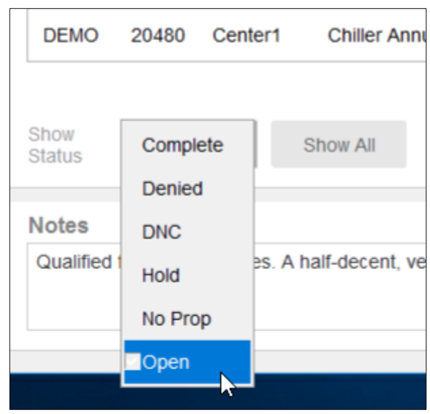


Figure 236 Show Status Value List

The Show Status value list displays values for Complete, Denied, DNC (Did Not Complete), Hold, No Prop (property or entity), and Open. Click the **SHOW ALL** button. Performo displays all the work orders having been assigned to that worker.

▷Video **WORKER DETAIL – ENTITY TAB**

Click the **ENTITY** tab. Performo displays the worker entities. When a worker is assigned to an entity, that worker's name appears in the Assign To value list in the Work Orders module. What this means is that work orders in this entity can be assigned to this worker.

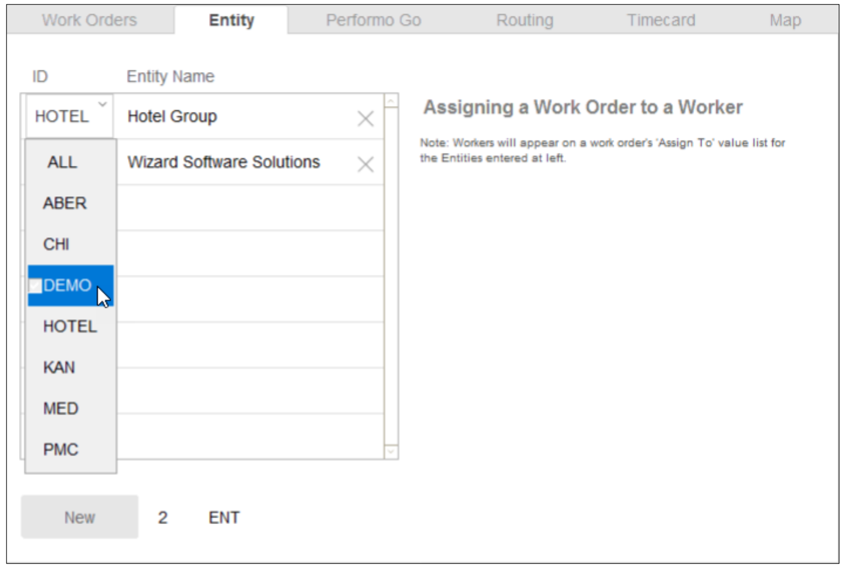


Figure 238 Worker Detail - Entity Tab

Workers must be assigned to at least one entity. Although, at the same time, workers can be assigned to any and all the entities.

THE ALL ENTITY

The All entity does not add the worker to all the entities. The All entity is a special case. See entity on page #15. Basically, the All entity aggregates data from all the other entities. The All entity is used for reporting purposes and is not used for data entry. The All entity does not need to be called the All entity. Every company, corporation, or institution can come up with their own name for the aggregate property label.

Entity assignment will be discussed in greater detail in the Roles & Can Dos section of this user reference guide.

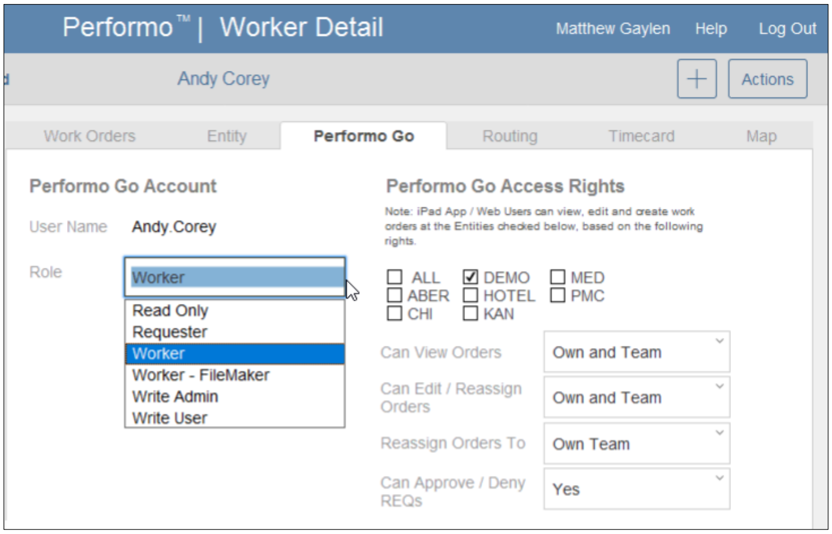


Figure 239 Worker Detail - Performo Go Account.

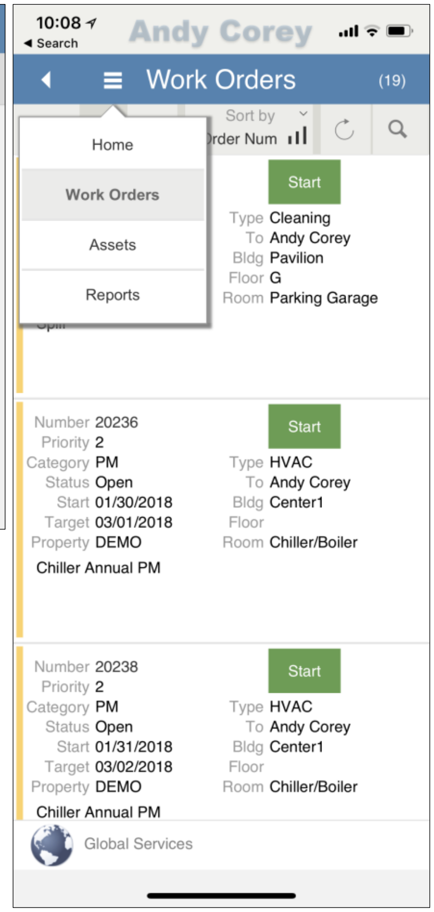


Figure 240 Performo Go, Worker Interface

PERFORMO GO

Performo Go is the remote worker interface. It works with FileMaker Go installed on an iPhone or iPad – Apple's iOS devices.

When the remote worker interface is in use; each user will have a System User account and Worker record. The Solution Admin creates the System User account, while any Write Admin user can create the worker record. Roles, Can-Dos and account set-up will be discussed in a subsequent chapter of this user reference guide.

▷Video WORKER DETAIL – PERFORMO GO TAB

Click the **PERFORMO GO** tab. The Performo Go tab displays the Performo Go Account and Performo Go Access Rights sections. The Performo Go Account section displays the user name from the Worker Information section. The Role value list contains options for Role. Roles are user-definable. Standard roles include; Read Only, Requester, Worker, Worker – FileMaker. Write Admin, and Write User. Roles, Can-Dos and account set-up will be discussed in a subsequent chapter of this user reference guide.

PERFORMO GO ACCESS RIGHTS

iOS and web users can view, edit, and create work orders at the Entities checked... Note that this is different that the buildings checkbox in the Routing tab. The Routing tab will be discussed next.

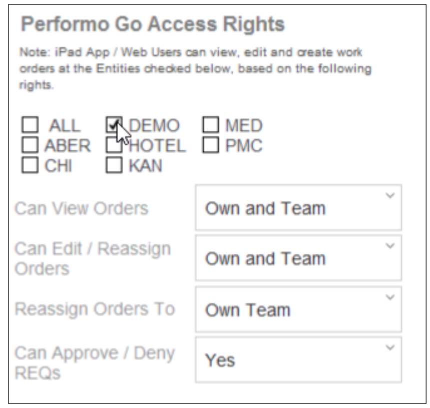


Figure 241 Performo Go Access Rights

Click the checkbox for each entity in which the worker should be able to view, edit, or create work orders. Note: click the **EDIT** checkbox. Performo will allow that user to edit work orders. Editing means the worker will be able to complete or, add time, and parts to a work order.

The Can View Orders value list displays options for Own, Own and Team, and All.

The Can Edit / Reassign Orders value list displays options for Own, Own and Team, All, and Limited. Limited is a special use case that applies to the Reassign Orders To value list.

The Reassign Orders To value list displays options for None, Own Supervisor(s), Own Team, All Supervisors, Own Team and All Supervisors, Anyone. Performo allows tight control over whose orders can be viewed and not only who has the privilege to reassign orders, but also, to whom those orders can be reassigned. Each facilities department will have rules about which values to choose.

The Can Approve / Deny REQs value list has options for **YES**, the worker can approve an REQ, and **NO**, the worker cannot approve an REQ. (REQ is pronounced are-ee-QUE). On the iPhone, workers tap the **RE-ASSIGN** button. Performo automatically displays a found set of workers. The found set consists of only the names to whom the worker has privileges to reassign.

Tap the name in the list at the bottom of the screen. Tap the **SUBMIT** button. Performo automatically reassigns the work order.

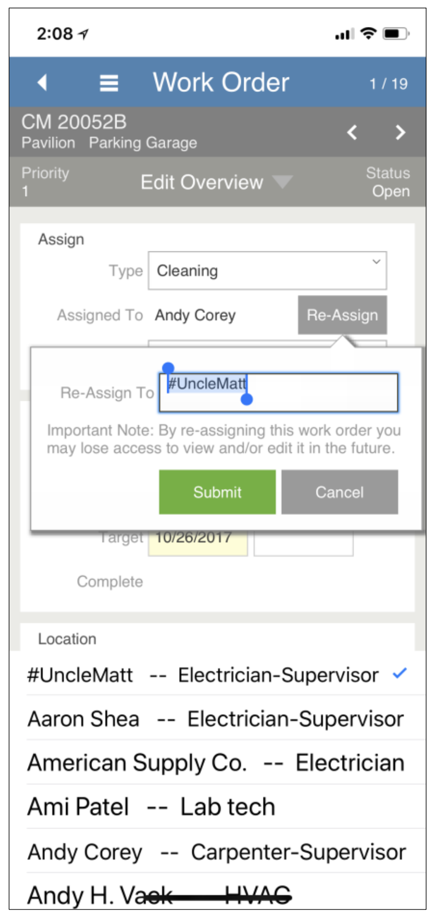


Figure 242 Reassign Worker on iPhone

▷Video **[WORKER DETAIL – ROUTING TAB]**

Click the **ROUTING** tab. Performo displays the Job Types portal and the Building IDs checkboxes.

Click the checkbox for each building that the worker is to be assigned work orders. Performo will display the worker's name in the Assign To field on the Work Order Detail view for every work order in each building checked. Click once to check. Click a checked box to deselect.

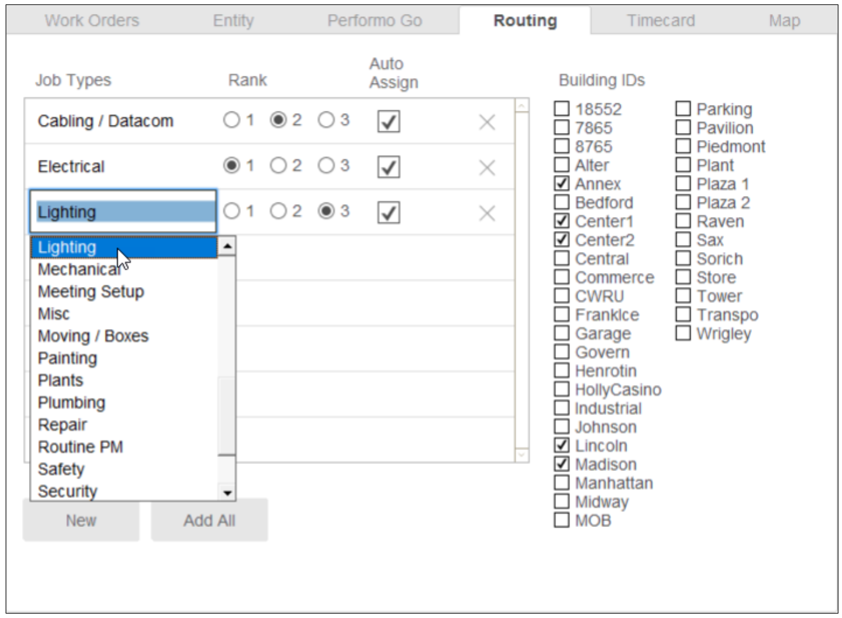


Figure 243 Worker Detail - Routing Tab

Click the **NEW** button. Performo adds a record to the portal. Use the Job Types value list to select a value.

Click the radio button corresponding to the rank. The worker will appear higher the Assign Worker data entry window. The Solution Admin has control over weighting factors.

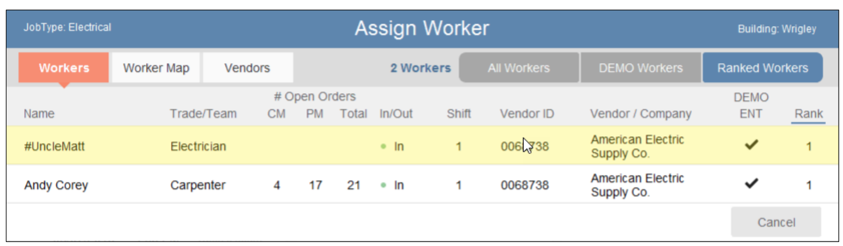


Figure 244 Assign Worker According To Rank

Click the **ADD ALL** button. Performo adds all the job types to the portal. Click a radio button to rank the worker for each job type.

▷Video **WORKER DETAIL – TIMECARD**

Click the **TIMECARD** tab. Timecard entries can be made by Write Admin users on the Worker Detail View.

Click the **NEW LINE** button. Performo displays a portal of timecard entries.

Click the date field. Performo displays the calendar. Navigate to a date. Performo displays the timecard entries for that date.

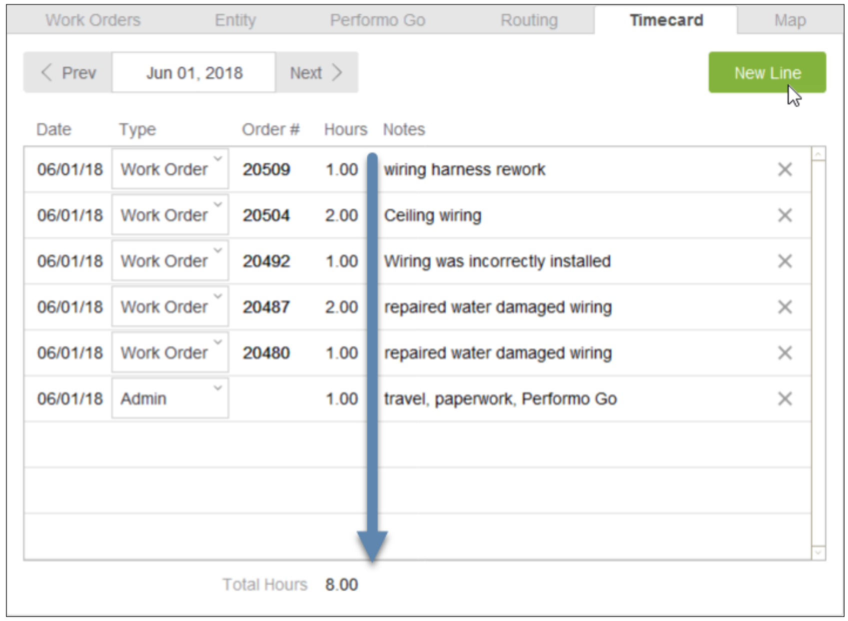


Figure 245 Worker Detail - Timecard

The date is entered automatically. The Type value list displays options for Work Order, Meetings, Admin, Training, Time Off, and Emergency. **WORK ORDER** will be entered automatically when the entry is created by a worker using Performo Go.

If Work Order is chosen by a Write Admin user, then the Order # will have to be entered manually. Best Practice: refer to the Work Orders tab to find numbers.

Hours is user definable by the Write Admin. Any number may be entered. Entries created with Performo Go will have a number already entered.

Notes is a user-definable text field. Any data may be entered.

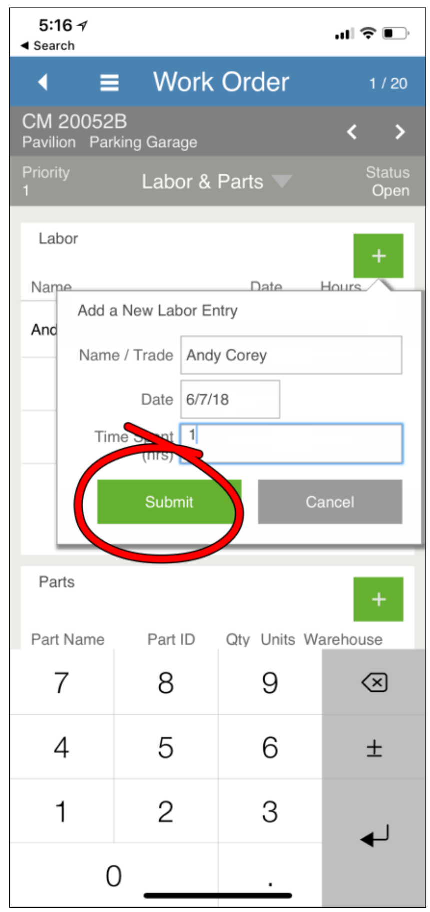


Figure 246 Performo Go Labor Entry

Hover over the x at the end of the row. Click the white x in the red circle. Performo will display the delete confirmation dialog box. Click the **OK** button to delete the timecard entry permanently. There is no undo.

WORKER DATIL - MAP

Click the **MAP** tab. Performo displays the Google Maps standard view. Click the **SATELLITE** button. Performo displays the satellite image. Use the zoom buttons to orient the map as desired.

The timestamp is displayed on the left of the map. The timestamp shows where the worker was when Performo Go was being used by the worker. An entry is made each time the worker logs in and uses Performo Go. For example, entries are made when workers log in. When workers tap the **START** button, when workers tap the **+** button to add labor.

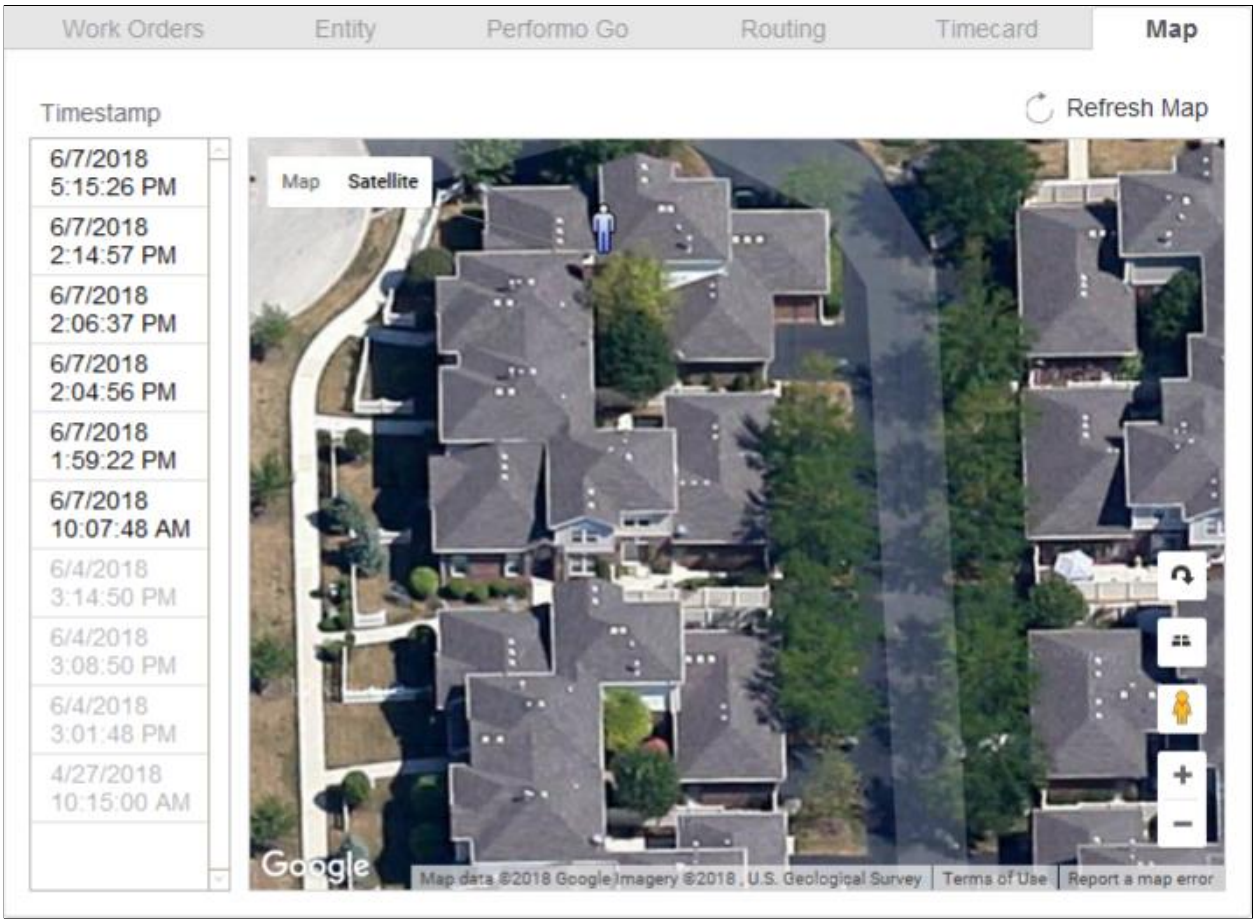


Figure 247 Worker Detail - Map

Staff Module

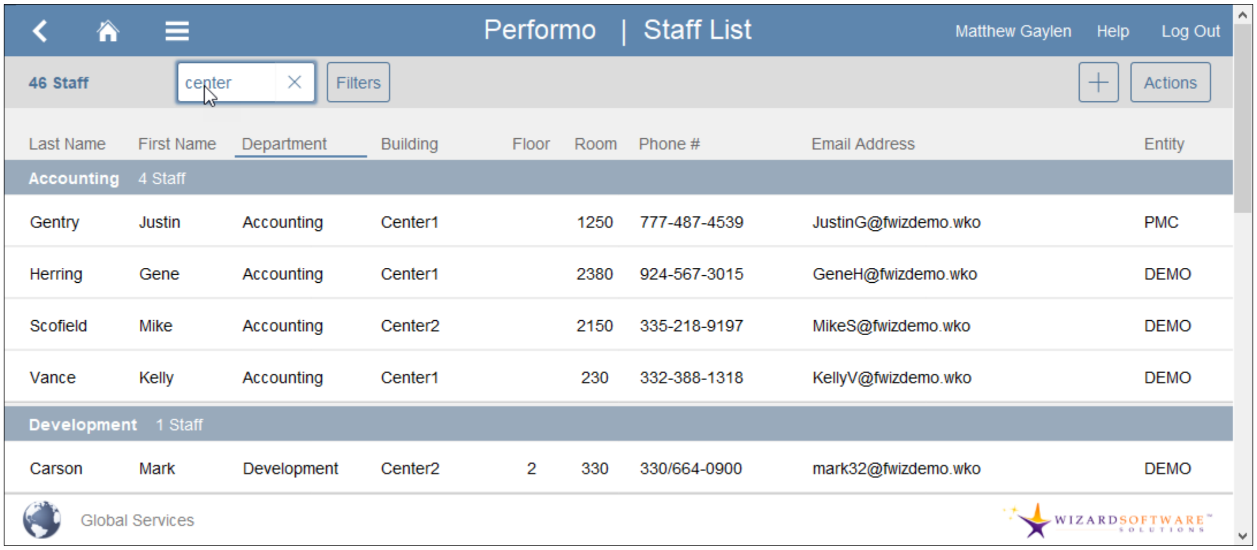


Figure 248 Staff List - Requestors

▷Video **Staff List View**

The Staff Module displays the list of people who request work orders. Please note that some systems are automatically populated from data provided by the HR Department. The implementation team works with Wizard software project management and engineering to set up the import.

The mobile and web interfaces provide a way for staff to log in. When they log in, Performo automatically enters their contact data from the Staff List.

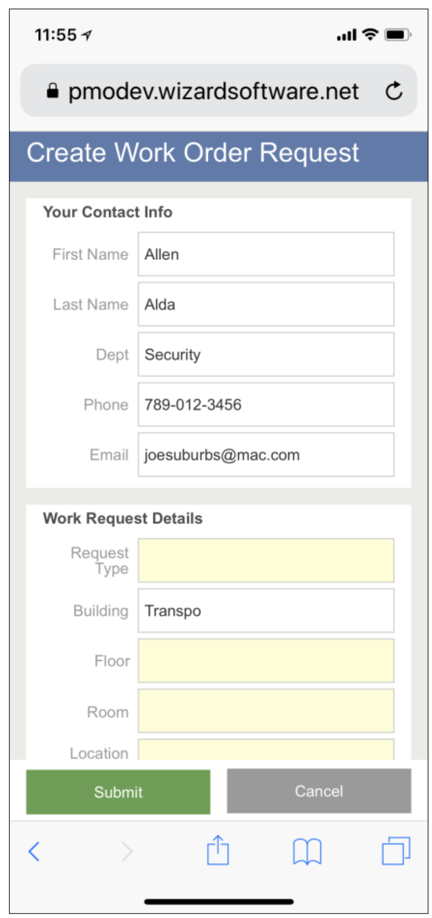
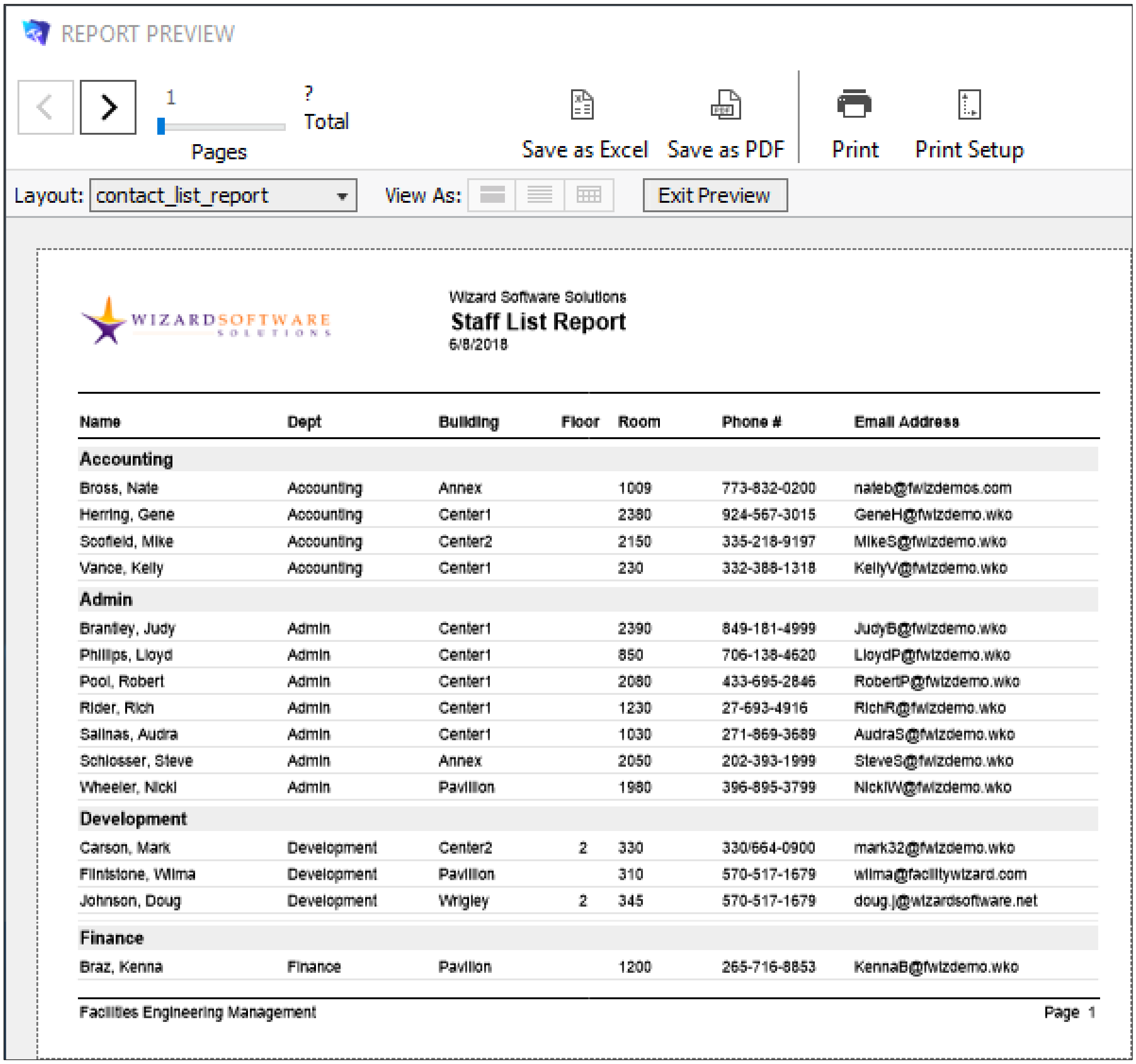


Figure 249 Mobile Requester Interface

ACTIONS ON STAFF LIST – STAFF LIST REPORT



Name	Dept	Building	Floor	Room	Phone #	Email Address
Accounting						
Bross, Nate	Accounting	Annex		1009	773-832-0200	nateb@fwizdemos.com
Herring, Gene	Accounting	Center1		2380	924-567-3015	GeneH@fwizdemo.wko
Scofield, Mike	Accounting	Center2		2150	335-218-9197	MikeS@fwizdemo.wko
Vance, Kelly	Accounting	Center1		230	332-388-1318	KellyV@fwizdemo.wko
Admin						
Brantley, Judy	Admin	Center1		2390	849-181-4999	JudyB@fwizdemo.wko
Phillips, Lloyd	Admin	Center1		850	706-138-4620	LloydP@fwizdemo.wko
Pool, Robert	Admin	Center1		2080	433-695-2846	RobertP@fwizdemo.wko
Rider, Rich	Admin	Center1		1230	27-693-4916	RichR@fwizdemo.wko
Salinas, Audra	Admin	Center1		1030	271-869-3689	AudraS@fwizdemo.wko
Schlosser, Steve	Admin	Annex		2050	202-393-1999	SteveS@fwizdemo.wko
Wheeler, Nicki	Admin	Pavilion		1980	396-895-3799	NickiW@fwizdemo.wko
Development						
Carson, Mark	Development	Center2	2	330	330/664-0900	mark32@fwizdemo.wko
Flintstone, Wilma	Development	Pavilion		310	570-517-1679	wilma@facilitywizard.com
Johnson, Doug	Development	Wrigley	2	345	570-517-1679	doug.j@wizardsoftware.net
Finance						
Braz, Kenna	Finance	Pavilion		1200	265-716-8853	KennaB@fwizdemo.wko

Facilities Engineering Management Page 1

Figure 250 Staff List Report

Click the **ACTIONS MENU** button on the Actions Bar on the Staff List view. Performo displays the Edit Report dialog box. Accept the default title or enter a new title. Click the **OK** button. Performo displays the report preview. Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button. Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report. Click the **EXIT PREVIEW** button to return to the Worker List view.

