



Service Management Software

Service Foundation is the base of the **WorkTech Inc.** service management software system. This application enables citizen service requests, asset/equipment work orders, scheduling, work cost estimating, service standards, email auto-notification, due dates and warnings, multiphase tracking, compliance check lists, auto generation of recurring tasks etc. Bolstered by its extender, this module is also capable of preventive maintenance planning and service standard enforcement.

ID	Date	Equipment	Request	Message	Lab Hrs
PE00132	4/21/2004	1036-93	Service		
PE00133	5/17/2004	1076-90	replace supplied belt		
PE00134	4/07/2004	1050-93	heater NW		
PE00135	6/19/2004	1087-97	service	Lirette, David	
PE00136	5/18/2004	1095-02	service	Lirette, David	
PE00137	5/18/2004	1063-91	service	Lirette, David	
PE00138	4/22/2004	1002-87	repair as per safety inspection	Lirette, David	
PE00139	4/21/2004	1070-89	Flat RIR tire	Lirette, David	
PE00140	4/21/2004	1097-02	service due.	Lirette, David	
PE00141	4/19/2004	1074-93	Service.	Lirette, David	
PE00142	4/16/2004	1092-97	service due.	Lirette, David	
PE00143	4/08/2004	1088-97	Service Due.	Lirette, David	
PE00144	4/07/2004	1117-97	no start	Lirette, David	
PE00145	4/05/2004	1090-97	vehicle quit	Lirette, David	
PE00146	6/08/2004	2080-95	Spring Service	Lirette, David	
PE00147	4/14/2004	1095-02	ABS light	Lirette, David	
PE00148	5/17/2004	1033-87	repair as per safety inspection	Lirette, David	
PE00149	/ / /			Lirette, David	
PE00150	6/03/2004	1030-93	service	Lirette, David	
PE00151	6/07/2004	1093-90	service	Lirette, David	

Easily view and retrieve all work orders assigned to employees, contractors etc. Quickly view work in progress, completed and overdue requests. Perform ad-hoc queries using customized criteria such as: date, name of requestor, date of request etc.

Quickly enter request data using user-defined drop lists and lookup tables. Retrieve customer details from your financial system's master customer list. Automatically notify clients of work completed via email.

Resources | Files | History | Assets | Log

W/O#: W/A0016

Time: 2:50 PM

Request By: Paul Brown & Son

Address: Samnah Court

City/Prov: Email:

Request: Water Shut Off

Details: Shut off water main and inspection of new main on Samnah Court, Ingersoll on Monday, July 21/03. Please keep track of your hours for billing purposes. Thanks.

Notify by: None, Ph., email, Fax

Assignment: Urgent Done Closed Follow Up Req

Serv Type: Water Inspection

Serv Class: 1 Warn Days: 0

Assign To: John Mos Called?

Scheduled: 7/18/2003

Due: 7/21/2003 7:00 AM

Done:

Compl. By:

Action:

Action Det:

*** OVERDUE ***

Est Meth:

OK Cancel Help

Easily access the Service Management console from Work Manager Foundation. Create unlimited work order series by department or request type. Generate reports to compare work efficiency from period to period.

Service Manager Theme

General | Routines

Setup

Contacts (if using)

Drop Lists

Categories

Sub Categories

Service Classes

Service Types

Assign To

Work Order Series

WD Scheduling

Setup...

Resources

Kits

General PM Tasks

Equipment

General

Utility Change

Reports

Summary

Asset

Equipment

General

Utility Change

Resource Planning

Resource Plan - List

Resource Plan - Week

Resource Plan - Daily

Close

SERVICE MANAGER FOUNDATION

- Create various work order series for multiple departments or request types
- Recover the cost of billable work orders and apply overhead percentages
- Create user-defined fields and required compliance items
- Automatically alert requestors of work completion or progress
- Estimate work order completion costs
- Create resource requirements schedules for work order completion
- Create employee workload forecasts and schedule
- Create parent-child relationships between service requests and work orders



Service Manager Foundation

Software Features

Integration

When used in conjunction with Work Manager Foundation and Asset manager Foundation, Service Manager Foundation enables the processing of Asset work orders for maintenance and Job, Activity and Object codes for financial costing and reporting.

Email Notification

Notify via email assignees to whom a new service request or work order has been assigned. Assignees can be an individual or a group of email recipients. Likewise, notify the requestor once the requested work has been completed or to request additional instructions and/or information on the order.

Multiple Work Order Series

Create multiple work order series each with specific assignees lists, user-defined fields, requestors and numbering schemes. A work order series can be assigned to a department or reserved for a certain type of requests e.g. Water