▷Video Staff Detail View – Create A Record For A New Person

Click the + button on the Actions Bar on either the Staff List view or the Staff Detail view. Performo will display a blank record in the Staff Detail layout.

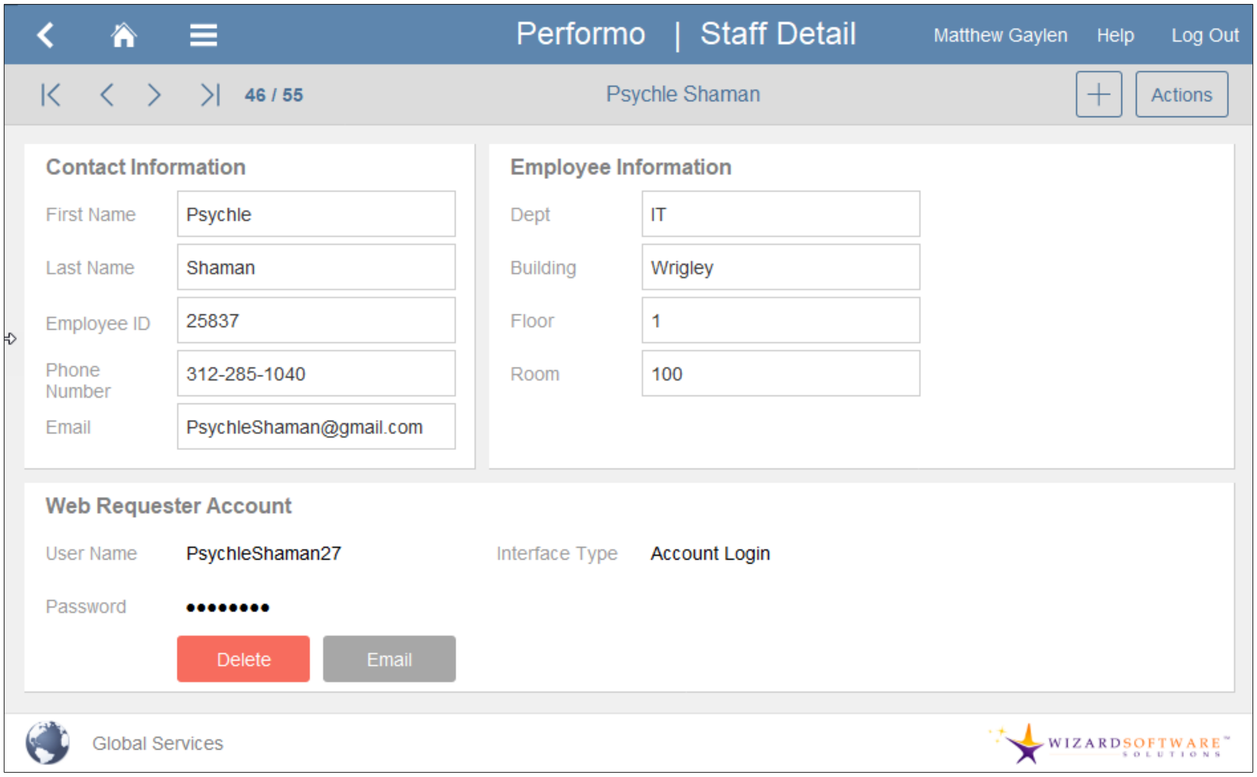


Figure 251 Staff Detail View

The Staff detail layout is divided into three sections: Contact Information, Employee Information, and, Web Requester Account.

Contact information includes fields for First Name, Last Name, Employee ID, phone Number, Email.

Employee Information includes Department, Building, Floor, and room.

WEB REQUESTER ACCOUNT

Under Web Requester Account click the green **CREATE** button. Performo displays the Web Requester Account dialog box.

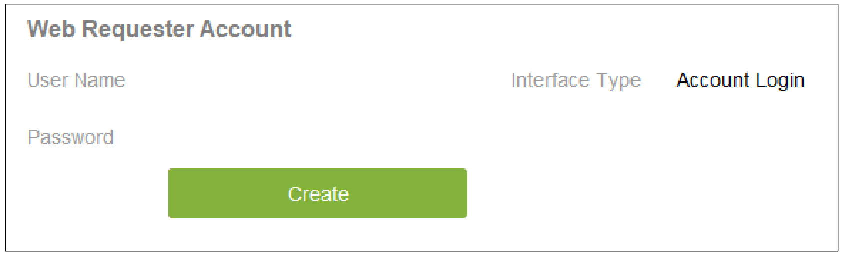


Figure 252 Web Requester Account Creation

The Web Requester Account dialog box displays the User name field and the Password field. Performo automatically enters a User name and a Password. However, both fields are user definable. Any data may be entered.

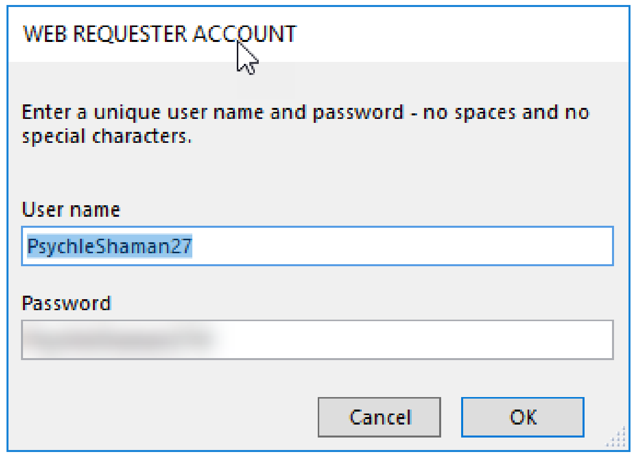


Figure 253 Web Requested Account

Click the **OK** button. Performo displays the Staff Detail view. Note that the Web Requester Account section is now complete. Performo also sends an email message to the user.

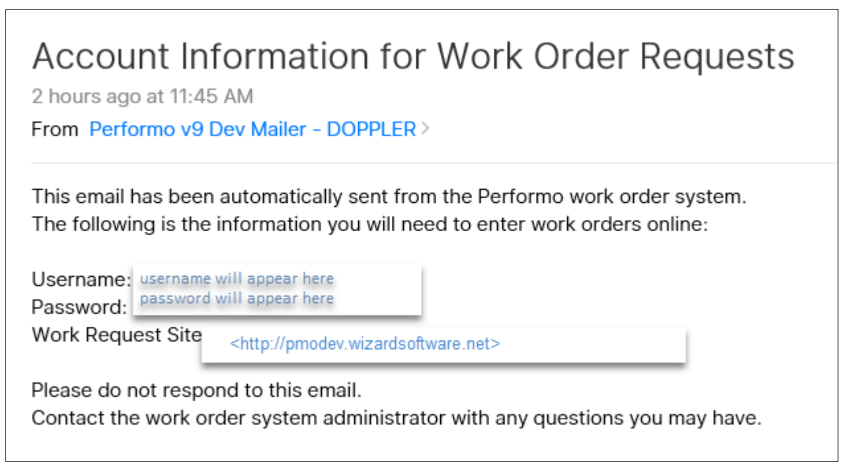


Figure 254 Account information for Work Order Requests

The email message contains the user name, the password and a hotlink to the Work Request Site.

Users can click the hotlink to navigate directly to the Web Requester web site.

Note that on the Web Requester Web site, the User name field is not case sensitive, but the Password field is. Please also note that every company's login screen might appear a little bit differently on screen.

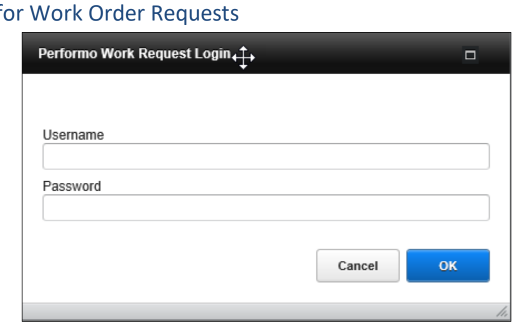


Figure 255 Performo Work Request Login

Buildings

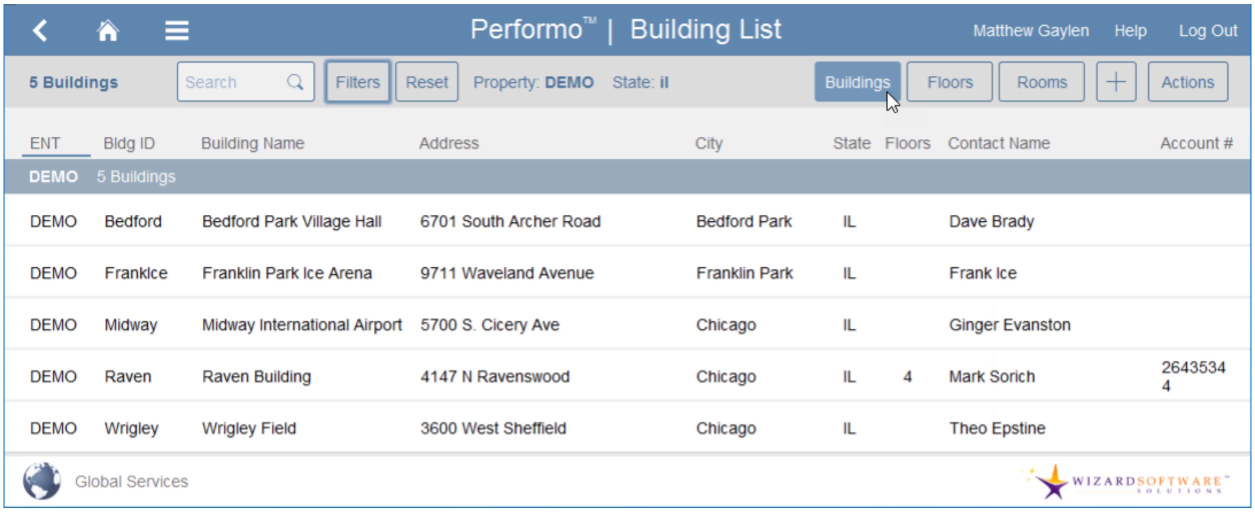


Figure 256 Buildings List View

The Buildings module stores data on buildings, floors and rooms for each entity in the solution.

▷Video Buildings List View

The Buildings list view displays one row for each building. Data displayed on list view includes, Entity, Building ID, Building Name, Address, City, State, Floors, Contact Name, and Account Number.

ACTIONS BAR

The Actions bar displays the number of items in the found set, the Global Search field, the **FILTERS** button, the **RESET** button (if Filters have been applied to the found set). Additionally, the Actions bar displays the filters that have been applied.

The right side of the Filters bar displays buttons; **BUILDINGS, FLOORS, ROOMS, ADD BUILDING**, and the **ACTIONS** menu.

Between, **BUILDINGS**, **FLOORS**, and **ROOMS**; the button that is lit up is the screen in use.

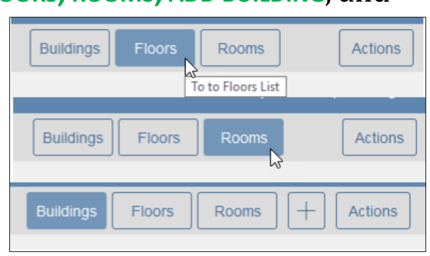


Figure 257 Buildings, Floors, Rooms

Click the + add record button. Performo displays the Message dialog: “Please be sure to enter a unique Building ID.” Click the **OK** button to proceed. Performo adds a new blank record to the portal. Click the new record to navigate to the Building Detail view. Data and information is entered on the Building Detail view.

ACTIONS MENU – MAP BUILDINGS

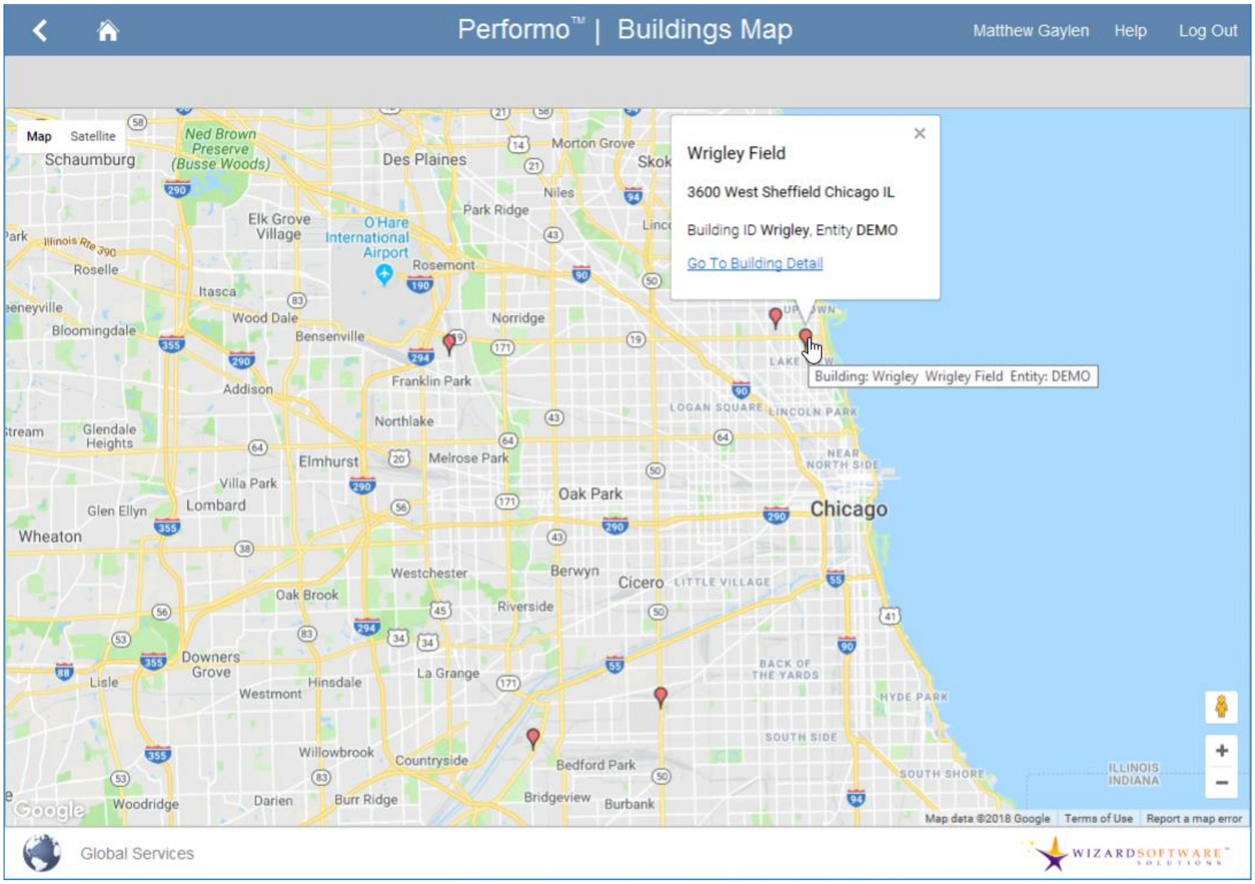


Figure 258 Map Buildings

Click the **ACTIONS MENU** button on the Actions Bar of the Building Detail view. Performo displays the buildings on a Google map. Each building is depicted by a red balloon. Hover over the balloon… The map displays the name of the building and the entity. Click the building balloon. The map displays a pop up call out. The pop up displays building name, address data, the Building ID, the Entity, and a hot link to navigate to Building Detail. Click the **GO TO BUILDING DETAIL** hotlink on the Google map pop up call out. Performo displays the building detail.

ACTIONS MENU – BUILDINGS REPORT

Click the **ACTIONS** menu button on the Actions bar on the Building List view. Performo displays the Edit Report Title dialog box.

Accept the default title or enter a new title.

Click the **OK** button. Performo displays the report preview.

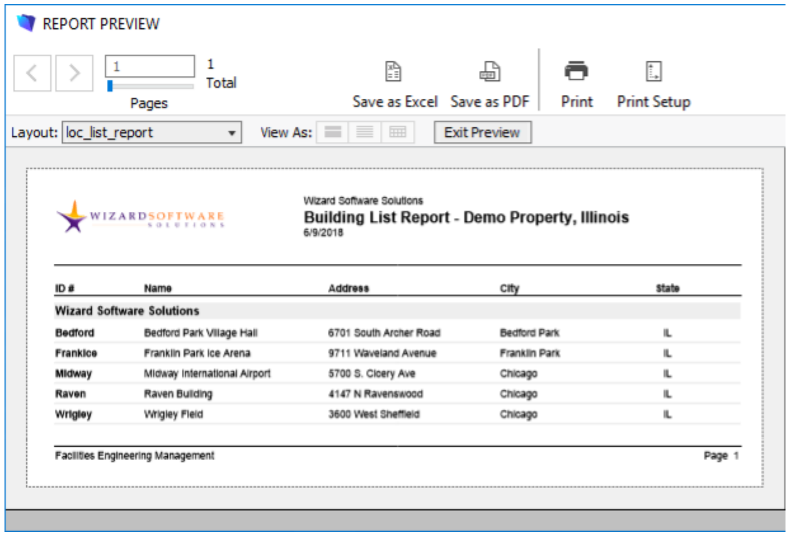


Figure 259 Buildings Report

Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

Click the **EXIT PREVIEW** button to return to the Building List view.

▷Video

Floors List View

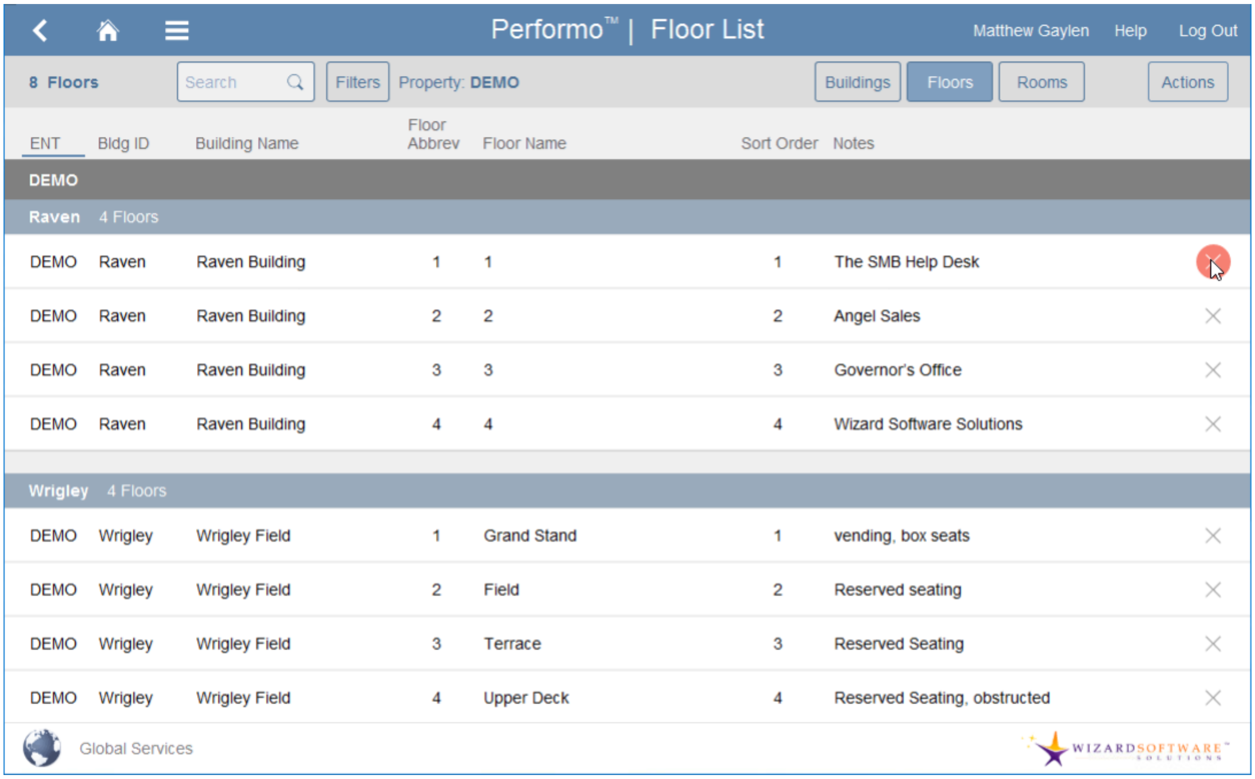


Figure 260 Floor List View

Click the **FLOORS** button on the Actions bar of Building List view or the Room List view. Performo displays the Floor List view. The Floor List view displays one row of data for each floor in the building. Data displayed includes, Entity, Building ID, Building Name, Floor Abbreviation, Floor Name, Sort Order, and Notes.

Click the delete button at end of the row. Performo displays the Delete Record dialog box. Confirmation is required because there is no undo.

FLOOR LIST REPORT

Click the **ACTIONS** menu button on the Actions bar on the Floor List view.

Click the **FLOORS** Report option. Performo displays the Edit Report Title dialog box.

Accept the default title or enter a new title.

Click the **OK** button.

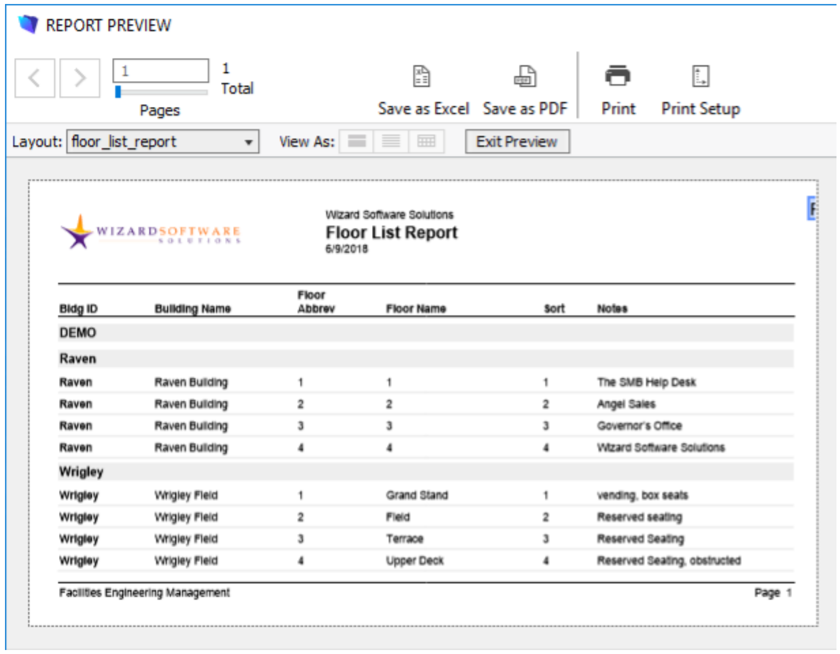


Figure 261 Floor List Report

Performo displays the report preview.

Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

Click the **EXIT PREVIEW** button to return to the Floor List view.

▷Video **Floor Detail View**

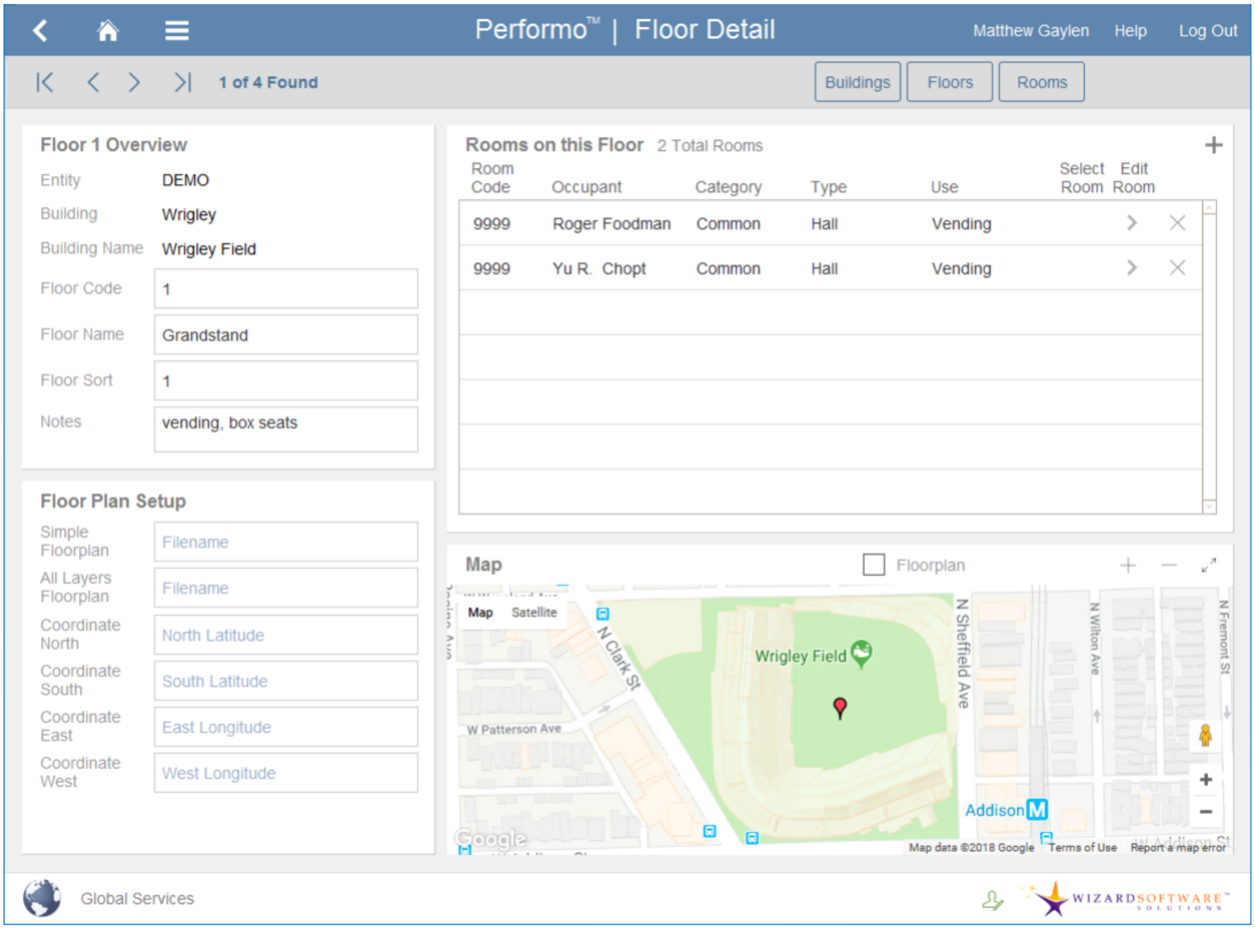


Figure 262 Floor Detail View

The Floor Detail view is divided into four sections. Floor <#> Overview displays values for Entity, Building, Building Name, Floor Code, Floor Name, Floor Sort, and Notes.

Contact the Solution Admin if Floor Plan Setup is required.

The Map displays the site location.

ROOMS ON THIS FLOOR

This section contains a portal of rooms. Data displayed includes, Room Code, Occupant, Category, Type, and Use. Click the DELETE button at the far right of any row. Performo deletes the room upon confirmation.

Click the EDIT ROOM button. Performo displays the Room Detail view.

Room Detail View

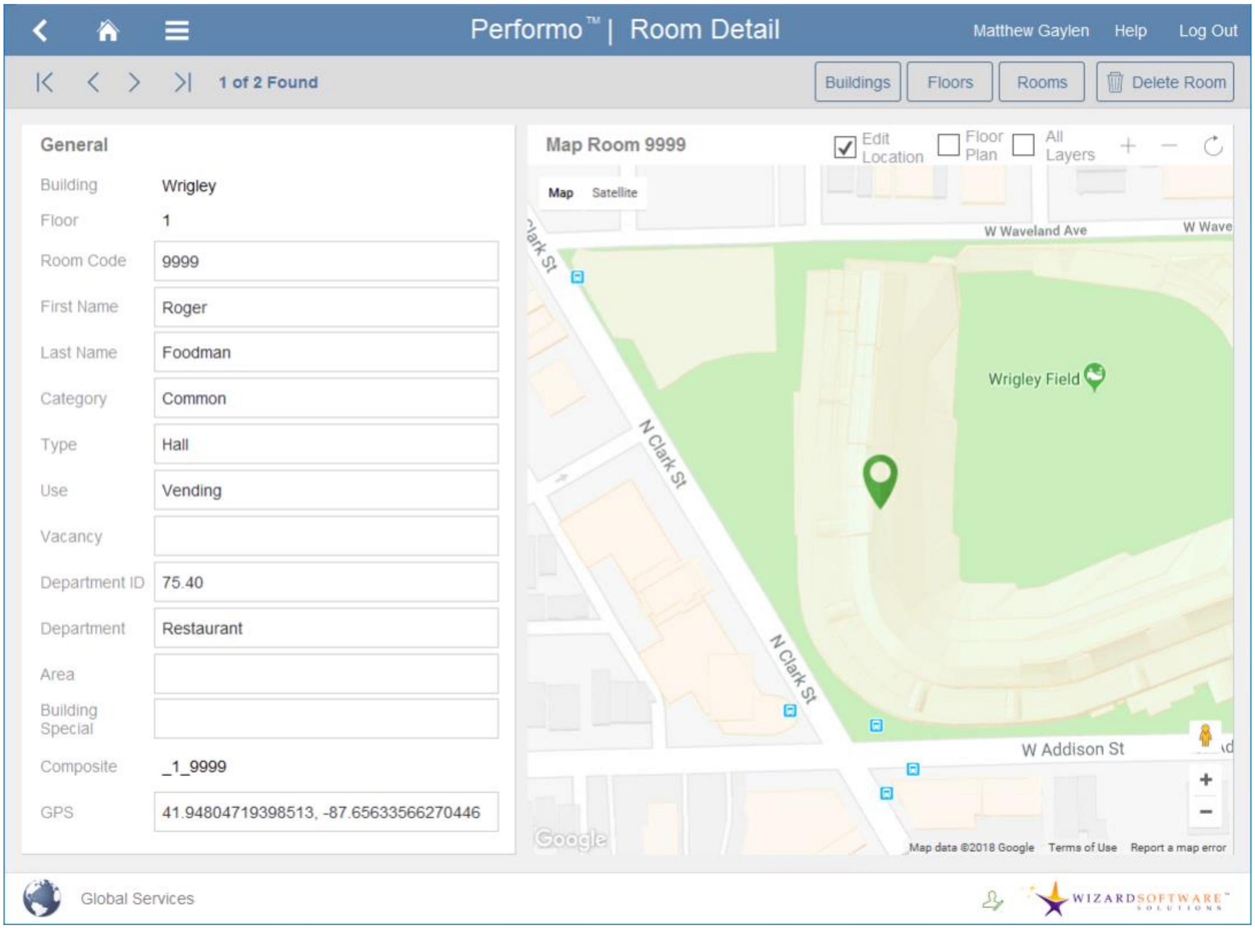


Figure 263 Room Detail View

The Room Detail view displays two sections; General and Map Room <#>.

The General section includes fields for, Building, Floor, Room Code, First Name, Last Name, Category, Type, Use, Vacancy, Department ID, Department, Area, Building Special, Composite, and GPS. All the fields are user-definable. The Solution Admin controls the Category value list. However, any data may be entered if the needed value is not in the list. Click the field a second time to place the cursor in the field. Performo will allow any information to be entered.

The Map Room <#> section displays the site location. Click the **EDIT LOCATION** checkbox. Then click on the map on the location of the room. Performo will record the GPS coordinates in the GPS field of the General section to the left. Click the **DELETE ROOM** button on the Actions bar. Performo will delete the room upon confirmation.

▷Video

Room List View

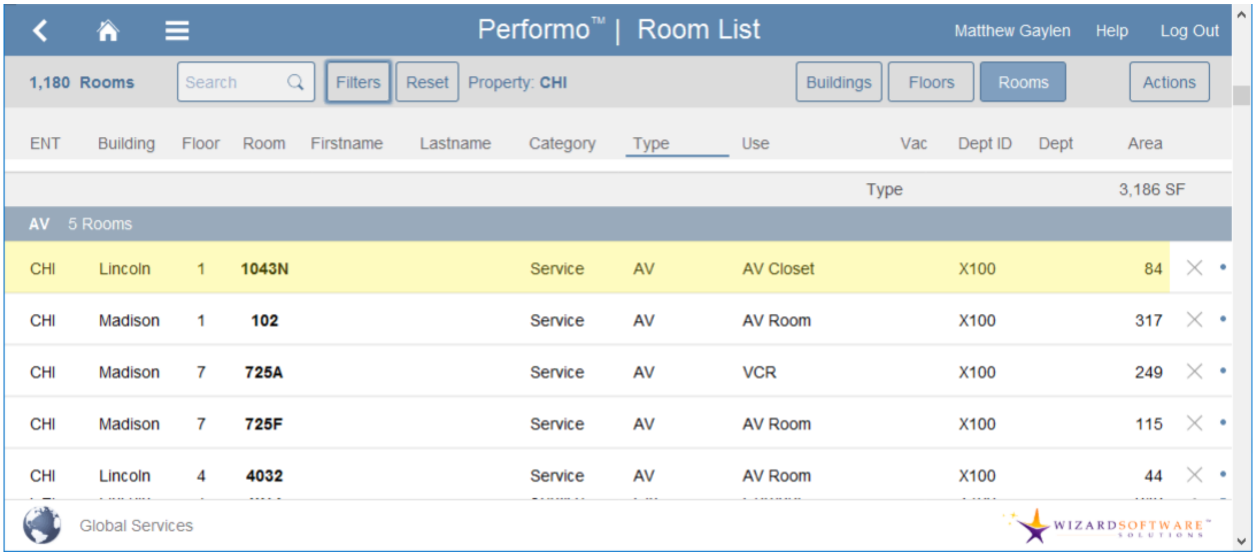


Figure 264 Room List View

Data displayed on the Room List includes Entity, Building, Floor, Room, First Name, Last Name, Category, Type, Use, Vacancy, Department ID, and Area as measured in square feet.

Click any room to view Room Detail. Click the x at the end of the row to begin the delete room process. Upon confirmation, the room is permanently deleted.

ACTIONS ON THE ROOM LIST – MAP ROOMS

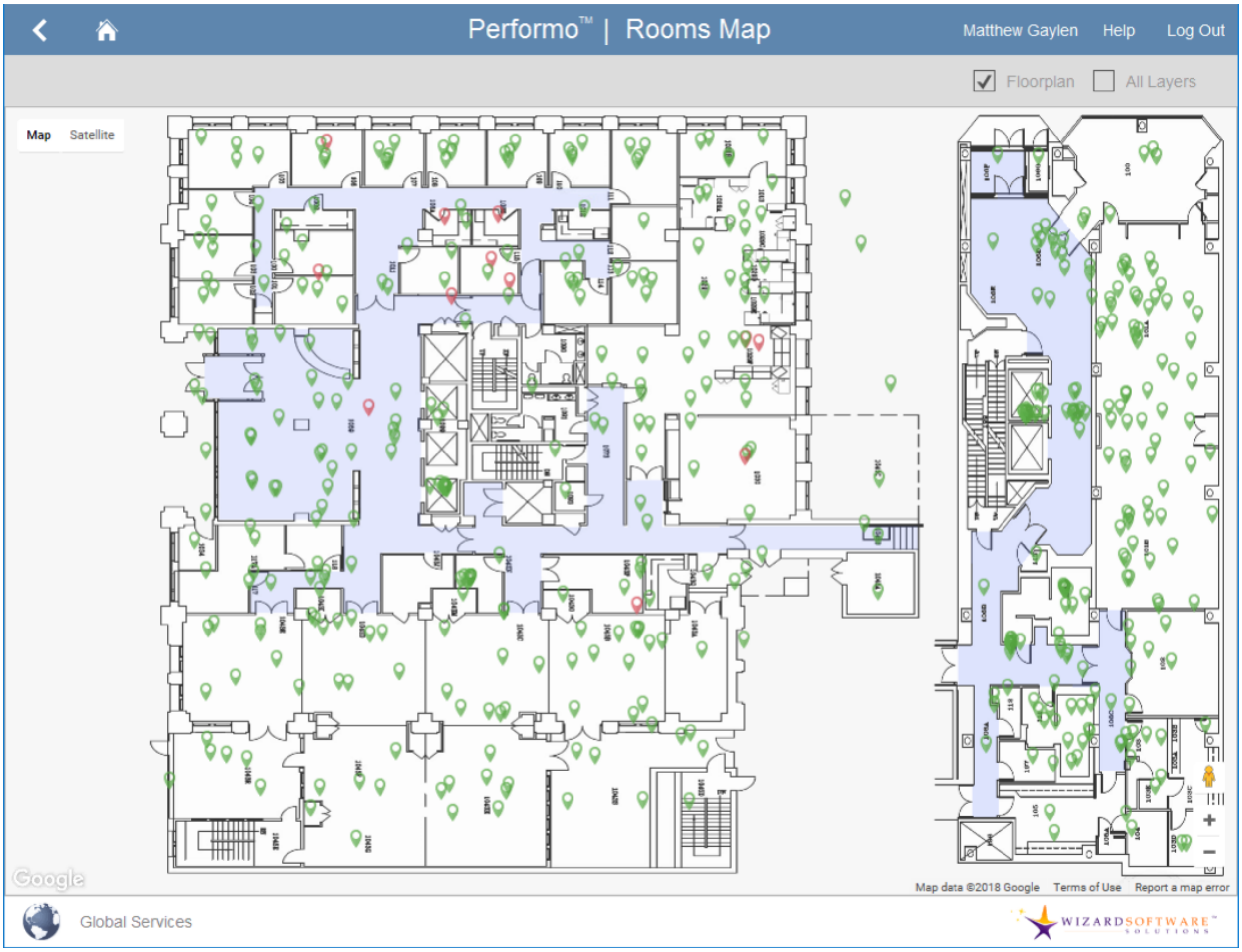


Figure 265 Map Rooms

The Rooms Map displays the rooms. Click the **FLOORPLAN** checkbox. If the floorplans module has been installed and configured, the rooms appear on the floor plan. Click any room to view the Room detail balloon. The Room Detail balloon displays room data including, Name, Category, Type, Use, Department ID, Department, and Vacancy. Click the **GO TO ROOM DETAIL** hotlink. Performo navigates to the Room Detail view.

ACTIONS ON THE ROOM LIST – ROOM REPORT

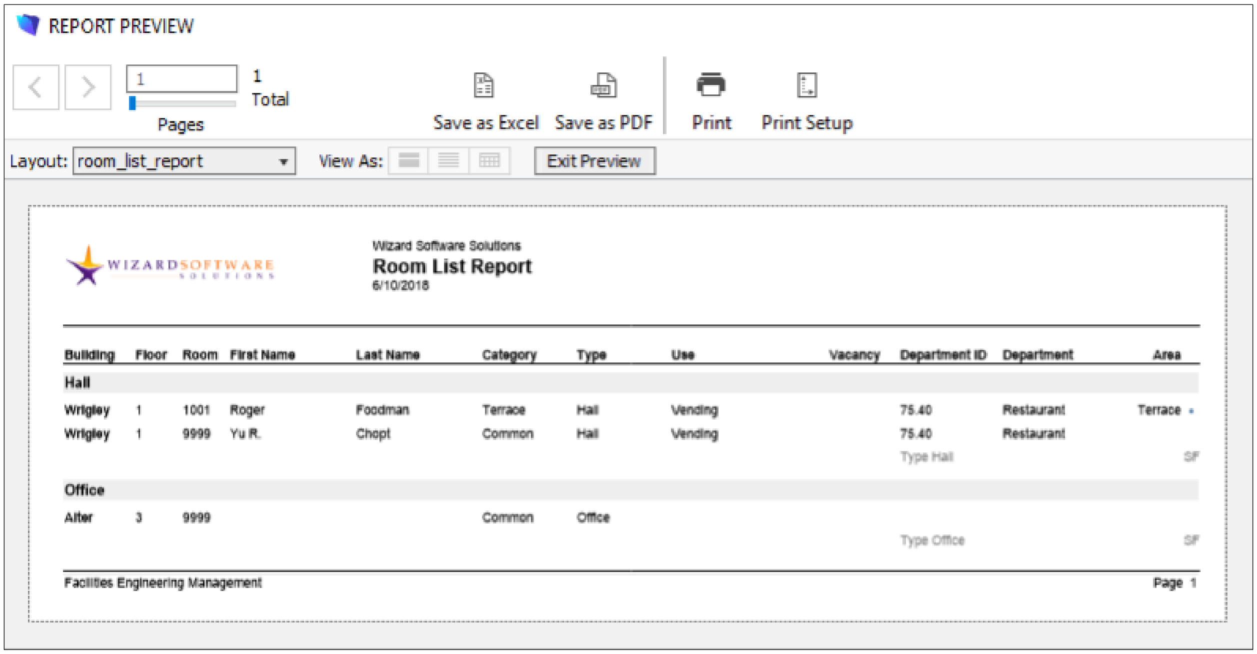


Figure 266 Room Report

Click the **ACTIONS MENU** button on the Actions bar on the Room List view. Click the **ROOMS REPORT** option from the value list. Performo displays the Edit Report Title dialog box. Accept the default title or enter a new title.

Click the **OK** button. Performo displays the Report Preview.

Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

Click the **EXIT PREVIEW** button to return to the Room List view.

▷Video Building Detail View

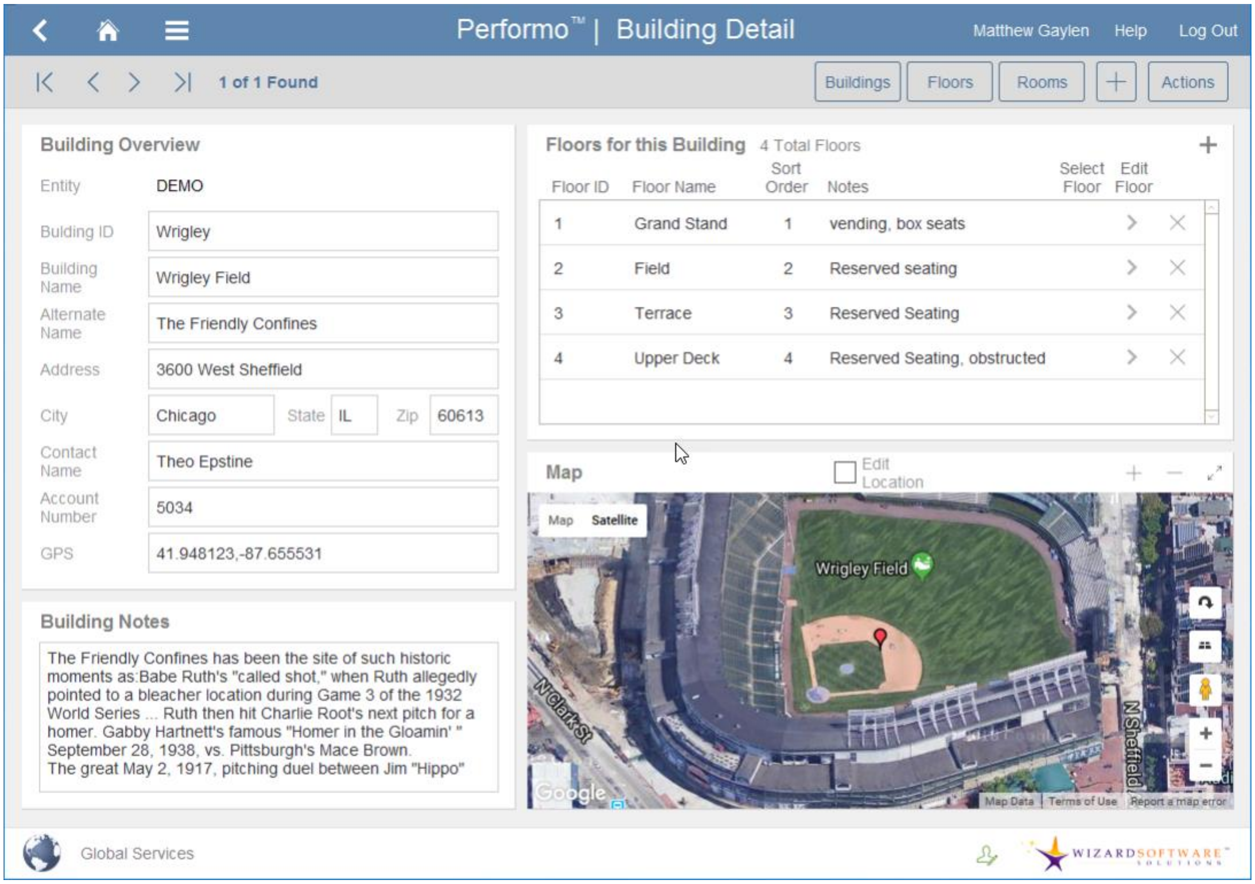


Figure 267 Building Detail View

The Building Detail view is divided into four sections; Building Overview, Building Notes, Floors for this Building, and Map.

The Building Overview displays fields for Entity, Building ID, Building Name, Alternate Name, Address, City, State, Zip, Contact Name, Account Number, GPS.

Click the **EDIT LOCATION** checkbox in the Map section. Click the location of the building on the map. Performo automatically adds the coordinates to the GPS field in the Building Overview section.

Data displayed on the Floors for this Building section includes, Floor ID, Floor Name, Sort Order, and Notes. Click the **ADD NEW RECORD** button in the upper right-hand corner of the Floors for this Building section. Performo adds a new record to the list. Data may be added directly to the list view. Click the **EDIT FLOOR** button. Performo displays the Floor Detail view. Floor detail is covered previously in this user reference guide.

Click the **DELETE** button at the end of the row. Performo initiates the delete floor procedure. Upon confirmation, the floor record is permanently deleted.

ACTIONS BUTTON – AUTO-POPULATE FLOORS

Click the **ACTIONS** button on the Actions bar on the Building Detail view. Click the **AUTO POPULATE FLOORS** option. Performo displays the Add Building Floors dialog box. The Add Building Floors dialog box is resizable. Use the resize handles on the corners of the dialog box to reduce or enlarge overall dimensions. A larger dialog box makes it easier to add a larger number of floors at once.

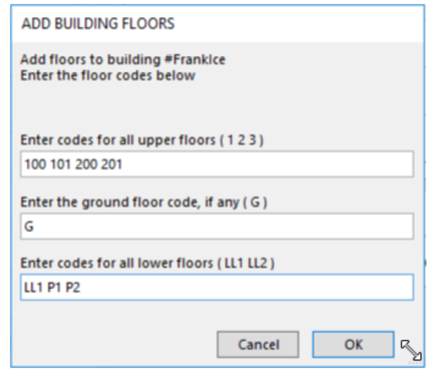
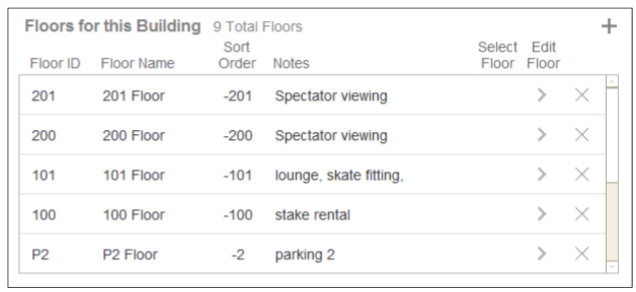


Figure 268 Add Building Floors

There are three fields on the Add Building Floors dialog box. Enter Codes (room numbers) for upper floors. Use a space between floors.


Floors for this Building 9 Total Floors

Floor ID	Floor Name	Sort Order	Notes	Select Floor	Edit Floor
201	201 Floor	-201	Spectator viewing	>	×
200	200 Floor	-200	Spectator viewing	>	×
101	101 Floor	-101	lounge, skate fitting,	>	×
100	100 Floor	-100	stake rental	>	×
P2	P2 Floor	-2	parking 2	>	×

Figure 269 Floors for this Buildings

Enter the Ground Floor Code. Some users will choose G… some will choose 100. Any code or number may be used.

Enter codes or numbers for the lower levels… Use a space between levels.

Click the **OK** button. Performo adds the floors to the list.

Please contact the Solution Admin if there is already a spreadsheet of floors. The Project Engineering team at Wizard Software might be able to import the table of floors all at once to get started.

Reports Module

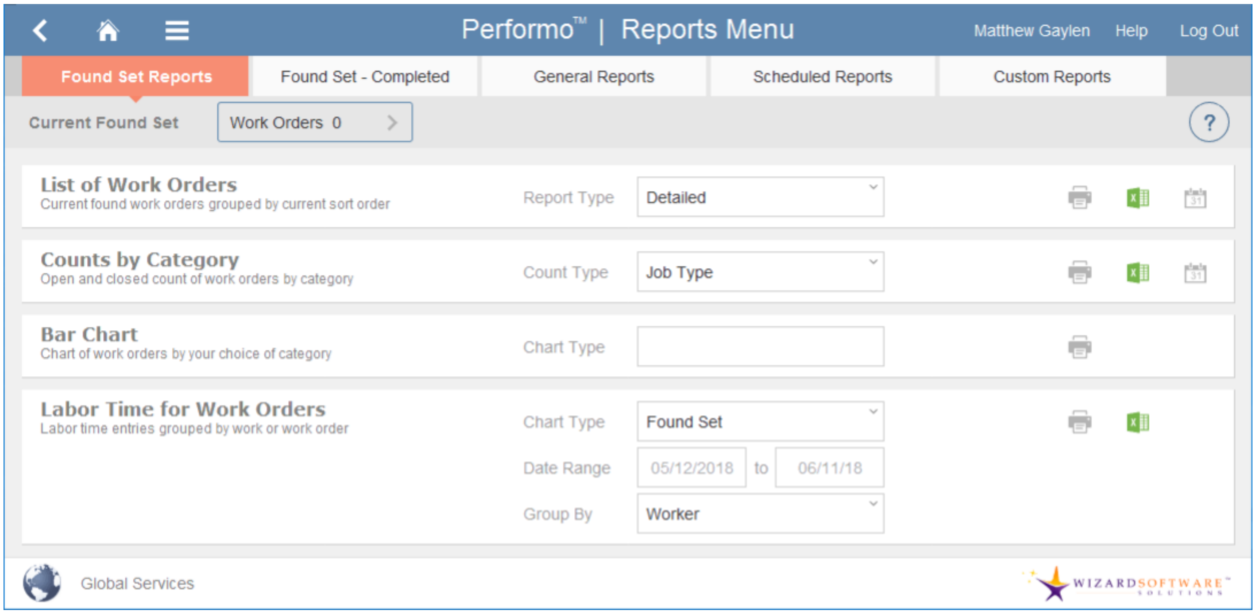


Figure 270 Reports Module

The Reports module is where the magic happens. The Reports module displays five sets of tabs. Tabs include Found Set Reports, Found Set – Completed, General Reports, Scheduled Reports, and Custom Reports.

Found Set Reports

Found set reports are divided into four types.

- List of Work Orders. Detailed or Summary. Print, Export to Excel, or Schedule.
- Counts by Category. Sort by Job Type, Location, Worker. Print, Export to Excel, or Schedule.
- Bar Chart. Sort by Job Type, Vendor or Assign To, Building, Requesting Department, requestor, Job Priority, Month, Job Status, or Entity. Print.
- Labor Time for Work Orders. Found Set or Date Range, Group by Worker or Work Order. Print or export to Excel.

LIST OF WORK ORDERS – SUMMARY

This report displays the current found set of work orders grouped by current sort order. To create a current sort order; start in the Work Orders module. Use the Global Search field or the Filters to create a found set. Click the column heading to sort the found set. Click the **NAVIGATION** menu. Click the **REPORTS** option. In the List of Work Orders section; choose whether the report is to be Summary or Detailed. Click **PRINT**, **EXCEL**, or **SCHEDULE** to execute the report.

Report options: Detailed or Summary.
Output options are Print to printer, PDF, Export to Microsoft Excel, Schedule.

Report Type Summary

Wizard Software Solutions
May 2018 - Sorted by Worker
6/11/2018

ENT	Order #	Date	Order By	Dept	Job Type	Building	Room	Assign To	Pri	Date Done
Aaron Shea										
DEMO	20493	05/02/18	Johnson, Doug	Engineering	HVAC	Center1	222	Aaron Shea	2	
DEMO	20500	05/03/18	Matthew Gaylen		Carpentry			Aaron Shea	2	
DEMO	20501	05/04/18	Matthew Gaylen	Facilities	HVAC	Wrigley	LL2	Aaron Shea	2	
DEMO	20510	05/09/18	Johnson, Doug	Engineering	HVAC	Center1	222	Aaron Shea	2	
DEMO	20514	05/16/18	Johnson, Doug	Engineering	HVAC	Center1	222	Aaron Shea	2	
DEMO	20516	05/17/18	Suburbs, Joe	Facilities	Electrical	Annex	lobby	Aaron Shea	2	
DEMO	20517	05/18/18	Suburbs, Joe	Facilities	Electrical	Annex	18552	Aaron Shea	2	05/30/18
DEMO	20518	05/18/18	Suburbs, Joe	Facilities	Electrical	Annex	18552	Aaron Shea	2	05/18/18
DEMO	20519	05/18/18	Suburbs, Joe	Facilities	Electrical	Annex	18552	Aaron Shea	2	05/18/18
DEMO	20521	05/23/18	Johnson, Doug	Engineering	HVAC	Center1	222	Aaron Shea	2	
DEMO	20529	05/29/18	Suburbs, Joe	Facilities	Painting	Annex	18552	Aaron Shea	3	07/29/18
DEMO	20534	05/30/18	Johnson, Doug	Engineering	HVAC	Center1	222	Aaron Shea	2	
Subtotal		**12 Work Orders**		**8 Open**	**4 Completed**	**0 DNC**				
Ami Patel										
DEMO	20508	05/08/18	Johnson, Doug	Engineering	Grounds	Raven		Ami Patel	2	
DEMO	20520	05/22/18	Johnson, Doug	Engineering	Grounds	Raven		Ami Patel	2	
Subtotal		**2 Work Orders**		**2 Open**	**0 Completed**	**0 DNC**				
Andy Corey										
DEMO	20490	05/01/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	06/05/18
DEMO	20491	05/01/18	Allen, Charlie	Executive	Cleaning	Center1	1320	Andy Corey	2	06/05/18
DEMO	20492	05/02/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	
DEMO	20495	05/03/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	06/05/18
DEMO	20498	05/04/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	06/05/18
DEMO	20499	05/04/18	Allen, Charlie	Executive	Plumbing	Center1	1320	Andy Corey	2	06/05/18
DEMO	20502	05/05/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	06/05/18
DEMO	20503	05/06/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	06/05/18
DEMO	20504	05/07/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	
DEMO	20506	05/08/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	06/05/18
DEMO	20509	05/09/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	
DEMO	20511	05/10/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	06/05/18
DEMO	20512	05/11/18	Brantley, Judy	Admin	HVAC	Center1	Chiller/Boiler	Andy Corey	2	06/05/18

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Figure 271 List of Work Orders - Found Set - Summary

LIST OF WORK ORDERS – DETAIL BY WORKER

same as previous – detail view.

Report options: Detailed or Summary.

Output options are Print to printer, PDF, Export to Microsoft Excel, Schedule.

Wizard Software Solutions

May 2018 - Detail By Worker

6/11/2018

ENT	Order #	Date	Job Type	Pri	Order By	Dept	Building	Room	Description	Date Done
Aaron Shea										
DEMO	20493	05/02/18	HVAC	2	Johnson, Doug	Engineering	Center1	222	Fans Weekly PM	
DEMO	20500	05/03/18	Carpentry	2	Matthew Gaylen					
DEMO	20501	05/04/18	HVAC	2	Matthew Gaylen	Facilities	Wrigley	LL2	Quarterly Maintenance	
DEMO	20510	05/09/18	HVAC	2	Johnson, Doug	Engineering	Center1	222	Fans Weekly PM	
DEMO	20514	05/16/18	HVAC	2	Johnson, Doug	Engineering	Center1	222	Fans Weekly PM	
DEMO	20516	05/17/18	Electrical	2	Suburbs, Joe	Facilities	Annex	lobby		
DEMO	20517	05/18/18	Electrical	2	Suburbs, Joe	Facilities	Annex	18552		05/30/18
DEMO	20518	05/18/18	Electrical	2	Suburbs, Joe	Facilities	Annex	18552		05/18/18
DEMO	20519	05/18/18	Electrical	2	Suburbs, Joe	Facilities	Annex	18552		05/18/18
DEMO	20521	05/23/18	HVAC	2	Johnson, Doug	Engineering	Center1	222	Fans Weekly PM	
DEMO	20529	05/29/18	Painting	3	Suburbs, Joe	Facilities	Annex	18552	Paint Dorm Rooms in Chipeta Hall	07/29/18
DEMO	20534	05/30/18	HVAC	2	Johnson, Doug	Engineering	Center1	222	Fans Weekly PM	
Subtotal			**12 Work Orders**		**8 Open**	**4 Completed**	**0 DNC**			
Ami Patel										
DEMO	20508	05/08/18	Grounds	2	Johnson, Doug	Engineering	Raven		Weekly Summer Grounds PM	
DEMO	20520	05/22/18	Grounds	2	Johnson, Doug	Engineering	Raven		Weekly Summer Grounds PM	
Subtotal			**2 Work Orders**		**2 Open**	**0 Completed**	**0 DNC**			
Andy Corey										
DEMO	20490	05/01/18	HVAC	2	Brantley, Judy	Admin	Center1	Chiller/Boiler	Chiller Annual PM	06/05/18
DEMO	20491	05/01/18	Cleaning	2	Allen, Charlie	Executive	Center1	1320	Water on floor in men's room and Pipe near sink may be leaking.	06/05/18
DEMO	20492	05/02/18	HVAC	2	Brantley, Judy	Admin	Center1	Chiller/Boiler	Chiller Annual PM	
DEMO	20495	05/03/18	HVAC	2	Brantley, Judy	Admin	Center1	Chiller/Boiler	Chiller Annual PM	06/05/18
DEMO	20498	05/04/18	HVAC	2	Brantley, Judy	Admin	Center1	Chiller/Boiler	Chiller Annual PM	06/05/18

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Figure 272 List of Work Orders - Detail by Worker - Found Set.

COUNTS BY CATEGORY – AKA WORK ORDER SUMMARY REPORT

The Counts by category reports display the number of open and closed work orders grouped by category. Categories are Job Type, Worker, and Location.

Report options: group by Job Type, Worker, or Location.
Output options: Print to printer, PDF, Export to Microsoft Excel, Schedule.

Job Type

Wizard Software Solutions
Work Order Summary Report - By Job Type
6/11/2018

Job Type	Earliest	Latest	Total # Orders	Open	Complete	DNC
	05/25/18	05/30/18	4	4	0	0
Cabling / Datacom	05/30/18	05/30/18	1	0	0	0
Calibration	05/30/18	05/30/18	1	1	0	0
Carpentry	05/03/18	05/03/18	1	1	0	0
Cleaning	05/01/18	05/01/18	1	0	1	0
Electrical	05/07/18	05/31/18	8	3	5	0
Grounds	05/03/18	05/22/18	3	3	0	0
HVAC	05/01/18	05/31/18	20	12	8	0
Inspections	05/08/18	05/27/18	2	2	0	0
Painting	05/29/18	05/29/18	1	0	1	0
Plumbing	05/02/18	05/04/18	2	1	1	0
Report Totals	**05/01/18**	**05/31/18**	**44**	**27**	**16**	**0**

Wizard Software Solutions
Work Order Summary Report - By Worker
6/11/2018

WORKER	Earliest	Latest	Total # Orders	Open	Complete	DNC
Aaron Shea	05/02/18	05/30/18	12	8	4	0
Ami Patel	05/08/18	05/22/18	2	2	0	0
Andy Corey	05/01/18	05/11/18	13	3	10	0
Andy Holub	05/02/18	05/29/18	2	2	0	0
Bill Hammer	05/07/18	05/31/18	11	9	1	0
Blaine Frost	05/03/18	05/27/18	2	2	0	0
Masters HVAC Maint	05/17/18	05/17/18	1	1	0	0
#UncleMatt	05/31/18	05/31/18	1	0	1	0
Report Totals	**05/01/18**	**05/31/18**	**44**	**27**	**16**	**0**

Figure 273 Work Order Summary Reports - aka Counts by Category

WORK ORDER SUMMARY BAR CHARTS

Bar charts display the same data as tabular reports. However, in certain situations, the graphical nature of the bar chart is helpful for visual learners.

The found set of work orders may be displayed in the form of a bar chart. There are 10 bar chart types.

Report options: Chart Type = by Job Type, Vendor/Assign to, Division, Requesting Department, Requestor, Job Priority, Month, Job Status, or Entity.
Output options: Print to printer or PDF.

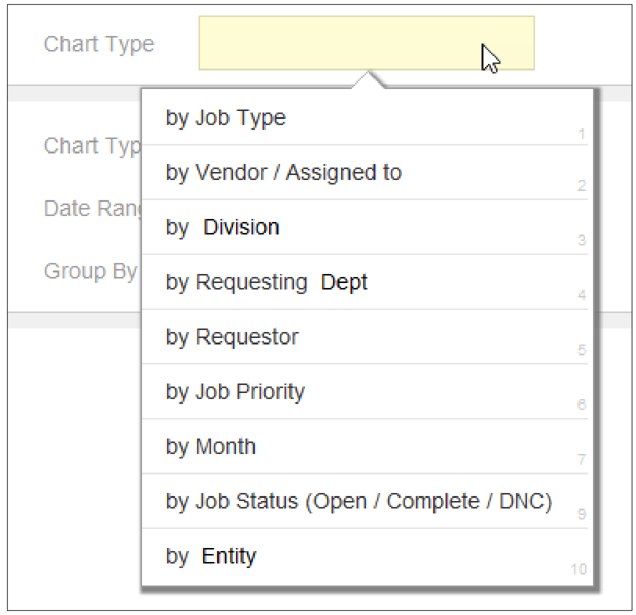

Figure 274 Bar Chart Types

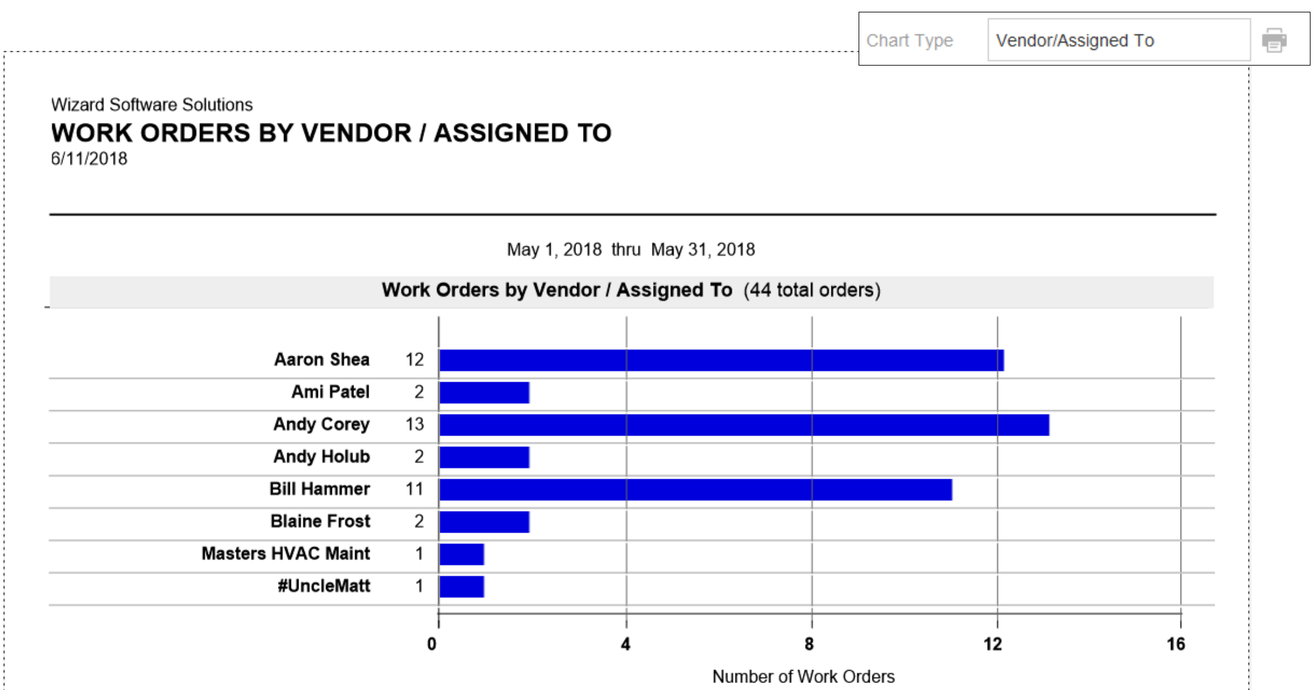

Figure 275 Work Orders By Vendor / Assign To

LABOR TIME FOR WORK ORDERS GROUPED BY WORKER

The Labor Time for Work Orders report displays time and materials data for each work order in the found set.

Report Options: Chart (report) type value list options are Date Range or Found Set. If Date Range is chosen, then values must be entered in the Date Range *From* and *To* fields below the Chart Type value list. The report can be grouped by Worker or Work Order number. Output Options: Printer, PDF, and export to Microsoft Excel.

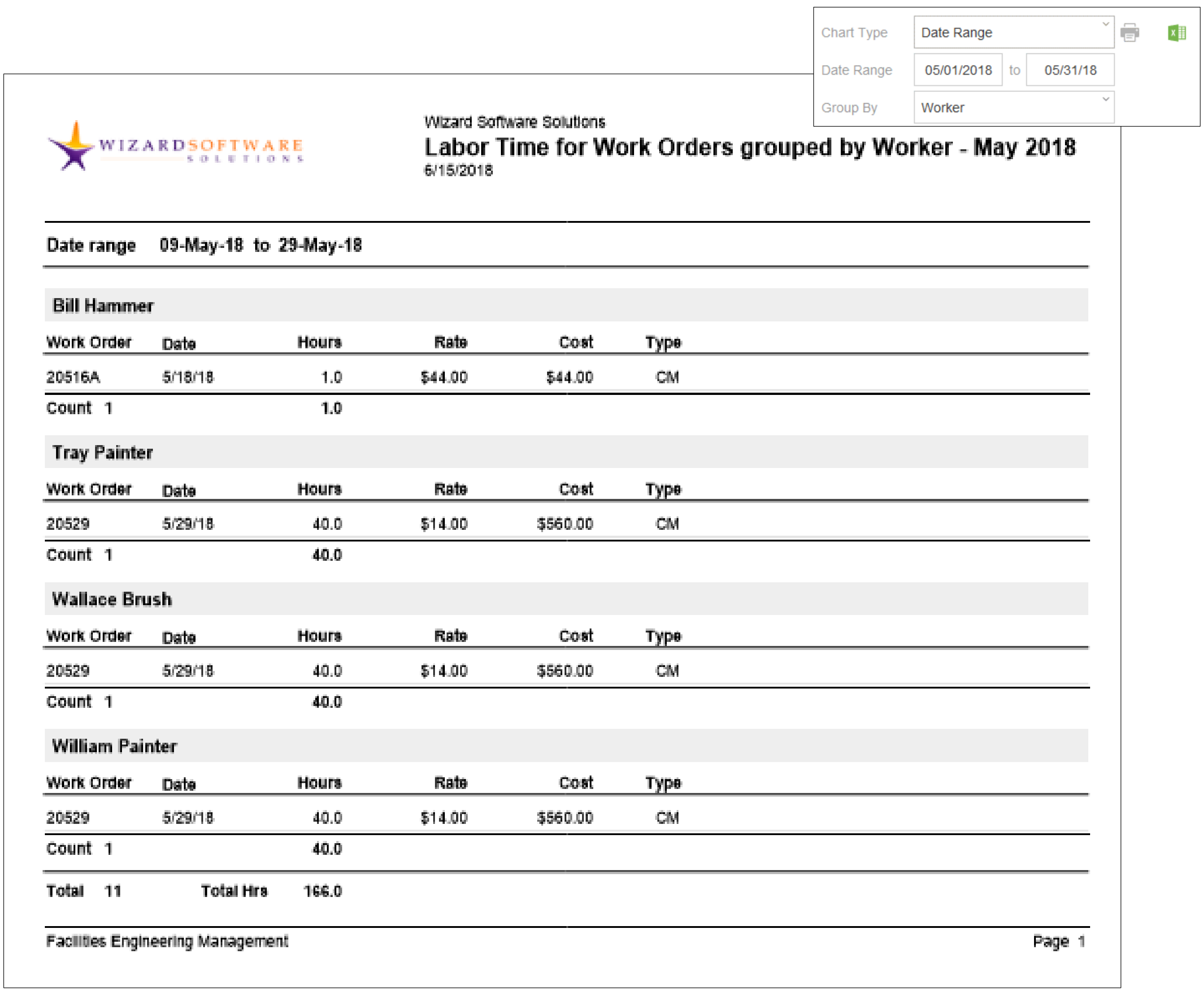

Chart Type: Date Range
Date Range: 05/01/2018 to 05/31/18
Group By: Worker

Wizard Software Solutions
Labor Time for Work Orders grouped by Worker - May 2018
6/15/2018

Date range 09-May-18 to 29-May-18

Bill Hammer

Work Order	Date	Hours	Rate	Cost	Type
20516A	5/18/18	1.0	$44.00	$44.00	CM
Count 1		1.0			

Tray Painter

Work Order	Date	Hours	Rate	Cost	Type
20529	5/29/18	40.0	$14.00	$560.00	CM
Count 1		40.0			

Wallace Brush

Work Order	Date	Hours	Rate	Cost	Type
20529	5/29/18	40.0	$14.00	$560.00	CM
Count 1		40.0			

William Painter

Work Order	Date	Hours	Rate	Cost	Type
20529	5/29/18	40.0	$14.00	$560.00	CM
Count 1		40.0			

Total 11 Total Hrs 166.0

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Figure 276 Labor Time for Work Orders Grouped by Worker – May 2018

LABOR TIME FOR WORK ORDERS – BY WORK ORDER

The Labor Time for Work Orders report displays time and materials data for each work order in the found set.

Report Options: Chart (report) type value list options are Date Range or Found Set. If Date Range is chosen, then values must be entered in the Date Range *From* and *To* fields below the Chart Type value list. The report can be grouped by Worker or Work Order number. Output Options: Printer, PDF, and export to Microsoft Excel.

Chart Type	Date Range		
Date Range	05/01/2018	to	05/31/18
Group By	Work Order		

Wizard Software Solutions

Labor Time for Work Orders grouped by Work Order - May 2018

6/15/2018

Date range 09-May-18 to 29-May-18

	Worker	Date	Hours	Rate	Cost	Type
Work Order 20516						
	Aaron Shea	5/17/18	1.0	$45.00	$45.00	CM
			1.0			
Work Order 20516A						
	Bill Hammer	5/18/18	1.0	$44.00	$44.00	CM
			1.0			
Work Order 20517						
	Aaron Shea	5/18/18	1.0	$45.00	$45.00	CM
			1.0			
Work Order 20518						
	Aaron Shea	5/18/18		$45.00	$0.00	CM
Work Order 20519						
	Aaron Shea	5/18/18	1.0	$45.00	$45.00	CM
			1.0			
Work Order 20529						
	Aaron Shea	5/29/18	40.0	$45.00	$1,800.00	CM
	Tray Painter	5/29/18	40.0	$14.00	$560.00	CM
	Wallace Brush	5/29/18	40.0	$14.00	$560.00	CM
	William Painter	5/29/18	40.0	$14.00	$560.00	CM
			160.0			
Work Order						
	Aaron Shea	5/9/18	1.0	$45.00	$45.00	
	Aaron Shea	5/9/18	1.0	$45.00	$45.00	
			2.0			
Total Count 11		Total Hrs	166.0			

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Figure 277 Labor Time for Work Orders - by Work Order

Found Set – Completed Work Orders Only

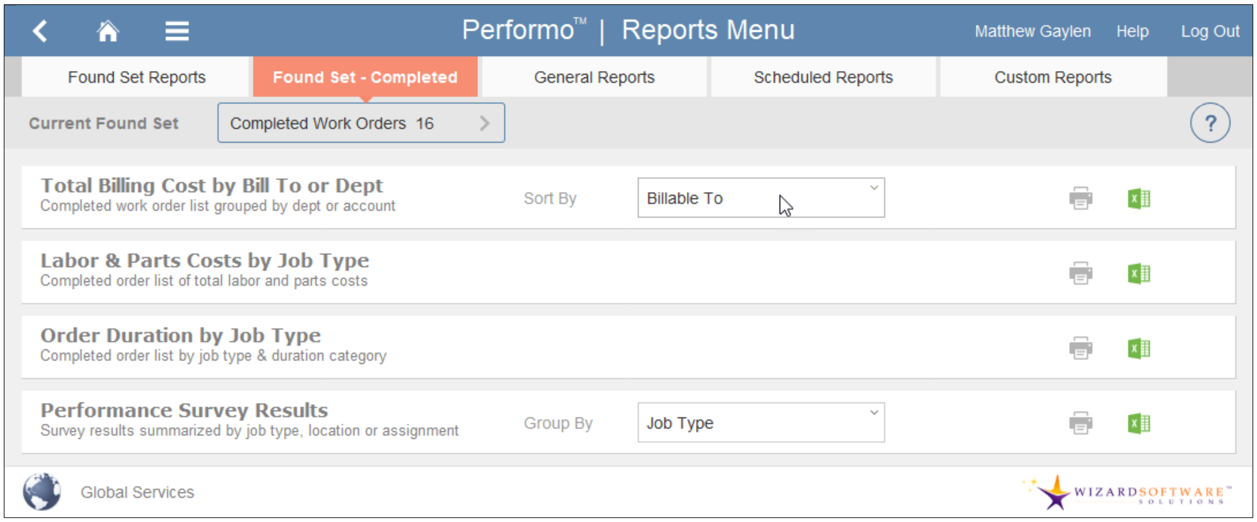

Figure 278 Reports using data from the completed orders in the found set

Whereas the previous section displays charts and reports aggregates data from the found set, including open and completed work orders; the reports on this tab compile data from the completed work orders in the found set.

Note, if the found set is Open work orders, then these reports will not display any data. The Current Found Set field at the top of the list of reports displays the number of Completed Work Orders in the found set.

Click the **CURRENT FOUND SET** field. Performo navigates to the Work Orders module and displays the Found Set of records. Use the **GLOBAL SEARCH** field or the **FILTERS** button to create a found set of work orders to report about. Click the **BACK** button to return to the Reports module.

TOTAL BILLING COST BY BILL TO OR DEPARTMENT

The Total Billing Cost by Bill To or Department reports aggregate data from the completed work orders in the found set. The reports display total cost information complied from time and materials entries on work orders.

Report Options: Sort by Billable To or Department (selected on the work order)
Output Options: Print to printer or PDF, export data to Microsoft Excel.

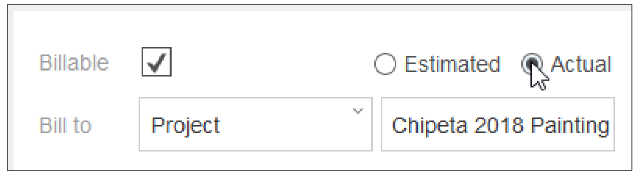

Figure 280 Work Order Detail > Billing Options

Sort By Billable To

Wizard Software Solutions
Total Billing Cost by Billable To... May 2018
6/15/2018

Order #	Date	Job Type	Order By	Division	Pri	Done	$ Amt
Acct Code:							
20490	05/01/18	HVAC	Brantley, Judy	Center1	2	06/05/18	482.45
20495	05/03/18	HVAC	Brantley, Judy	Center1	2	06/05/18	482.45
20498	05/04/18	HVAC	Brantley, Judy	Center1	2	06/05/18	482.45
20502	05/05/18	HVAC	Brantley, Judy	Center1	2	06/05/18	482.45
20503	05/06/18	HVAC	Brantley, Judy	Center1	2	06/05/18	482.45
20506	05/08/18	HVAC	Brantley, Judy	Center1	2	06/05/18	482.45
20511	05/10/18	HVAC	Brantley, Judy	Center1	2	06/05/18	482.45
20512	05/11/18	HVAC	Brantley, Judy	Center1	2	06/05/18	482.45
						Total Billable Amt	$ 3,859.60
Project:							
20491	05/01/18	Cleaning	Allen, Charlie	Center1	2	06/05/18	0.00
20499	05/04/18	Plumbing	Allen, Charlie	Center1	2	06/05/18	0.00
20516A	05/17/18	Electrical	Suburbs, Joe	Annex	2	05/18/18	81.84
20517	05/18/18	Electrical	Suburbs, Joe	Annex	2	05/30/18	95.27
20518	05/18/18	Electrical	Suburbs, Joe	Annex	2	05/18/18	24.68
20519	05/18/18	Electrical	Suburbs, Joe	Annex	2	05/18/18	70.58
20529	05/29/18	Painting	Suburbs, Joe	Annex	3	07/29/18	9,793.28
20551	05/31/18	Electrical	Suburbs, Joe	Annex	2	06/05/18	76.50
						Total Billable Amt	$ 10,142.15

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Figure 279 Total Billing Cost by Bill to or Department

LABOR & PARTS COSTS BY JOB TYPE

The Labor & Parts Costs by Job Type report compiles data from the completed work orders in the found set. The report displays totals, subtotals and averages for time and materials.

Report Options. None.
Output Options; Printer, PDF, export to Microsoft Excel.

Labor & Parts Costs by Job Type
Completed order list of total labor and parts costs

Wizard Software Solutions
Labor & Parts Costs By Job Type
6/15/2018

Order #	Job Type	Assigned to	Order Date	Hours	Labor	Materials	Total Order
Cleaning							
20491	Cleaning	Andy Corey	05/01/18				
Subtotals		1 Work Orders					
Averages							
Electrical							
20516A	Electrical	Bill Hammer	05/17/18	1.00	$ 44.00	$ 24.20	$ 68.20
20518	Electrical	Aaron Shea	05/18/18		$ 0.00	$ 24.20	$ 24.20
20519	Electrical	Aaron Shea	05/18/18	1.00	$ 45.00	$ 24.20	$ 69.20
20517	Electrical	Aaron Shea	05/18/18	1.00	$ 45.00	$ 48.40	$ 93.40
20551	Electrical	#UncleMatt	05/31/18	1.00	$ 75.00		$ 75.00
Subtotals		5 Work Orders		4.00	$ 209.00	$ 121.00	$ 330.00
Averages				*1.00*	*$ 41.80*	*$ 30.25*	*$ 66.00*
Painting							
20529	Painting	Aaron Shea	05/29/18	?	$ 3,480.00	$ 6,121.25	$ 9,601.25
Subtotals		1 Work Orders		?	$ 3,480.00	$ 6,121.25	$ 9,601.25
Averages				*?*	*$ 3,480.00*	*$ 6,121.25*	*$ 9,601.25*
Plumbing							
20499	Plumbing	Andy Corey	05/04/18				
Subtotals		1 Work Orders					
Averages							
Report Totals		16 Work Orders		?	$ 5,929.00	$ 7,786.17	$ 13,715.17
Averages				*16.31*	*$ 423.50*	*$ 598.94*	*$ 979.66*

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Figure 281 Labor & Parts Costs by Job Type

ORDER DURATION BY JOB TYPE

The Order Duration by Job Type report displays the starting date and completion date of each completed work order in the found set. Each job type category is sub-divided into three sections; 0-24 hours, 24-48 hours, and 48 hours+. Order duration is automatically calculated and displayed in days.

Report Options: None.
Output Options: Printer, PDF, or export to Microsoft Excel.

Order Duration by Job Type
Completed order list by job type & duration category

Wizard Software Solutions
Order Duration by Job Type - 2018 YTD
6/15/2018

Order #	Job Type	Assigned to	Start Date	Time	Complete Date	Time	Duration (days)
Cabling / Datacom							
Duration: 0 - 24 hrs							
20170	Cabling / Datacom	Bill Hammer	01/05/18	08:38	01/07/18	08:38	0.0
20211	Cabling / Datacom	Bill Hammer	01/19/18	08:38	01/20/18	08:38	0.0
20215	Cabling / Datacom	Bill Hammer	01/21/18	08:38	01/23/18	08:38	1.0
20244	Cabling / Datacom	Bill Hammer	02/01/18	08:38	02/02/18	08:38	1.0
20402	Cabling / Datacom	Bill Hammer	03/30/18	08:38	04/01/18	08:38	0.0
20405	Cabling / Datacom	Bill Hammer	03/31/18	08:38	04/03/18	08:38	1.0
20479	Cabling / Datacom	Bill Hammer	04/26/18	08:38	04/28/18	08:38	1.0
7 Work Order(s)						Avg =	0.6
Duration: 24 - 48 hrs							
20428	Cabling / Datacom	Bill Hammer	04/09/18	08:38	04/11/18	08:38	2.0
20437	Cabling / Datacom	Bill Hammer	04/12/18	08:38	04/16/18	08:38	2.0
2 Work Order(s)						Avg =	2.0
Duration: 48 hrs +							
20173	Cabling / Datacom	Bill Hammer	01/08/18	08:38	01/14/18	08:38	4.0
20219	Cabling / Datacom	Bill Hammer	01/23/18	08:38	01/29/18	08:38	4.0
20333	Cabling / Datacom	Bill Hammer	03/05/18	08:38	03/09/18	08:38	4.0
20341	Cabling / Datacom	Bill Hammer	03/08/18	08:38	03/13/18	08:38	3.0
20363	Cabling / Datacom	Bill Hammer	03/16/18	08:38	03/21/18	08:38	3.0
20375	Cabling / Datacom	Bill Hammer	03/20/18	08:38	03/27/18	08:38	5.0
20395	Cabling / Datacom	Bill Hammer	03/27/18	08:38	04/09/18	08:38	9.0
20416	Cabling / Datacom	Bill Hammer	04/04/18	08:38	04/26/18	08:38	16.0
8 Work Order(s)						Avg =	6.0
Total 17 Work Order(s)						Avg =	3.3

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Figure 282 Order Duration by Job Type

PERFORMANCE SURVEY RESULTS

The Performance Survey Results displays survey results for completed work orders in the found set.

Report Options: group by Job Type, Location or Worker.
Output Options: Printer, PDF, or export to Microsoft Excel.

Group By: Location

Wizard Software Solutions
Performance Survey Results By Location
6/15/2018

Survey Results 08/26/15 to 04/18/18	Survey Count	Acceptable? No	Yes	%Yes	Avg	Rating Min	Max
Annex	1	0	1	100%	5.0	5	5
Center1	6	1	2	?	3.3	1	5
Center2	2	0	2	100%	5.0	5	5
Commerce	1	0	1	100%	5.0	5	5
Pavilion	3	0	2	100%	3.5	2	5

Group By: Job Type

Wizard Software Solutions
Performance Survey Results By Job Type
6/15/2018

Survey Results 08/26/15 to 04/18/18	Survey Count	Acceptable? No	Yes	%Yes	Avg	Rating Min	Max
Cabling / Datacom	1	0	1	100%	5.0	5	5
Calibration	1						
Carpentry	3	0	3	100%	4.0	2	5
Electrical	3	0	2	100%	5.0	5	5
HVAC	1	0	1	100%	4.0	4	4
IT	1						
Mechanical	1						
Plumbing	1	1	0	0%	1.0	1	1
Too Hot / Too Cold	1	0	1	100%	5.0	5	5

Figure 283 Performance Survey Results

General Reports

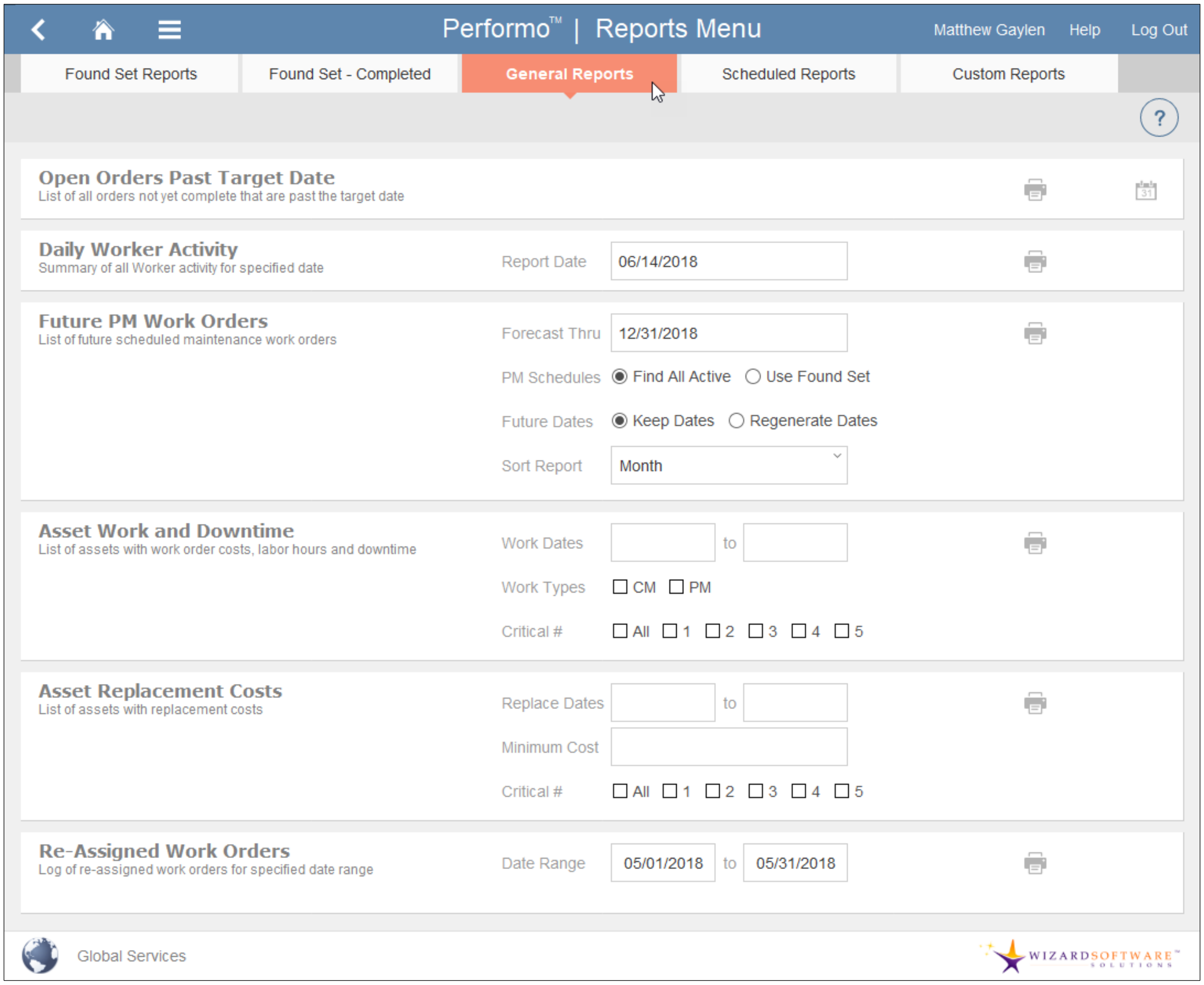

Figure 284 General Reports

General reports are not based on the found set. Instead, most of the general reports are based on a date range or some other combination of user-definable criteria.

GENERAL REPORTS (AKA THE GENERAL'S REPORTS):

- Open Orders Past Target Date
- Daily Worker Activity
- Future PM Work Orders
- Asset Work and Downtime
- Asset Replacement Costs
- Re-Assigned Work Orders.

OPEN ORDERS PAST TARGET DATE

The Open Orders Past Target date automatically, under-the-hood, behind-the-scenes creates a found set of all open work orders. Then, the target dates are examined, and the days past column is calculated and displayed as the right-most column on the report. Data displayed on the report includes Order Number, Date, Job Type, Priority, Order By, Building, room, Assign To, Start, Target, and the calculated Days Past column. The report will be most useful if target dates are entered consistently and reliably on the Work Order Detail view.

Report Options: Automatically calculated.
Output Options: Print to printer or PDF, Schedule.

Open Orders Past Target Date
List of all orders not yet complete that are past the target date
Generate and print this report

Wizard Software Solutions
Work Order Report - Open Orders Past Target Completion Date
6/11/2018

Order #	Date	Job Type	Pri	Order By	Building	Room	Assign To	Start	Target	Days Past
Denied	02/27/18	Cleaning	3	Bolger, Katie	Center1	1204		02/27/18	03/02/18	101
Subtotal		**1 Work Orders**		**0 Open**	**0 Completed**	**0 DNC**				
Aaron Shea										
20065A	02/23/18	Cabling / Datacom	1	Carson, Mark	Center2	330	Aaron Shea	02/23/18	04/18/18	54
20257	02/07/18	Security	3	Sorich, Mark	Commerce	231	Aaron Shea	02/07/18	02/09/18	122
20413	04/03/18	Vehicle		Suburbs, Joe	Pavilion	Parking Garage	Aaron Shea	04/03/18	04/03/18	69
20500	05/03/18	Carpentry	2	Matthew Gaylen			Aaron Shea	05/03/18	05/06/18	36
20501	05/04/18	HVAC	2	Matthew Gaylen	Wrigley	LL2	Aaron Shea	05/04/18	05/07/18	35
20516	05/17/18	Electrical	2	Suburbs, Joe	Annex	lobby	Aaron Shea	05/17/18	05/18/18	24
Subtotal		**6 Work Orders**		**6 Open**	**0 Completed**	**0 DNC**				
American Electric Supply Co.										
REQ	03/30/18	Too Hot / Too Cold	1	Carson, Mark	Center2	202	American Electric	03/30/18	03/30/18	73
Subtotal		**1 Work Orders**		**1 Open**	**0 Completed**	**0 DNC**				
Andy Corey										
6	03/30/18	Too Hot / Too Cold	1	Carson, Mark	Center2		Andy Corey	03/30/18	03/30/18	73
20052B	10/26/17	Cleaning	1	Bancel, Doug	Pavilion	Parking Garage	Andy Corey	10/26/17	10/26/17	228
20236	01/30/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	01/30/18	03/01/18	102
20238	01/31/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	01/31/18	03/02/18	101
20243	02/01/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	02/01/18	03/03/18	100
20247	02/02/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	02/02/18	03/04/18	99
20249	02/03/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	02/03/18	03/05/18	98
20251	02/04/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	02/04/18	03/06/18	97
20253	02/05/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	02/05/18	03/07/18	96
20255	02/06/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	02/06/18	03/08/18	95
20443	04/15/18	HVAC	2	Brantley, Judy	Center1	Chiller/Boiler	Andy Corey	04/15/18	05/15/18	27

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Figure 285 Open Orders Past Target Date

DAILY WORKER ACTIVITY

The Daily Worker Activity report targets data from one day but also displays data recorded on current open orders. The report automatically generates the found set of data based on the date chosen prior to running the report. The report shows data for PMs, CMs, Total Open, On Hold, and Did Not Complete. This report will be most useful if time is entered reliably and consistently.

Report Options: Automatically calculated.
Output Options: Print to printer or PDF.

Daily Worker Activity
Summary of all Worker activity for specified date
Report Date 06/05/2018

Wizard Software Solutions
Daily Worker Activity - 6/16/2018
6/16/2018

	Current Open Order Totals *					Saturday, June 16, 2018						
						PM Orders		CM Orders		Hours Entered		
Worker	PM	CM	Total Open	On Hold	DNC	New	Done	New	Done	PM	CM	Total
Aaron Shea	12	5	17	0	0	0	0	1	1	8.0	0.0	8.0
American Supply Co.	0	0	0	0	0	0	0	1	1	8.0	0.0	8.0
Andy H. Vack	0	0	0	0	0	0	0	1	1	8.0	0.0	8.0
Andy Holub	25	4	29	1	0	0	0	1	1	8.0	0.0	8.0
Bill Hammer	58	24	82	2	3	0	0	1	1	8.0	0.0	8.0
Joe Suburbs	7	0	7	0	0	0	0	1	1	8.0	0.0	8.0
#UncleMatt	0	0	0	0	0	0	0	1	1	8.0	0.0	8.0
Report Totals	**102**	**33**	**135**	**3**	**3**	0	0	**7**	**7**	**56.0**	0.0	**56.0**

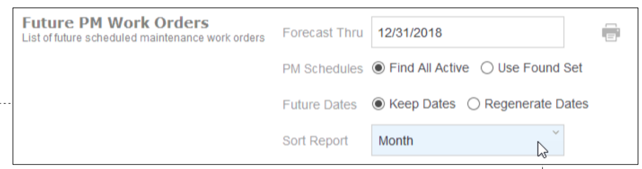
Figure 286 Daily Worker Activity

FUTURE PM WORK ORDERS

The report displays one row for each PM work order forecast to be created. The data is displayed by Location, Job Type, Assigned To, Week, or Month. Data includes PM# work order creation Date, Assets, Job Type, Assign To, Building, Room, Repeat Interval and Hours projected.

Report Options: 1) Choose a Forecast Through date. 2) Choose the type of PM Schedules to forecast using Radio buttons for either **FIND ALL ACTIVE** or **USE FOUND SET**; 3) Choose how to calculate Future Dates using radio buttons for **KEEP DATES** or **REGENERATE DATES**; 4) Choose how to sort and display the report by using the value list. Choices include; Location, Job Type, Assigned To, Week, Month.

Output Options: Send to Printer or PDF.



Wizard Software Solutions
PM Forecast Report
6/11/2018

PM #	Date	Description	Assets	Job Type	Assign To	Building	Room	Repeat	Hours
Week of Jun 1, 2018									
PM1342	06/01/18	Semi-annual boiler PM	(none)	Plumbing	Andy Holub	Center1	Boiler Room	Every month	
PM1350	06/01/18	Check to make sure the	(none)	Cabling / Datacom	Bill Hammer	Center1	2380	Every 3 months	
Subtotal		**40 Work Orders**							
Week of Jun 4, 2018									
PM1012	06/04/18	Quarterly air handler PM	(none)	Electrical	Bill Hammer	Center1	Mechanical	Every 3 months	
PM1250	06/04/18	Quarterly cooling tower	(none)	Inspections	Bill Hammer	Center1	Roof Top	Every 3 months	3.00
PM1315	06/04/18	Check breaker box	(none)	Electrical	Bill Hammer	Center1	Lower Level	Every month	4.00
PM1398	06/05/18	Weekly Summer Grounds PM	(none)	Grounds		Raven		Every 2 weeks	3.00
PM1397	06/06/18	Fans Weekly PM	(5) AHU.307 - Fan ...	HVAC	Aaron Shea	Center1	222	Every week	3.00
PM1311	06/08/18	Monthly PM Emergency Power	(none)	Inspections	Bill Hammer	Center2	1st Fl Main	Every month	
Subtotal		**40 Work Orders**							
Week of Jun 13, 2018									
PM1397	06/13/18	Fans Weekly PM	(5) AHU.307 - Fan ...	HVAC	Aaron Shea	Center1	222	Every week	3.00
PM1236	06/15/18	Semi-annual domestic chilling	(none)	HVAC	Andy Holub	Pavilion	Maintenance	Every day	3.00
PM1240	06/15/18	Semi-annual condenser PM	(none)	Electrical	Bill Hammer	Pavilion	Grd Level-	Every 6 months	1.00
PM1264	06/15/18	Semi-annual PM for Chiller	(none)	HVAC	Aaron Shea	Center1	Chiller/Boiler	Every 6 months	
PM1341	06/15/18	Semi-annual boiler PM	(none)	Plumbing	Andy Holub	Center1	Boiler Room	Every month	
Subtotal		**40 Work Orders**							
Week of Jun 17, 2018									
PM1377	06/17/18	Monthly PM for Nate Asste 001	(none)	Electrical	Masters HVAC	Center1	123	Every month	2.00
PM1011	06/18/18	Semi-annual cooling tower PM	(none)	HVAC	Blaine Frost	Center1	Roof - West Side	Every 6 months	3.00
PM1226	06/18/18	Quarterly PM	(none)	HVAC	Andy Corey	Center1	Chiller/Boiler	Every 3 months	4.00

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Figure 287 Future PM Work Orders

ASSET WORK AND DOWNTIME

The Asset Work and Downtime report displays the number of work orders, the total downtime (displayed as the calculation of the amount of time required to complete work orders), and the total cost calculated based on time and materials entered on work orders.

Report Options: 1) Enter Work Dates – From and To. 2) Choose Work Types using checkboxes for CM and PM. One Checkbox must be checked… both checkboxes may be checked. 3) Choose the Critical # to report about using checkboxes. Any or all of the checkboxes may be checked.

Output Options: Send to Printer or PDF.

Work Dates 01/01/2018 to 06/16/2018

Work Types ☐ CM ☑ PM

Critical # ☑ All ☑ 1 ☑ 2 ☑ 3 ☑ 4 ☑ 5

WIZARDSOFTWARE SOLUTIONS

Wizard Software Solutions

Asset Work & Downtime - 2018 YTD

6/16/2018

Asset ID	Name	System	Manufacturer	Division	Suite	Crit#	Work Orders	Total Cost	Total Downtime
AAA.101	Chiller AA1 Demo	Climate	Carrier	Center1	Chiller/Boiler	1	32	$5,439	1.5
AAA.103	Chiller AB1 Demo	Climate	Carrier	Center2	Chiller/Boiler	1	41	$9,231	1.0
AAH.222	Air Handler Unit	Climate	Carrier	Bus Build	101	2	4	$821	
ACU.105	Chiller Demo	Climate	Carrier	Center1	Chiller/Boiler Room	1	22	$6,363	3.0
ACU.107Z	Cooling Tower	Climate	Marley	Annex	Roof	2	16	$2,313	3.0
ACU.110	Cooling Tower	Climate	Marley Series	Center1	Roof - West Side	2	15	$2,502	0.0
ACU.130	Air Compressor	Climate	Husky	Annex	Basement Fire Sprinkler Rm	2	13	$3,697	2.0
ACU.156	Chiller	Climate	McQuay	Annex	18th Flr/Penthouse	1	6	$804	
ACU.289	Chiller	Climate	Carrier	Annex	Chiller Room #3	1	4	$610	
ACU.430	Condensing Unit	Climate	Trane	Pavilion	Grd Level-Northside	2	118	$26,604	12.8
AHU.170	Air Handler Unit #1	Climate	Carrier	Center1	Mechanical Room	3	30	$2,735	2.0
AHU.281	Elect Rm Supply Fan	Climate	LC Gemini (Loren	Center1	16th Floor Electrical Room	3	1	$165	
AHU.282	Elect Rm Supply Fan	Climate	LC Gemini (Loren	Pavilion	3rd Floor Electrical Room	3	1	$165	
DOME.256	Chilling System	Climate	York	Pavilion	Maintenance Office	4	17	$2,278	0.0
EMER.165	Back-Up Generator	Emerg Power	Caterpillar	Center1	1st Level Garage - South	4	46	$5,906	0.0
EMER.184	Back-Up Generator	Emerg Power	Genset/Cummins	Center1	Eastsideof Bldg	4	53	$6,183	0.0
EMER.402	Emergency Power	Power	ASCO 7000 Series	Center2	1st Fl Main Electric Rm	4	38	$16,495	
LIGH.121	Life Safety - Exit Lights	Climate	OEM COMPANY	Center1	1st Fl	4	4	$2,792	
VEH.877	Ford 150	Transpo	Ford	Center1	Facilities Services	5	2	$135	
Report Totals								**$95,237**	**25.3**

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Figure 288 Asset Work and Downtime

ASSET REPLACEMENT COSTS

The Asset Replacement Costs report displays the Installation Date, the Useful Life estimate and then calculates the Replacement date and the replacement cost based on data entered on the Asset Detail view.

Report Options: 1) Use the From and To date fields to choose Replacement dates. Performo will look for assets that need to be replaced between the two dates. 2) Optional. Enter a Minimum cost to look for. It may not be necessary to run the report to display every $50 fire extinguisher. 3) Choose the Critical # to report about using checkboxes. Any or all of the checkboxes may be checked.

Asset Replacement Costs
List of assets with replacement costs
Replace Dates 01/01/2018 to 06/12/2018
Generate and print this report
Minimum Cost
Critical # ☑ All ☑ 1 ☑ 2 ☑ 3 ☑ 4 ☑ 5

Wizard Software Solutions
Asset Replacement Costs 2018 YTD
6/16/2018

Asset ID	Name	System	Manufacturer	Division	Suite	Install Date	Useful Life	Replace Date	Replace Cost
2018									
ACU.137	Chiller	Climate	Multi-Stack	Center1	Basement Chiller Room	01/13/03	15 Years	01/13/18	$ 16,000
AHU.171	Air Handler Unit #2	Climate	Carrier	Center1	Mechanical Room	01/14/03	15 Years	01/14/18	$ 57,000
AHU.368	Main Fl Fan Coil Unit	Climate	Carrier	Center2	14th Fl Mech. Rm	02/18/98	20 Years	02/18/18	$ 21,000
ACU.297	Air Compressor	Climate	Quincy	Pavilion	Basement Chiller Room	02/19/03	15 Years	02/19/18	$ 8,300
AHU.365	Main Fl Fan Coil Unit	Climate	Carrier	Center2	11th Fl Mech. Rm	02/28/03	15 Years	02/28/18	$ 18,000
AHU.223	Static Relief Fan	Climate	Twin City	Center1	Mechanical Room	03/23/03	15 Years	03/23/18	$ 6,800
EXHA.152	Exhaust Fan	Climate	Carnes	Center1	Roof	04/13/08	10 Years	04/13/18	$ 39,000
PLUM.104	Circulating Pump	Climate	Reliance	Center1	Chiller/Boiler Room	05/06/08	10 Years	05/06/18	$ 7,500
Subtotal	**2018**								**$ 173,600**
Report Totals									**$ 173,600**

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Figure 289 Asset Replacement Costs

REASSIGNED WORK ORDERS

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Scheduled Reports

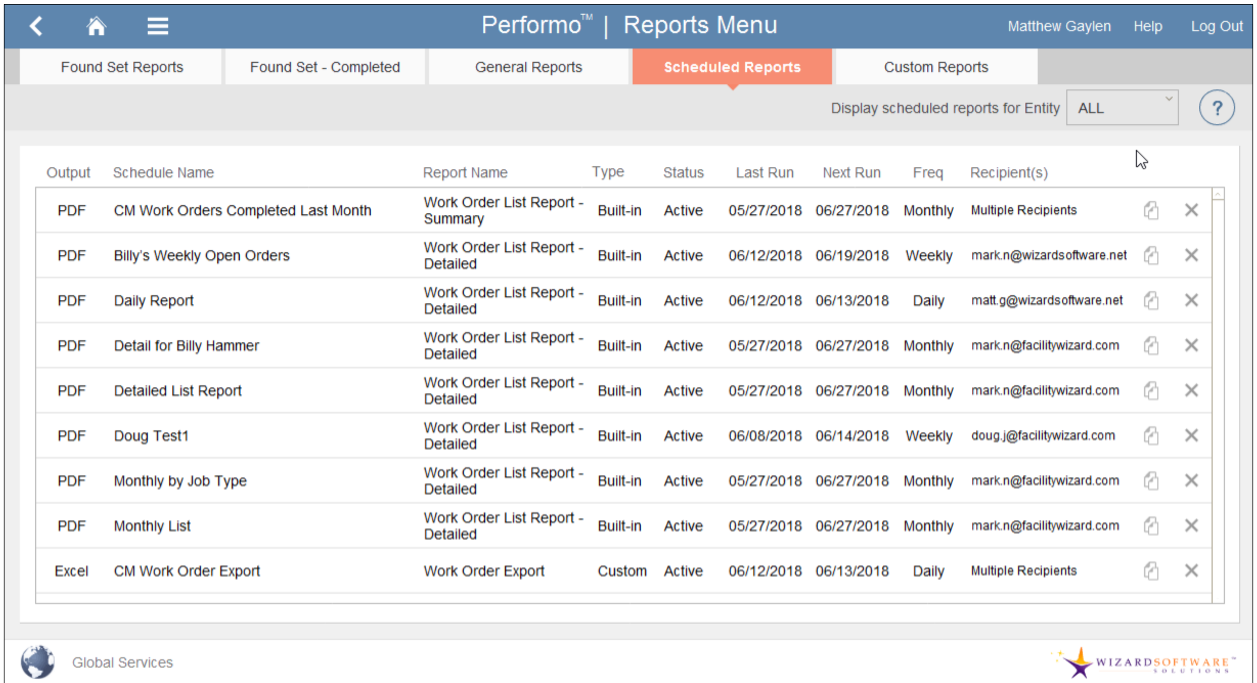


Figure 290 Scheduled Reports

Performo provides the ability to schedule reports. On the Found Set Reports tab, the Lists of Work Orders, and the Counts By Category can be scheduled. On the General Reports tab, the Open Orders Past Target Date can be scheduled. All Custom Reports can be scheduled.

Click the field to the right of Display scheduled reports for Entity. Performo displays the Entity value list. Choose a value to view scheduled reports for that entity.

Click the **QUESTION MARK** icon. Performo displays information about interacting with Scheduled Reports.

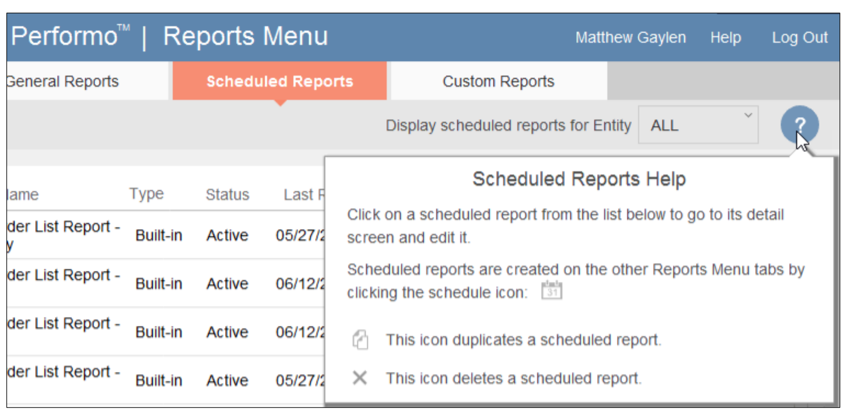


Figure 291 Scheduled Reports Help

In the list view, each row displays one piece of data about the scheduled report. Data displayed on the list view includes Output type, Schedule Name, Report Name, Type, Status, last Run, Next Run, Frequency, Recipient(s).

REPORTS MENU – SCHEDULED REPORT – DETAIL VIEW

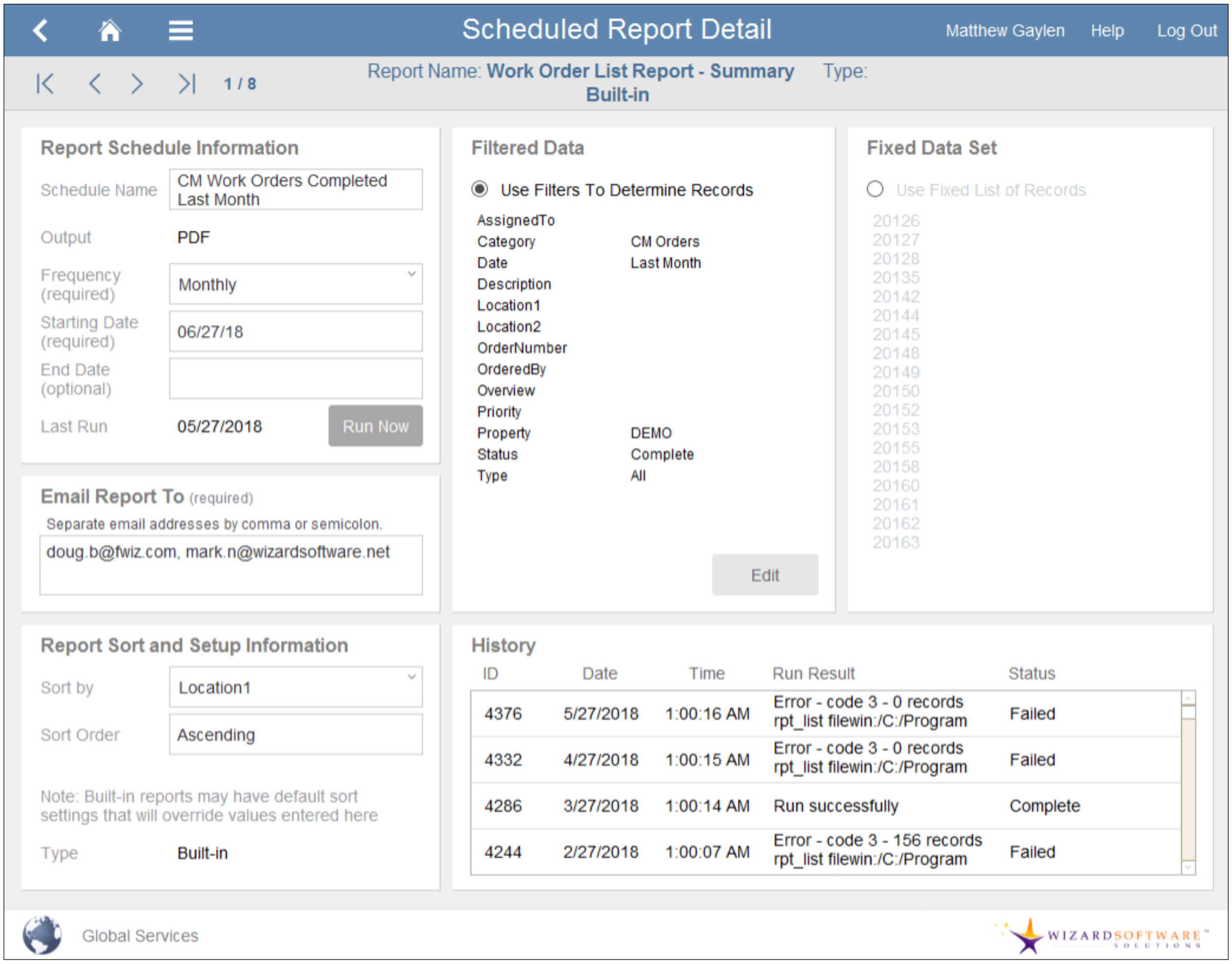


Figure 292 Scheduled Report Detail View

The Scheduled Report Detail displays six sections; Report Schedule Information, Email Report To, Report Sort and Setup Information, Filtered Data, Fixed Data Set, and History.

SCHEDULED REPORT DETAIL VIEW – REPORT SCHEDULE SECTION

The report schedule Information section displays fields for Schedule Name, Output type, Frequency, Starting Date, End Date, and Last Run.

Click the **RUN NOW** button in the Report Schedule Information section. Performo displays a confirmation dialog box. Click the **YES** button to proceed. Performo displays the Confirmation dialog box: *The report has been added to the queue and will be generated and emailed to the recipient(s) entered. Reports may take up to five minutes to process.* Click the **OK** button to close the Confirmation dialog box and return to the Scheduled Report Detail view.

The Schedule Name is user definable. Any text may be entered. Best Practice is to choose a schedule name that describes the report so it can be distinguished from other similar reports in list view.

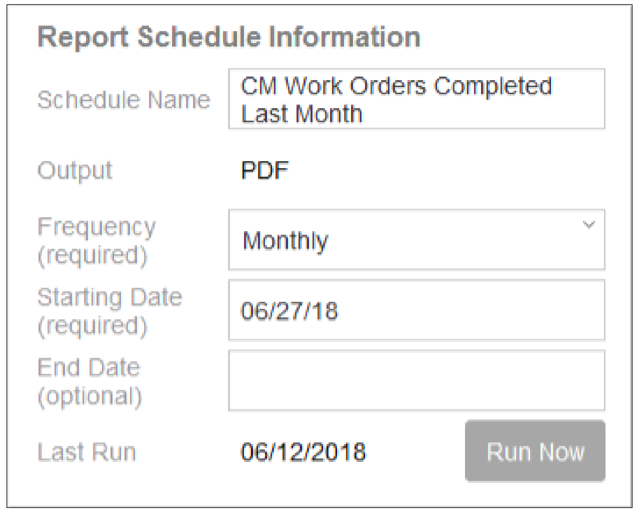


Figure 293 Report Schedule Information

The Frequency value list includes values for One Time, Daily, Weekly, and Monthly.

A starting date is required. Performo generates and sends scheduled reports based on the current date.

An ending date, on the other hand, is not required. A blank ending date causes Performo to run the report into perpetuity.

EMAIL REPORT TO (REQUIRED)

Enter as many email addresses into the field as necessary. Separate email addresses by comma or semicolon. Best Practice is to doublecheck email addresses for typographical errors.

REPORT SORT AND SETUP INFORMATION

Report Sort and Setup Information includes fields for Sort by and Sort Order, and type. Note: Built-in reports may have default sort settings that will override values entered here.

The Sort By value list includes values such as Assign To, Category, Floor, Job Type, Location1, Order By, Order Number, Priority, PropertyID (aka Entity), Start Date, and Status.

The Sort Order value list includes options for Ascending, and Descending.

SCHEDULED REPORT DETAIL – FILTERED DATA SECTION

Click the radio button for **USE FILTERS TO DETERMINE RECORDS**. Performo displays the fields included on the report, and displays the criteria to be used to find and display records for the report. Click the **EDIT** button. Performo displays the Edit Report Filters pop up window. Click the **PREVIEW** checkbox. Perfromo displays a list view of the records included in the found set. The preview updates automatically when filters are edited. Click the **RESET FILTERS** button to start over. Click the **OK** button to proceed. The Filter Data displayed, matches the selections in the Edit Report Filters pop up window.

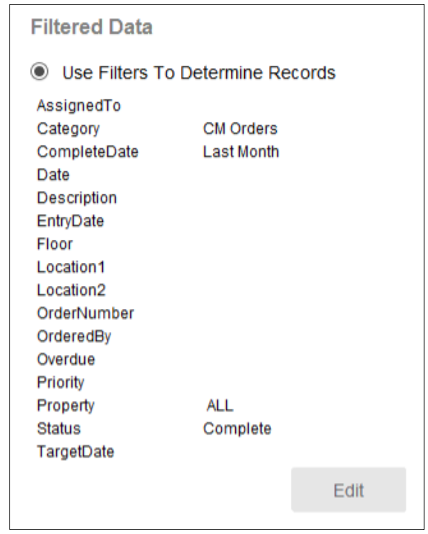


Figure 295 Filtered Data

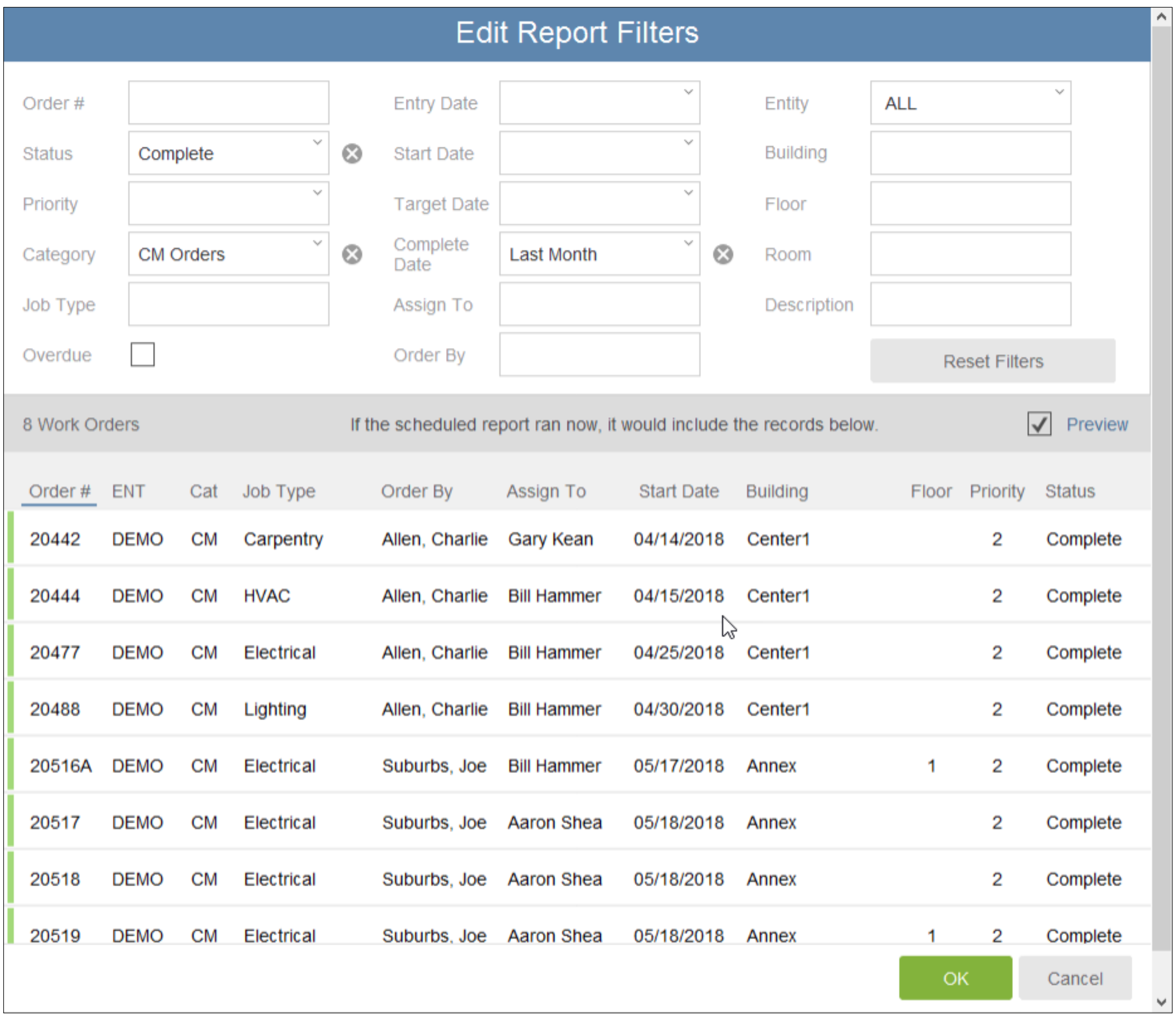


Figure 294 Edit Report Filters w/Preview

FIXED DATA SET

Click the radio button for **FIXED DATA SET**. Note that one radio button will always be checked… either Filtered Data or Fixed Data Set. Performo displays the record ID numbers for the records included in the found set. Future instances of this report will only include data for these reports.

This choice periodically generates a report about specific records, and automatically sends it to designated recipients.

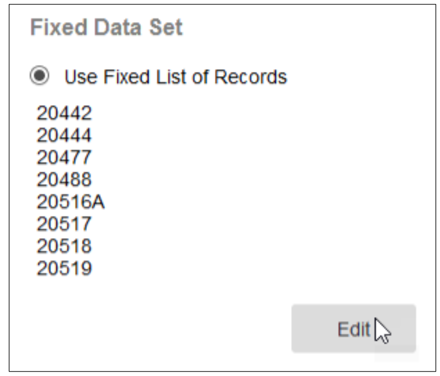
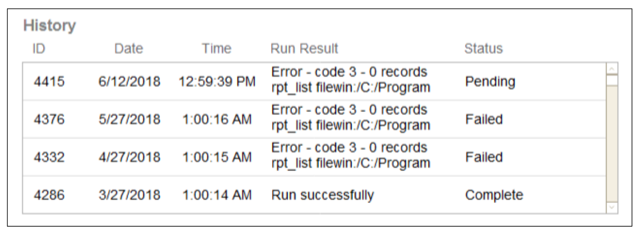


Figure 296 Fixed Data Set

Click the **EDIT** button. Performo displays the Edit Report Filters pop up window. Click the **PREVIEW** checkbox. Perfromo displays a list view of the records included in the found set. The preview updates automatically when filters are edited. Click the **RESET FILTERS** button to start over. Click the **OK** button to proceed. The Filter Data displayed, matches the selections in the Edit Report Filters pop up window. See Figure 294 Edit Report Filters w/Preview.

HISTORY SECTION

The History section displays a record of each time the report was generated. Data displayed includes ID, Date, Time, Run Result, and Status.



History

ID	Date	Time	Run Result	Status
4415	6/12/2018	12:59:39 PM	Error - code 3 - 0 records rpt_list filewin:/C:/Program	Pending
4376	5/27/2018	1:00:16 AM	Error - code 3 - 0 records rpt_list filewin:/C:/Program	Failed
4332	4/27/2018	1:00:15 AM	Error - code 3 - 0 records rpt_list filewin:/C:/Program	Failed
4286	3/27/2018	1:00:14 AM	Run successfully	Complete

Figure 297 Scheduled Report Detail – History Section

If there are zero records in the found set, the Run Result will display Error Code #3 and the Status field will display the Failed value. Re-filtering the data can have a positive and significant effect on the found set generated by Performo.

SCHEDULED REPORT

Sample.

Wizard Software Solutions

Work Order Summary Report

6/12/2018

ENT	Order #	Date	Order By	Dept	Job Type	Division	Suite	Assign To	Pri	Date Done
Aaron Shea										
DEMO	20517	05/18/18	Suburbs, Joe	Facilities	Electrical	Annex	18552	Aaron Shea	2	05/30/18
DEMO	20518	05/18/18	Suburbs, Joe	Facilities	Electrical	Annex	18552	Aaron Shea	2	05/18/18
DEMO	20519	05/18/18	Suburbs, Joe	Facilities	Electrical	Annex	18552	Aaron Shea	2	05/18/18
Subtotal		**3 Work Orders**		**0 Open**	**3 Completed**	**0 DNC**				
Bill Hammer										
DEMO	20444	04/15/18	Allen, Charlie	Executive	HVAC	Center1	1320	Bill Hammer	2	05/01/18
DEMO	20477	04/25/18	Allen, Charlie	Executive	Electrical	Center1	1320	Bill Hammer	2	05/03/18
DEMO	20488	04/30/18	Allen, Charlie	Executive	Lighting	Center1	1320	Bill Hammer	2	05/04/18
DEMO	20516A	05/17/18	Suburbs, Joe	Facilities	Electrical	Annex	lobby	Bill Hammer	2	05/18/18
Subtotal		**4 Work Orders**		**0 Open**	**4 Completed**	**0 DNC**				
Gary Kean										
DEMO	20442	04/14/18	Allen, Charlie	Executive	Carpentry	Center1	1320	Gary Kean	2	05/02/18
Subtotal		**1 Work Orders**		**0 Open**	**1 Completed**	**0 DNC**				

Facilities Engineering Management

Page 1

Figure 298 Scheduled report as it appears in PDF format after having been received via email message

Custom Reports

Click the **CUSTOM REPORT** tab. Performo displays the Custom Reports list view.

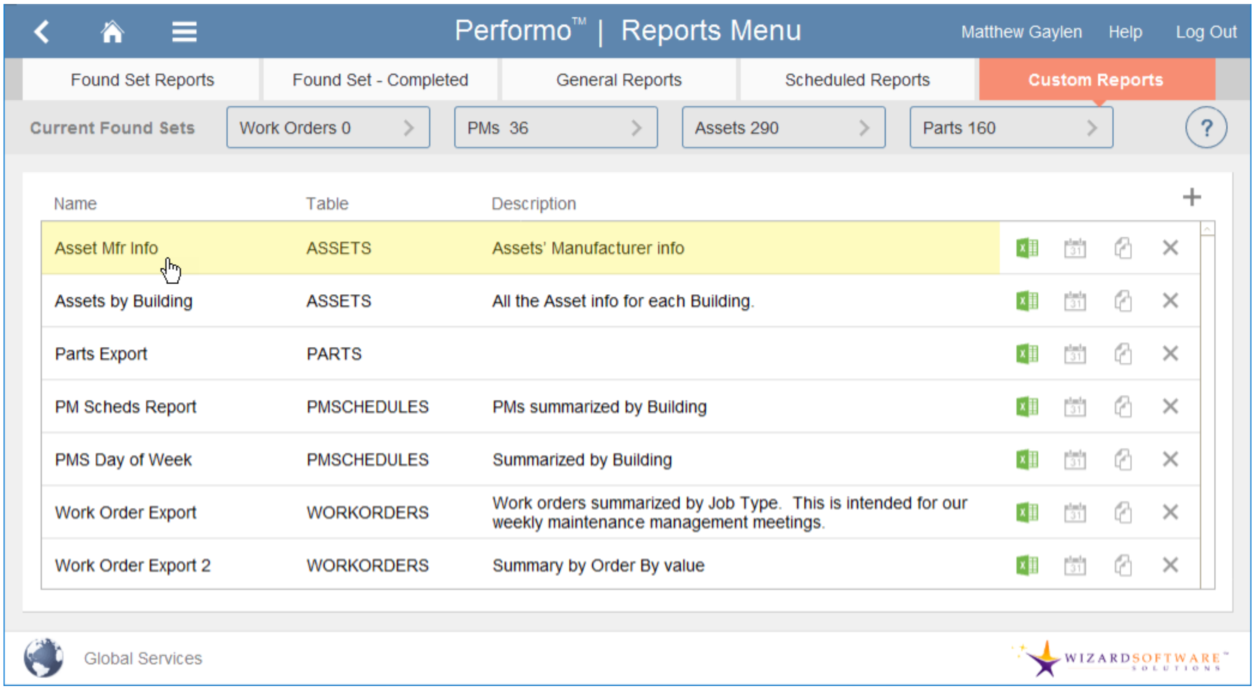


Figure 299 Custom Reports

The Custom Reports tab displays one line for each record. Data displayed includes, Name, Table, and Description.

Click the **MICROSOFT EXCEL** button. Performo opens the operating system Save As dialog box. The exported **XLS** file can be saved in any accessible directory.

The calendar icon is the **SCHEDULED REPORT** button. Click the calendar icon. Performo displays the Scheduled Report Detail view. Scheduled reports are discussed in a separate section of this user reference guide.

Click the **DUPLICATE** button. Performo creates an exact copy of the custom report and names it, “Copy of <report name>. Click anywhere on the Copy. Performo displays the detail view.

Click the **DELETE** button. Upon confirmation, Performo will delete the custom report.

The Add New Record button is displayed in the same of a plus sign. Click the **+** sign. Performo displays the Custom Report Detail view. Interact with the four sections on the detail view to create a new custom report from scratch.

CUSTOM REPORT DETAIL VIEW

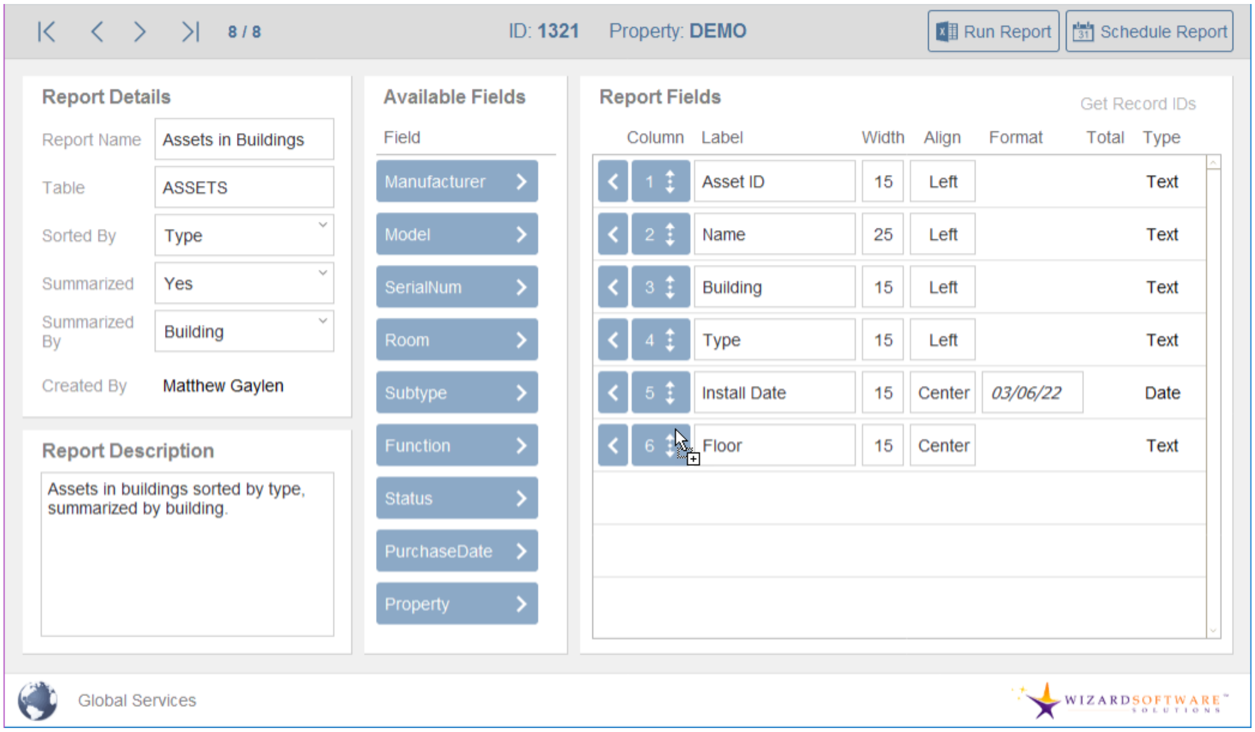


Figure 300 Custom Report Detail View

The Custom Report Detail view displays four sections; Report Details, Report Description, Available Fields, and Report Fields.

Start by choosing a Table in the Report Details section. Performo immediately displays a list of options in the Available Fields section. Next, choose a Report Name. Choose a value from the Sorted by value list. Choose a value from the Summarized value list. Choose a value from the Summarized By value list.

Enter a brief overview in the Report Description field. Best Practice: start with why the report is needed. Continue in the Available Fields section. Click the arrow button on the field name to move the field from Available Fields to Report Fields. Report Fields will appear on the report.

In the Report Fields section, The Label is a user definable column heading. Rename or edit the column heading if necessary. The width is listed in points. Enter the number of points for the field width. 12 points is an inch. Choose an alignment. If the field contains a number, a syntax can be chosen using the Format value list. Data in that field will be displayed in that format. If the field is numerical, a checkbox appears in the Total column. Check the **TOTAL** checkbox. Within the report, Performo will display totals for that column.

RUN REPORT BUTTON

Click the **RUN REPORT** button on the Actions bar of the Custom Report Detail view. Performo opens the operating system Select File Export location dialog box. Choose a directory. Click the **OK** button to proceed. Performo saves the document in the directory. Performo displays the Report Saved dialog box. The Report Saved dialog box displays the path to the document. Click the **OK** button. Performo opens the report using the operating system default for **XLS** files. Best Practice: every report does not need every field. Try to distill the report down to the essentials. Sometimes … less is more.

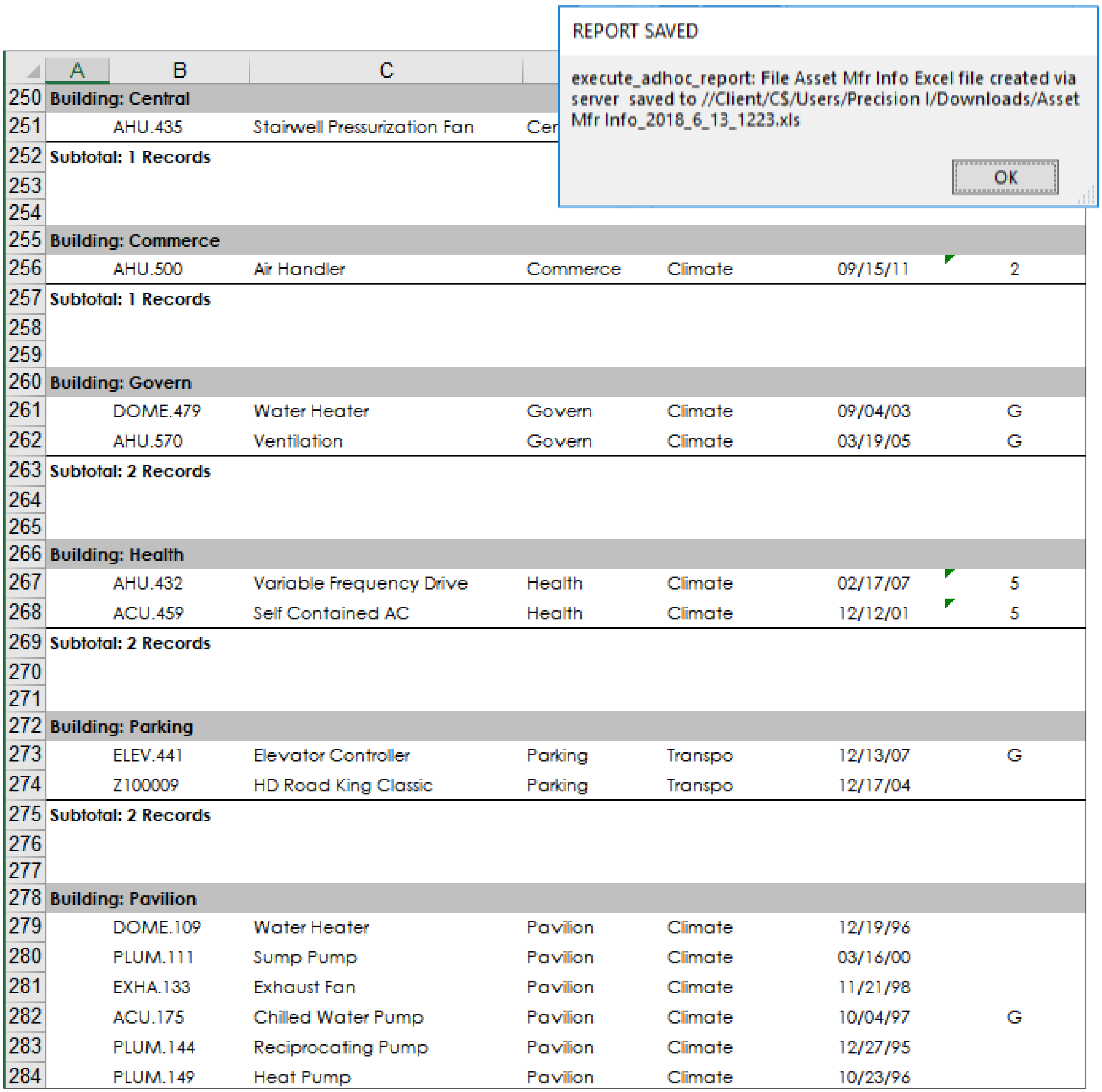


Figure 301 Custom Report

Issues Log

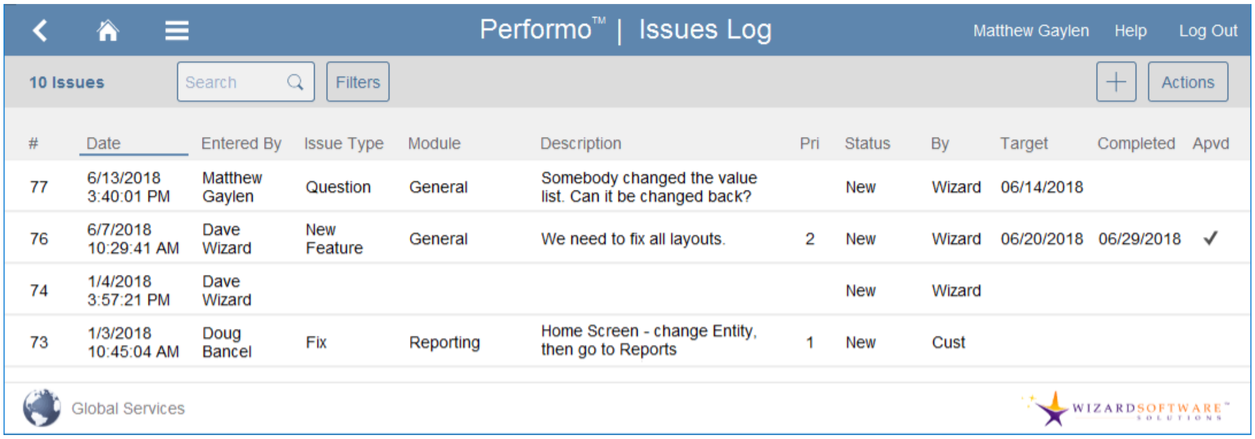


Figure 302 Issues Log

The Issues Log is for entering, editing and managing topics, tasks, and inquiries. Each company, corporation and institution configures the Issues Log to accommodate their business needs and corporate culture. Generally, the Issues Log can be set up so that the Solution Admin and Wizard Support receive notifications of activity.

The Issues Log displays one row for each item. Data displayed includes issue number, Date, Entered By, Issue Type, Module, Description, Priority, Status, By, Target date, and Completed date. The Solution admin uses the Approved checkbox in situations where the item requires hours of professional services or if the request affects other Performo users.

ISSUES LOG DETAIL VIEW – ACTIONS MENU

Click the **ACTIONS MENU** button on the Actions bar on the Issues Log list view. Performo opens a dialog box. Click the **DELETE ISSUE** option. Performo permanently removes the issue. Upon approval… there is no undo.

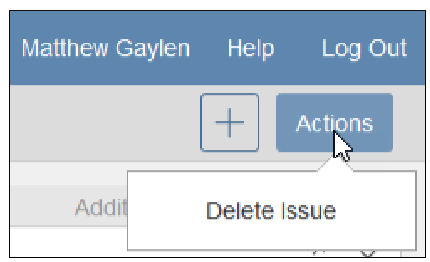


Figure 303 Actions Menu > Delete Issue

LOG A NEW ISSUE

Click the **ADD NEW RECORD** button on the Actions bar of the Issue Log list view. Performo navigates to the Issue Detail view.

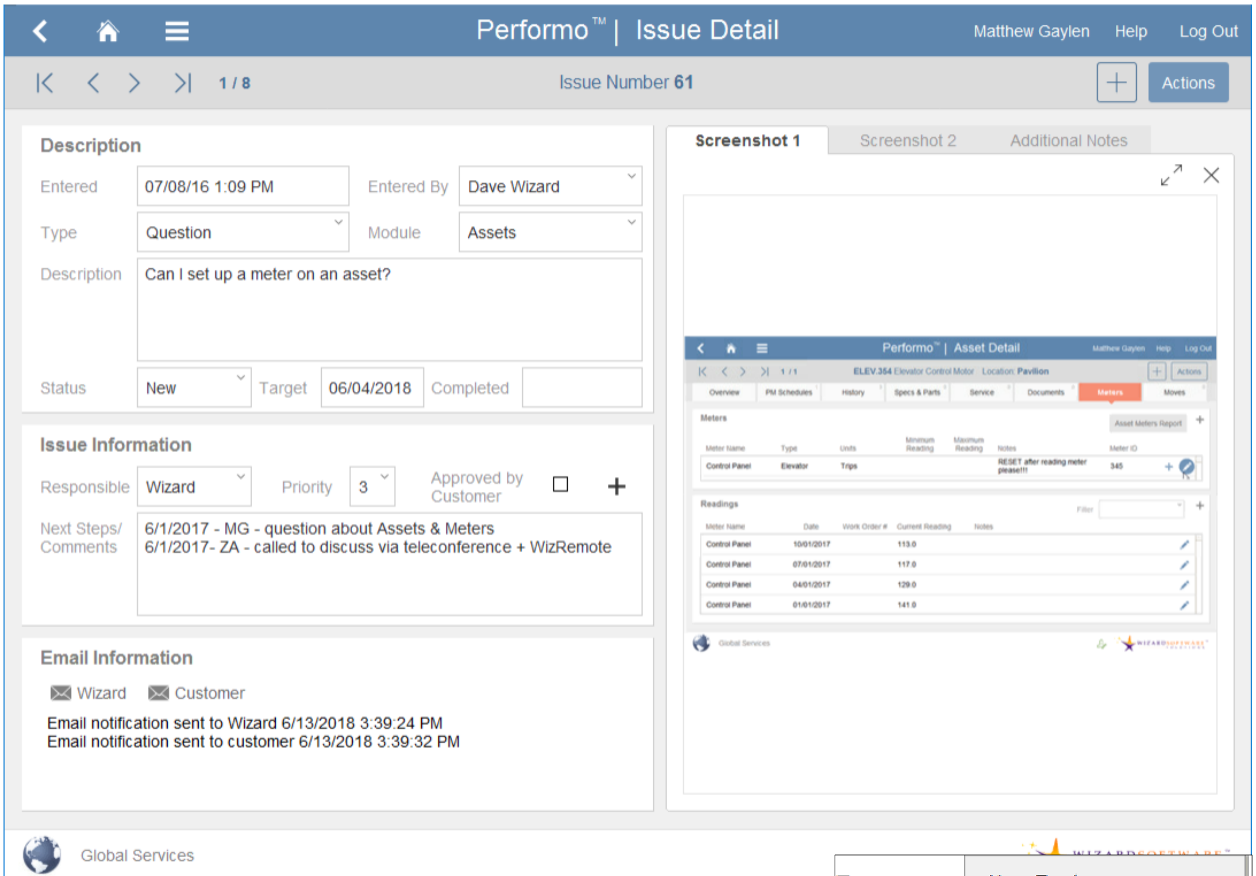


Figure 305 Issue Detail view.

The Issue Detail view is divided into four sections: Description, Issue Information; Email Information, and Screenshot 1. There are also tabs for Screenshot 2, and Additional Notes.

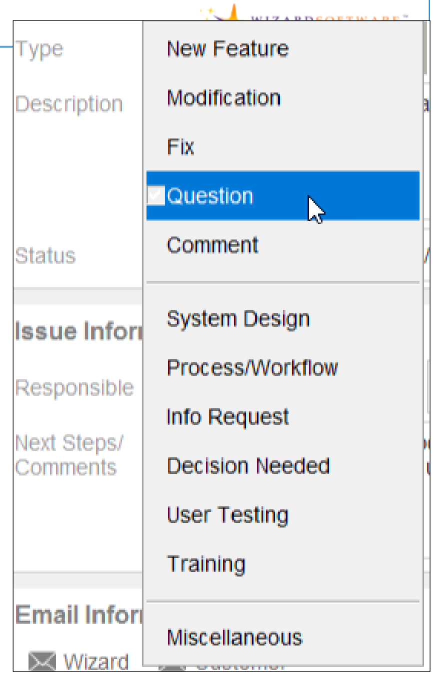


Figure 304 Issue Types

ISSUE DETAIL – DESCRIPTION SECTION

Fields in the Description section include Entered, Entered By, Type, Module, Description, Status, Target, and Completed. Entered is an automatically calculated and displayed time and date stamp. It is not user-definable. The Issue Types value list is based on our experience. Contact the Solution Admin if different values are required or if some values are not needed.

The Description field in the Description section is user definable. Enter any text. Best Practice: it is always good to say what screen you were on when you experienced the issue. The Title Bar always displays the name of the screen. Including the title of the screen provides context for project engineering when opening an investigation into an issue.

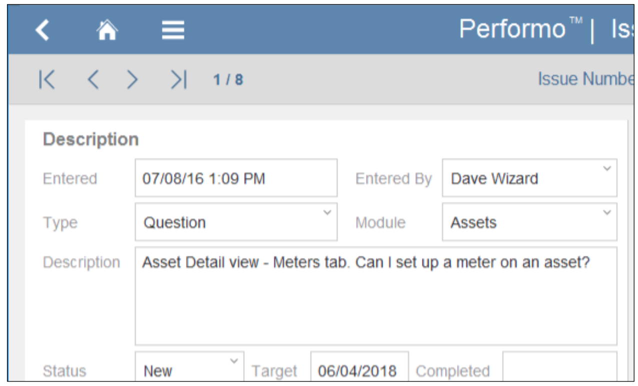


Figure 306 Issue Detail view

ISSUE DETAIL – ISSUE INFORMATION SECTION

The Issue Information section displays fields for Responsible, Priority, and Next Steps / Comments. There is also a checkbox for Approved by Client. Click the **APPROVED BY CLIENT** checkbox. Among other things; this alerts the project engineering team that hours for professional services has been approved.

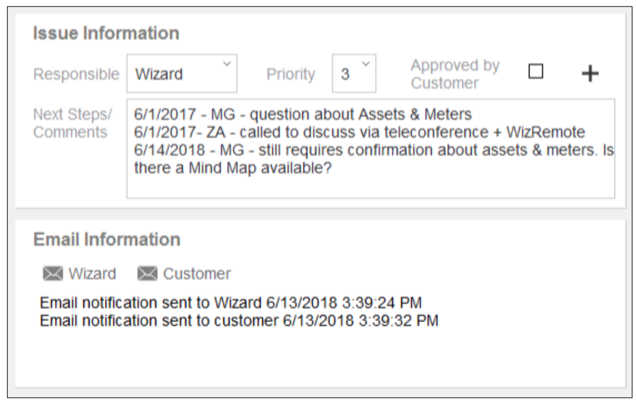
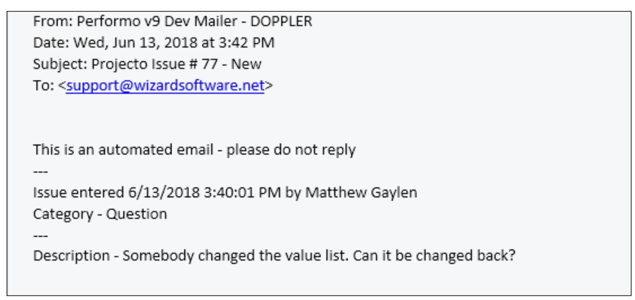


Figure 307 Issue Information & Email Information Sections

Click the + button in the Issue Information section. Performo adds a date stamp on a new line at the end of the text thread. Best practice is to enter your initials and begin typing next steps, status updates, or comments. Use the Responsible value list to choose who is expected to respond next.


From: Performo v9 Dev Mailer - DOPPLER
Date: Wed, Jun 13, 2018 at 3:42 PM
Subject: Projecto Issue # 77 - New
To: <support@wizardsoftware.net>

This is an automated email - please do not reply

Issue entered 6/13/2018 3:40:01 PM by Matthew Gaylen
Category - Question

Description - Somebody changed the value list. Can it be changed back?

Figure 308 Issues Log Email Notification Message

ISSUE DETAIL – EMAIL INFORMATION SECTION

The Email Information section displays a list of email notifications that were sent including recipients and a time and date stamp. Click the **WIZARD** button. Performo sends an email message to support@wizardsoftware.net which is a special electronic mail box monitored by the whole support team at Wizard Software. Click the **CLIENT** button. Performo sends an email message to the Solution Admin and any other designated recipients. Recipients are designated during project implementation.

ISSUE DETAIL – SCREENSHOT 1 TAB

Screenshots can be a big help when communicating with the Wizard Software support team. Screenshots provide context and details about an issue that might be difficult to describe. A picture is worth a significant number of words.

The Screenshot 1 tab displays the Screenshot 1 container field.

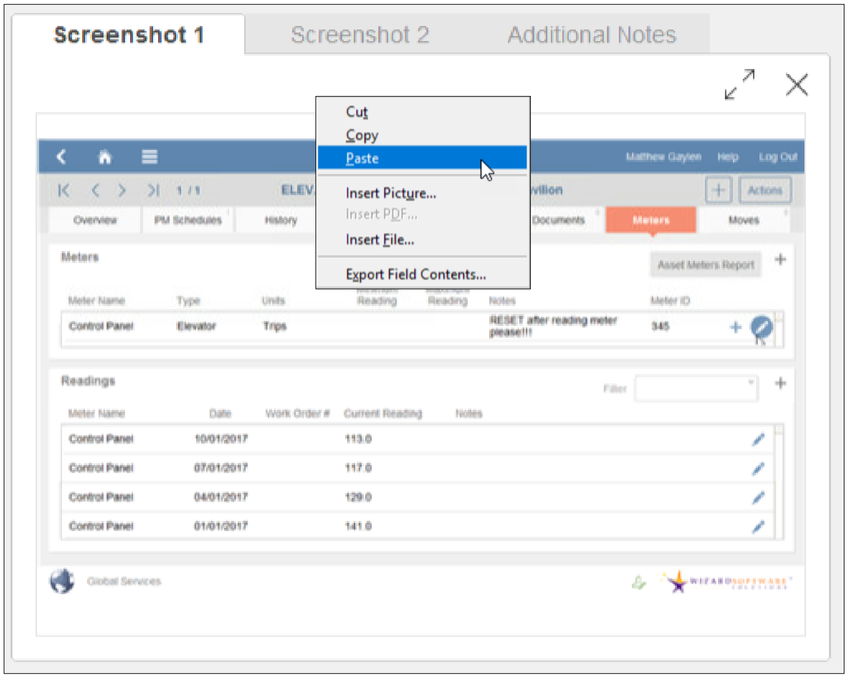


Figure 309 Issue Detail - Screenshot 1 Tab

Right-click on the container field. The operating system displays a menu of options that will include Cut, Copy, Paste, Insert Picture, Insert File, and Export Field Contents.

Most often, if a screen shot application is used, a copy can be saved to the clipboard. This makes the right-click + paste option very expedient for sharing images in the container field. Choose **INSERT PICTURE** or **INSERT FILE**. The standard operating system dialog will open. Navigate to the file and click **OK** to proceed. The image will appear in the container field if it is a standard image format.

Click the **ENLARGE** button. Performo displays the screenshot full on a layout that is the full size of the application window. Click the **BACK** button to return to Issue Detail view.

Click the **CLEAR DOCUMENT** button. Performo will remove the screenshot from the container field. Interesting tidbit. As long as the cursor does not go anywhere else, the Control+Z keyboard shortcut can be used to restore the image in the container field.

Screenshot 2 is exactly the same as Screenshot 1.

The Additional Notes tab is a text field. Any text may be entered.

ACTIONS ON THE ISSUES LOG LIST VIEW – ISSUES LOG REPORT

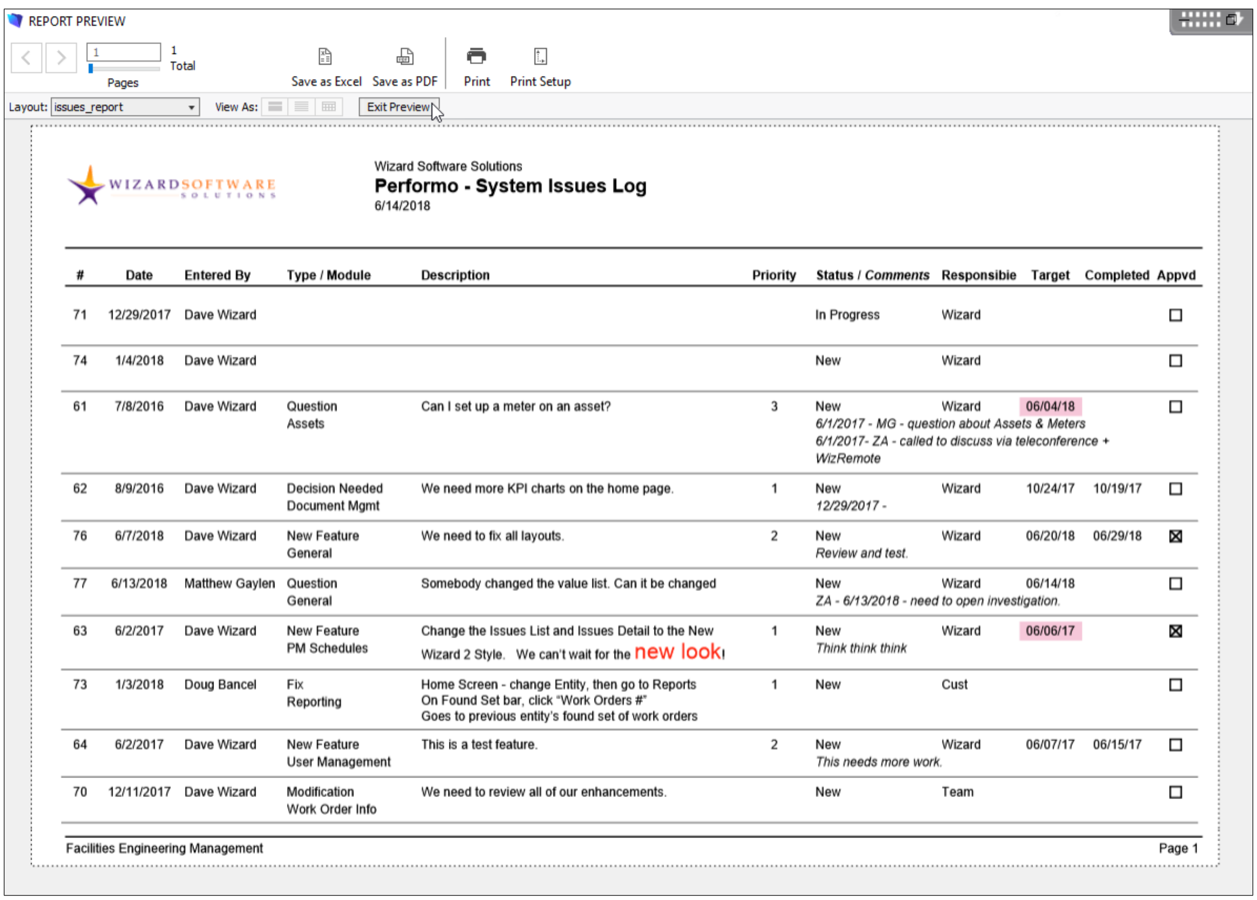
Click the **ACTIONS MENU** button on the Actions bar of the Issues Log list view. Click the **ISSUES LOG REPORT** option. Performo displays the Edit Report Title dialog box. Accept the default title or enter a new title. Click the **OK** button. Performo displays the Report Preview.

Click **SAVE AS PDF**. Performo will open the standard operating system dialog box. Users will navigate to an accessible directory, name the file as needed and finish the process by clicking the **SAVE** button.

Click the **PRINT SETUP** or the **PRINT** button to view the standard operating system dialog boxes for these commands.

If the report contains multiple pages, the navigation buttons can be used to view previous and succeeding pages of the report.

Click the **EXIT PREVIEW** button to return to the Issues Log list view.



Wizard Software Solutions
Performo - System Issues Log
6/14/2018

#	Date	Entered By	Type / Module	Description	Priority	Status / *Comments*	Responsible	Target	Completed	Appvd
71	12/29/2017	Dave Wizard				In Progress	Wizard			☐
74	1/4/2018	Dave Wizard				New	Wizard			☐
61	7/8/2016	Dave Wizard	Question Assets	Can I set up a meter on an asset?	3	New *6/1/2017 - MG - question about Assets & Meters* *6/1/2017- ZA - called to discuss via teleconference + WizRemote*	Wizard	06/04/18		☐
62	8/9/2016	Dave Wizard	Decision Needed Document Mgmt	We need more KPI charts on the home page.	1	New *12/29/2017 -*	Wizard	10/24/17	10/19/17	☐
76	6/7/2018	Dave Wizard	New Feature General	We need to fix all layouts.	2	New *Review and test.*	Wizard	06/20/18	06/29/18	☒
77	6/13/2018	Matthew Gaylen	Question General	Somebody changed the value list. Can it be changed		New *ZA - 6/13/2018 - need to open investigation.*	Wizard	06/14/18		☐
63	6/2/2017	Dave Wizard	New Feature PM Schedules	Change the Issues List and Issues Detail to the New Wizard 2 Style. We can't wait for the new look!	1	New *Think think think*	Wizard	06/06/17		☒
73	1/3/2018	Doug Bancel	Fix Reporting	Home Screen - change Entity, then go to Reports On Found Set bar, click "Work Orders #" Goes to previous entity's found set of work orders	1	New	Cust			☐
64	6/2/2017	Dave Wizard	New Feature User Management	This is a test feature.	2	New *This needs more work.*	Wizard	06/07/17	06/15/17	☐
70	12/11/2017	Dave Wizard	Modification Work Order Info	We need to review all of our enhancements.		New	Team			☐

Facilities Engineering Management — Page 1

Figure 310 System Issues Log Report

Addendum I: User Management

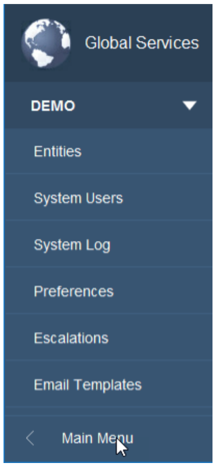
This section provides information almost exclusively for the Solution Admin. Many of the screens, features and functions are only accessible to the Solution Admin.

USER ACCESS RULE

Everyone who accesses Performo needs to be set up with a record in the System Users module. The System Users module is only accessible to the Solution Admin via the **SYSTEM ADMINISTRATION** button.

The exception to this is when Active Directory is implemented locally for the Requester Interface. In this use case; Requesters do not need to have a record in the System Users module because authentication is handled via Active Directory.

Prior to creating new users, please refer to guidelines set forth in the Wizard Software Solutions licensing agreement provided to all Solution Admins.

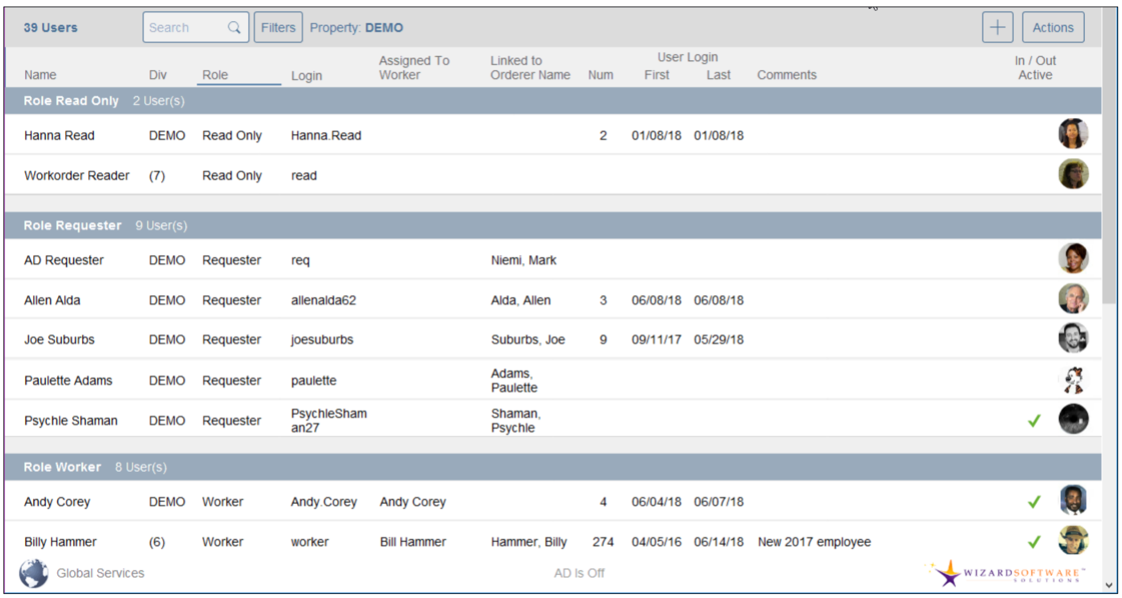


311 Sys Admin

System User List View

Click the **SYSTEM ADMINISTRATION** button at the bottom of the Main Menu of the Home Screen. Performo displays the System Administration modules. In Performo, the System Administration modules are Entities, System Users, System Logs, Preferences, Escalations, and Email Templates. Click the **SYSTEM USERS** button to navigate to the list view.

The System User List view displays rows of records. Each column is one piece of data about a user and each row displays information about one user. Columns displayed in list view include Name, Division, Role, Login, Assigned To Worker, Linked To Orderer Name, Number, User Login First Name, and Last Name, Comments.



Name	Div	Role	Login	Assigned To Worker	Linked to Orderer Name	Num	User Login First	Last	Comments	In / Out Active
Role Read Only 2 User(s)										
Hanna Read	DEMO	Read Only	Hanna.Read			2	01/08/18	01/08/18		
Workorder Reader	(7)	Read Only	read							
Role Requester 9 User(s)										
AD Requester	DEMO	Requester	req		Niemi, Mark					
Allen Alda	DEMO	Requester	allenalda62		Alda, Allen	3	06/08/18	06/08/18		
Joe Suburbs	DEMO	Requester	joesuburbs		Suburbs, Joe	9	09/11/17	05/29/18		
Paulette Adams	DEMO	Requester	paulette		Adams, Paulette					
Psychie Shaman	DEMO	Requester	PsychieShaman27		Shaman, Psychie					✓
Role Worker 8 User(s)										
Andy Corey	DEMO	Worker	Andy.Corey	Andy Corey		4	06/04/18	06/07/18		✓
Billy Hammer	(6)	Worker	worker	Bill Hammer	Hammer, Billy	274	04/05/16	06/14/18	New 2017 employee	✓

Figure 312 Performo User List aka System User List

Click the column headings to sort by that value. Where it makes sense, Performo will display subheadings with the subtotal of items listed under that subheading.

Use the Global Search field or the **FILTERS** button to display a found set of exactly, and only the users that need to be managed.

The right-most column of every row is the Thumbnail container field. Right-click the **THUMBNAIL** container field. Performo displays the operating system options. Step #2 is to choose **PASTE** from the right-click list. Step #1 would be to copy a selfie.

TWO WAYS TO NAVIGATE TO DETAIL VIEW

Click anywhere on any row. Performo navigates to the User Detail view.

Click the **NEW USER** button. Performo navigates to the User Detail view.

USER PHOTO

On the system User List view, click the checkbox in the In / Out Active column. Performo will display that user's name on the In / Out Board section of the Team tab on the Home Screen.

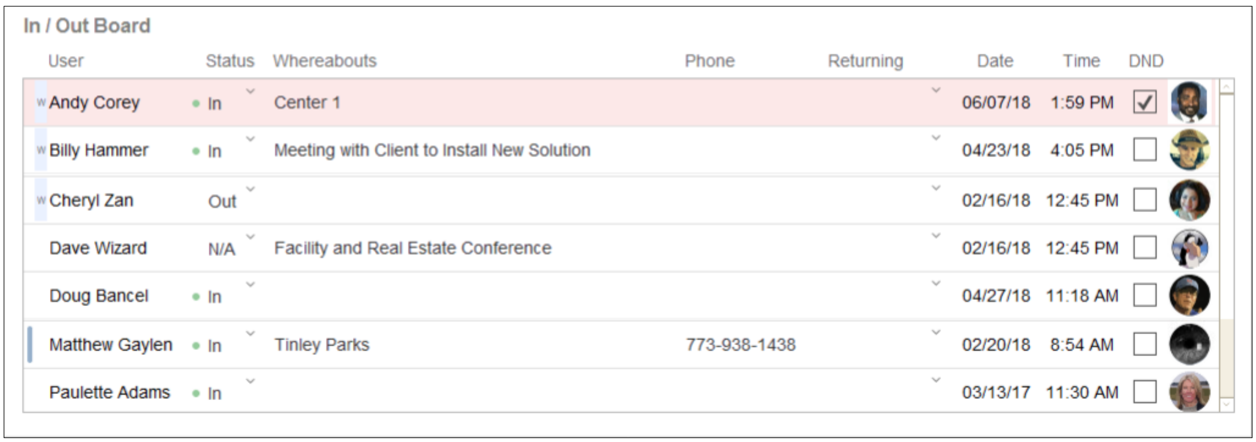


Figure 313 In / Out Board - Home Screen Team Tab

ACTIONS ON THE SYSTEM USER LIST VIEW – GO TO ROLE LIST

Click the **ACTIONS** button on the Actions bar on the System User List view. Performo displays the Actions value list. Click **GO TO ROLE LIST**. Performo displays the Role List view.

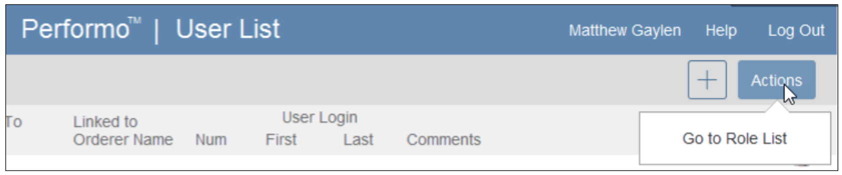


Figure 314 - Actions Button, Actions Bar, System User List View

The Role List displays Role Name, Number of Users assigned to that role, and the number of Can Dos.

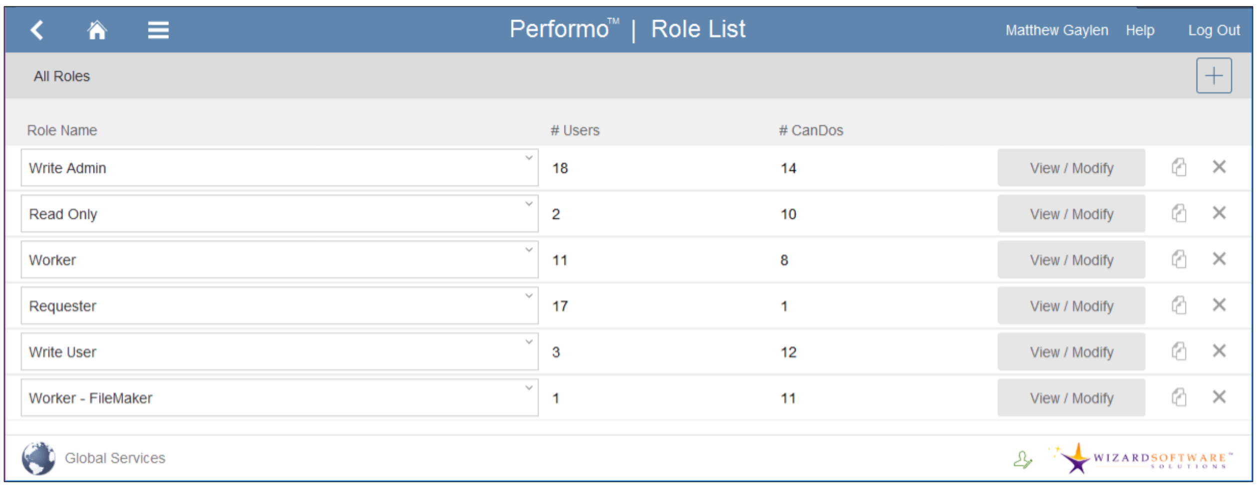


Figure 315 System Administration > User List Actions > Role List

Common role names are: Write Admin, Read Only, Worker, Requester, Write User, Worker - FileMaker.

Role Names are user definable… any name may be chosen. Roles define privileges for users who log in. Exception: The Role Name *Requester* cannot be renamed because of the way it is related to the requester web interface.

ROLE LIST VIEW RECORD OPTIONS

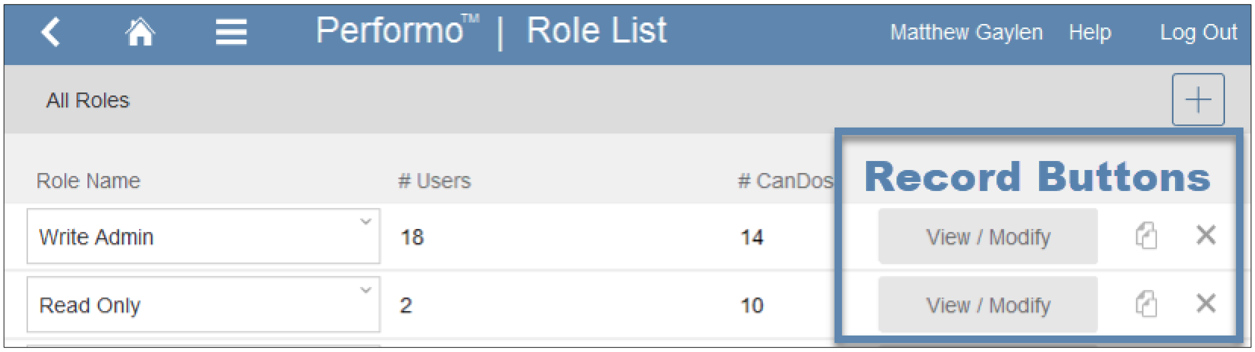


Figure 316 Role List Record Buttons

To the right Of each role name record there is a View / Modify button, a Duplicate button, and a Delete button.

Click the **DUPLICATE** button. Performo displays the Duplicate Role dialog box. Enter a name for the role. Click the **OKAY** button to proceed.

Click the **DELETE** button – the white x in the red circle. Performo displays the Delete User Role dialog box. “Delete the selected Read Only Role? There are 2 users currently assigned to this role – they will have to be reassigned.” Click the **OK** button to proceed.

ROLE LIST ACTIONS BAR – ADD NEW RECORD BUTTON

 Click the **NEW ROLE** button. Performo opens the New Role dialog box. Enter a unique role name. Click the **OK** button. Performo displays the Role Setup data entry window. Role Setup is discussed in the very next section of this user guide.

ROLE SETUP

Click the **VIEW / MODIFY** button. Performo displays the Role Setup data entry window. The Role Setup data entry window is where Roles are assigned Can Dos. Each role is privileged to do the things defined in the User Can portal.

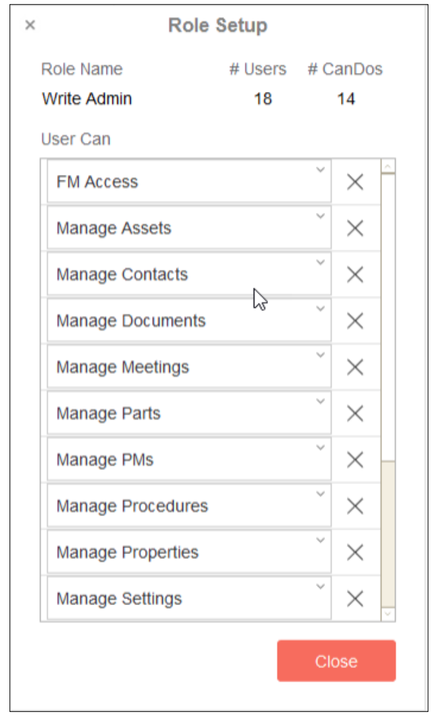


Figure 317 Role Setup Data Entry Window

The options are broken down into 5 main categories.

1. Access Via *(at least one must be selected)*
    a. FileMaker & FileMaker Go
    b. Web Requester
    c. Web Worker
2. View
3. Edit
4. Create
5. Manage *(delete)*

Any number of can dos can be selected, but the View, Edit, Create, and Manage Can Dos are subsets of each other.

Figure 318 Can Dos for View, Edit, Create, & Manage

View means the user can see the screens in the module.

Edit means the user can edit the fields on the screens in the module. When Edit is chosen, View rights are automatically included.

Create means the user can view, edit and also create new records on the screens in the module. When create is chosen, View and Edit rights are automatically included.

Manage means the user can view, edit, create and also delete records on the screens in the module. When Manage is chosen, View, Edit, and Create rights are automatically included.

The Worker Role

Roles are for designating, delineating and defining user types. Accounts for workers, requesters, departmental users and the Solution Admin are managed using Roles. Roles are composed of Can Dos – permissions and privileges – things people in that role can do. The idea is to provide each Role with the CanDos to perform the duties of that job.

In Performo; custodians, engineers and other tool-bearing maintenance staff are referred to as workers. Workers are initially set up with a record in the Workers module (Workers Module, page #161). If workers are interacting with Performo using a computer, tablet or other device; then, each worker will have a license and a record in the System Users module.

WORKER SETUP

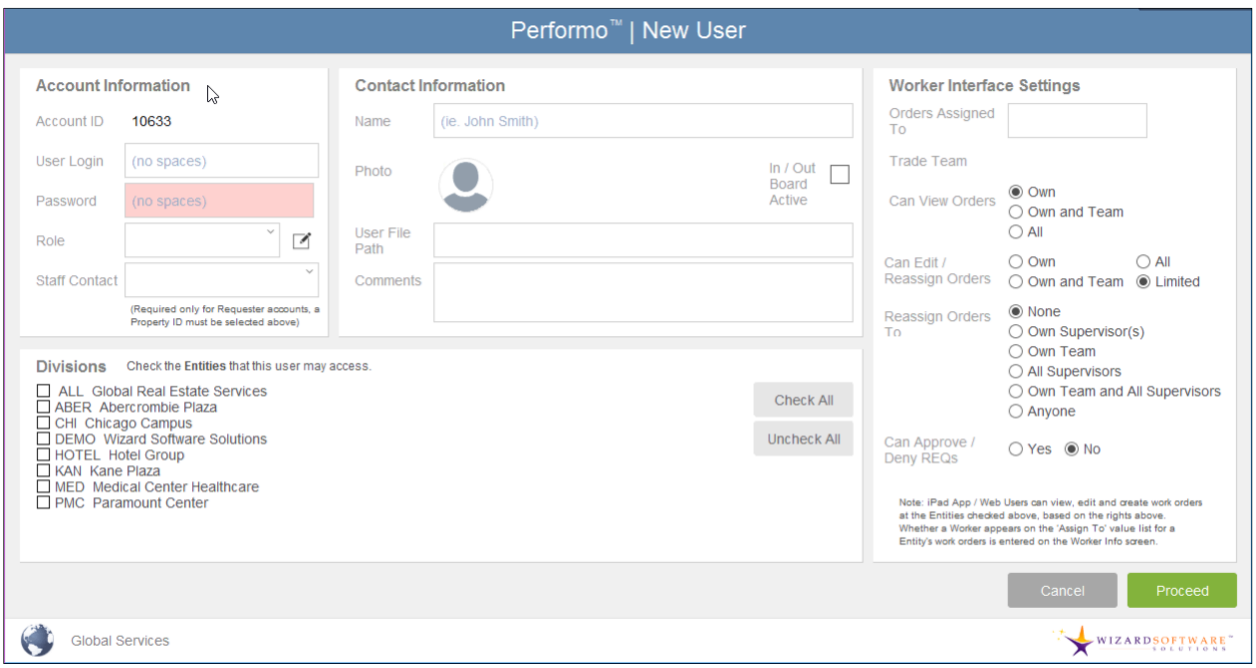


Figure 319 New User Data Entry Screen

Click the **NEW USER** button on the Actions bar of the User Detail view. Performo displays the New User data entry screen. The Account Login ID is automatically calculated. Contact the Solution Admin if user Account IDs have to match account numbers generated by the Human Resources department.

Enter a User Login. The User Login is a user-definable text field. The only limitation is no spaces are allowed in the user login. Also, more than 14 characters in a user login may yield unexpected results in some instances.

The User Password field is also a user-definable text field. Again, the only limitation is no spaces are allowed in the password field. Contact the **SOLUTION ADMIN** if your company, corporation or institution requires special characters in passwords for facility maintenance software. Click the **ROLE** field. Performo displays the Role value list. Choose **WORKER**.

DIVISIONS (AKA ENTITIES)

Figure 320 New Work Setup - Divisions

In the Divisions section, click the checkbox corresponding to the locations where the worker will be assigned work orders. Click the **CHECK ALL** button. Performo checks all the boxes and the worker will be assigned work orders in all entities. Click the **UNCHECK ALL** button. Performo removes checks from all entities. This is the start-over option.

For workers, check at least one division not counting the All Division. Remember that the All division is a special entity that aggregates data from all the other entities. It is used for reporting and analysis and not used for data entry.

WORKER ROLE SETUP

Figure 321 System User Detail View - Worker Setup

Tool-bearing staff are assigned the Worker role in the Account Information section of the System User Detail view. In the Worker Interface Settings section, click the **ORDERS ASSIGNED TO** field. Performo displays a value list of all the workers setup in the Workers module. **The worker named in the Contact Information section has the privileges set forth in the Worker Interface Settings section for the worker selected in the Worker Interface Settings section.** In other words, when the worker named in the Contact Information section logs in, that worker will see work orders assigned to the name selected in the Orders Assigned To field.

WORKER INTERFACE SETTINGS

The Trade Team field is automatically imported from the worker record in the Workers module.

Can View Orders is divided into radio buttons. Options are Own, or, Own and Team, or All. Only one radio button may be selected at a time. Choosing one, removes the other.

Can Edit / Reassign Orders is also divided into radio buttons. Options are Own, or Own and Team, or All, or Limited. Only one radio button may be selected at a time.

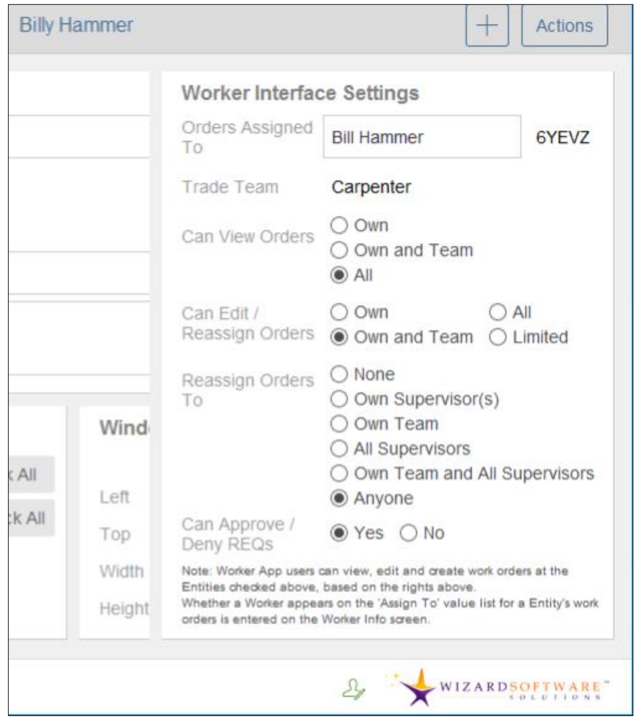


Figure 322 Worker Interface Settings

When Reassign Orders To is selected in the Can Edit / Reassign Orders area, then it is important to choose one of the radio buttons in the Reassign Orders To area. Options include None, Own Supervisors, Own Team, All Supervisors, Own Team an All Supervisors, or Anyone. Only one radio button may be selected.

Can Approve / Deny REQs displays radio buttons for Yes and No. If an REQ is entered, workers with this option can approve the REQ and assign it.

CONTACT INFORMATION

Enter the user Name. Remember that the Name much match the name selected in the Orders Assigned To field in the Worker Interface section. Right-click on the Photo container. Performo displays a menu of options. Easiest option is to paste a previously copied selfie or headshot. Click the In / Out Board Active to display this worker on the In / Out Board section of the Team tab on the Home Screen. See Figure 313 on page # 224.

Be nice when entering comments in the Contact Information section.

Click the green **PROCEED** button. Performo completes the worker setup and displays the User List view.

System User Detail View

The System User Detail view – aka User Detail view displays five sections of data: Account Information, Divisions, Contact Information, Windowing, and Worker Interface Settings.

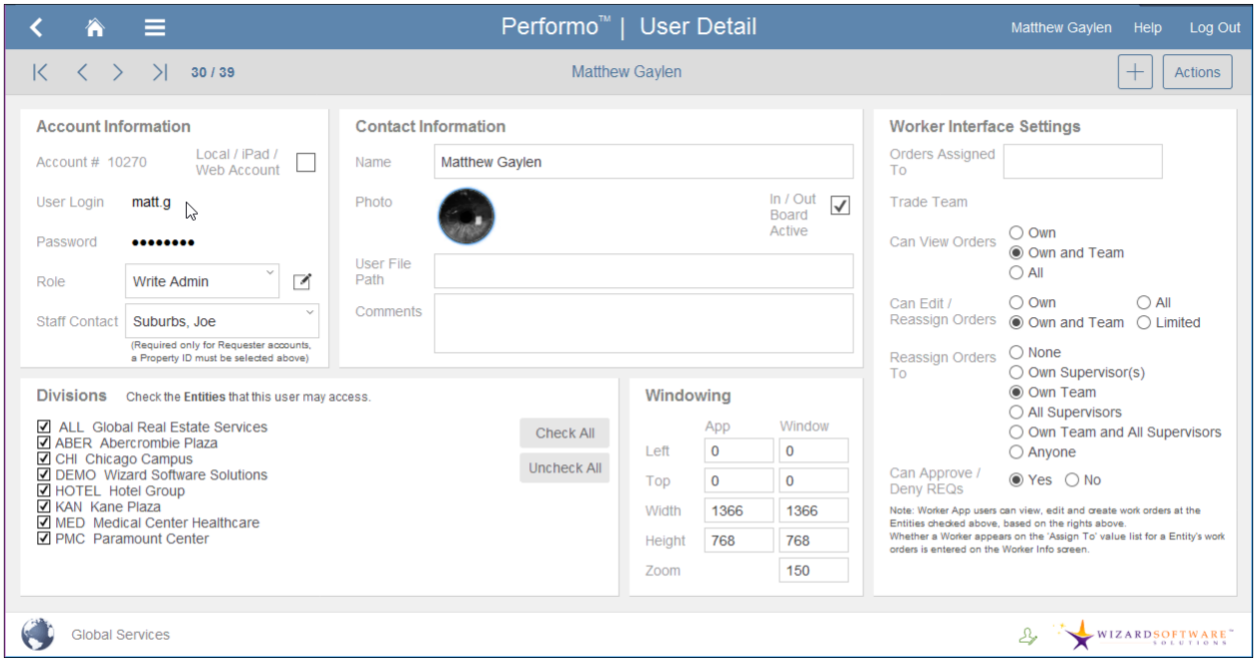


Figure 323 System User Detail View

The Account Information section includes Account #, User Login, Password, the Role value list, and the Staff Contact value list. Click the checkbox for Local / iPad / Web Account. Performo creates an account that does not user Active Directory. The most common use of the Local / iPad / Web Account checkbox is when creating users who access Performo from a device such as an iPhone or iPad, or exclusively via a web browser.

Click the **ROLE SETUP** button next to the Role field. Performo displays the Role Setup data entry window. Role Setup is discussed in the previous section of this user reference guide.

ACTIONS ON THE USER DETAIL VIEW

Click the **ACTIONS** button on the Actions bar on the System User Detail view. Performo displays the Actions value list. Click the **LOGIN AS THIS USER** option. Performo runs the login script and displays the Home screen. The Upper right-hand corner displays the user name.

Click the **GO TO ROLE LIST** option. Performo displays the Role List view. See actions on the system user list view – go to role list on page #225. Click the **DELETE USER** option. Performo displays a message dialog box. Click the **OK** button to confirm. Performo deletes the user permanently. There is no undo.

Creating A New User

Click the **NEW USER** button on the Actions bar of either the User Detail view or the User List view. Performo displays the New User data entry screen.

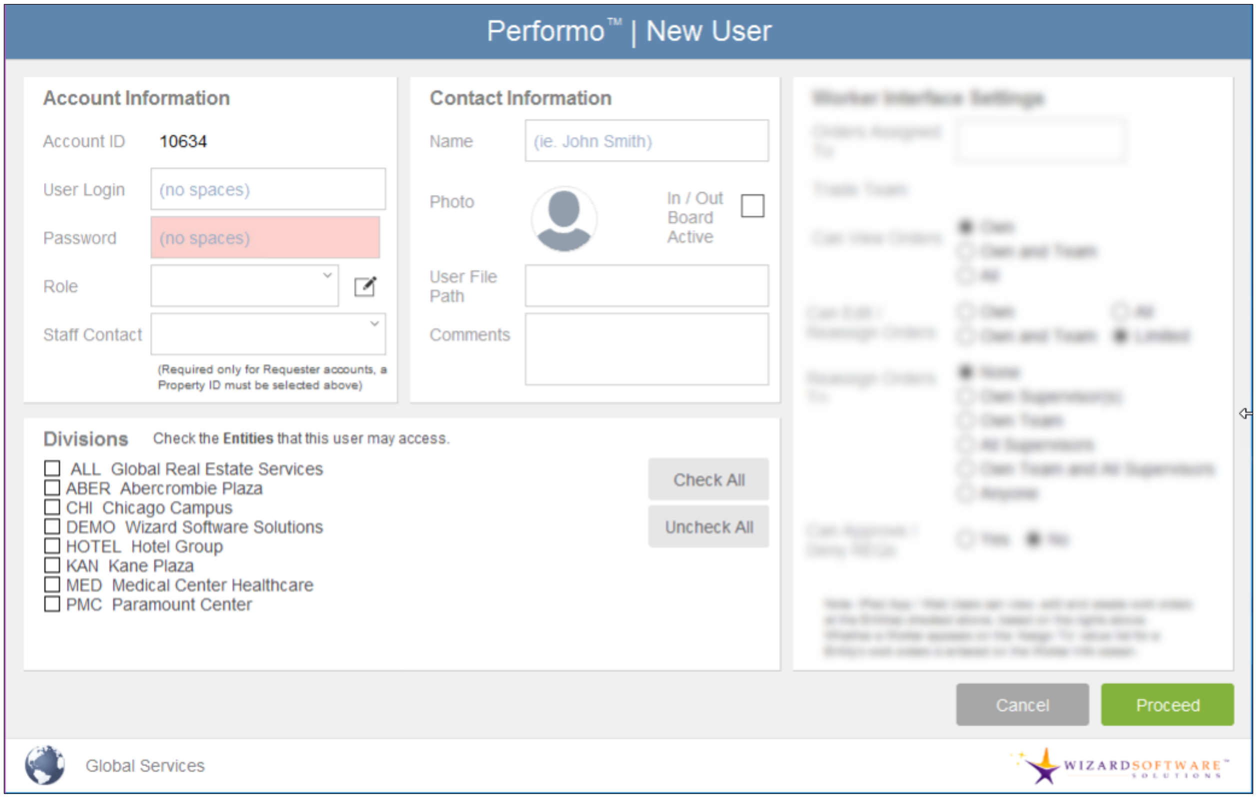


Figure 324 New User Data Entry Screen

The New User data entry screen is divided into four sections. Creating a new worker has been discussed previously in this user reference guide. To set up all other types of users, three sections are important: Account Information, Contact Information, and Divisions.

ACCOUNT INFORMATION SECTION

Performo automatically enters and displays a unique user ID number. Contact the Solution Admin, if this ID number has to match an employee ID number generated by the Human Resources department.

Enter a User Login. The User Login is a user-definable text field. The only limitation is no spaces are allowed in the user login. Also, more than 14 characters in a user login may yield unexpected results in some instances.

ACCOUNT INFORMATION SECTION – USER PASSWORD FIELD

The User Password field is also a user-definable text field. Again, the only limitation is no spaces are allowed in the password field. Contact the **SOLUTION ADMIN** if your company, corporation or institution requires special characters in passwords for facility maintenance software.

Click the **ROLE** field. Performo displays the Role value list. Common Roles include, Read Only, Requester, Worker, Worker FileMaker, Write Admin, and Write User.

The Worker role has been dicussed previously. To create any other type of user, make a selection from the value list.

Refer to role setup on page #227 for details about assigning Can Dos to Roles.

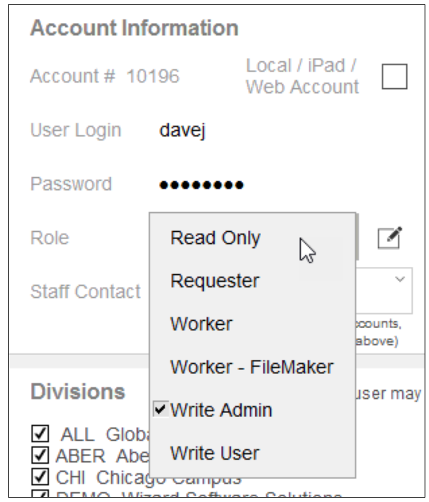


Figure 325 Roles Value List

READ ONLY ROLE – NOTES

The read only role can have View privileges in one or more modules, including Assets, Contacts, Documents, Meetings, Parts, PMs, Procedures, Workers/Vendors, and Work Orders. By creating roles and adding Can Dos to those roles, it is possible to have view only users for specific modules. One user role might only need to look at Work Orders… there might be one user who might only need to look at Assets. Any combination of Can Dos may be added to any role.

Figure 326 Read Only

System Administration

WRITE ADMIN v WRITE USER

In the Role Setup data entry window; choose the **MANAGE SETTINGS** Can Do. Performo displays the System Administration button for all users assigned to that role.

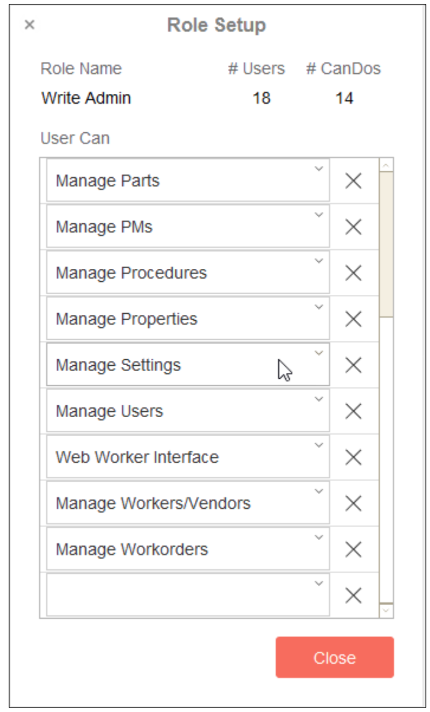


Figure 327 Rose Setup Data Entry Window

What this means is that users of whatever that role is called will see the System Administration button on the Home Screen.

Users with the Manage Settings Can Do selected will see the System Administration button on the Home Screen. In most cases, the Solution Admin will have a role set up with the Manage Settings privilege added.

The Write User Role might have all the same *Manage* Can Dos, except for the *Manage Settings* privilege. The Write User might have access to every screen in every module, but not have access to the settings that affect every other user. The person in charge of work orders might be a Write User. The person in charge of assets might be a Write User. On the other hand, the Solution Admin will have whatever role name has the **MANAGE SETTINGS** privilege.

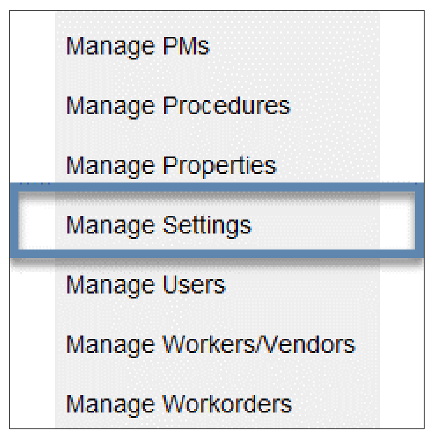


Figure 328 Manage Settings Can Do...

DIVISIONS (AKA ENTITIES)

In the Divisions section, click the checkbox corresponding to the locations where the worker will be assigned work orders. Click the **CHECK ALL** button. Performo checks all the boxes and the user will be able to access all entities. Click the **UNCHECK ALL** button. Performo removes checks from all entities. This is the, “Start over,” option. Besides the All entity, at least one must be checked in order for the user to be able to log in.

Figure 329 New Work Setup - Divisions

CONTACT INFORMATION

Enter the user Name.

Right-click on the Photo container. Performo displays a menu of options. Easiest option is to paste a previously copied selfie or headshot.

Click the In / Out Board Active. Performo displays this worker on the In / Out Board section of the Team tab on the Home Screen. See Figure 313 on page #224.

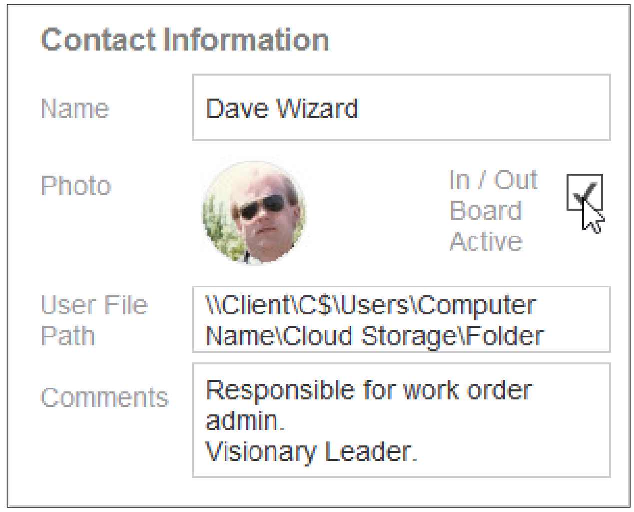


Figure 330 Contact Information

Be nice when entering comments in the Contact Information section.

Click the green **PROCEED** button. Performo completes the worker setup and displays the User List view.

<end>

List of Figures: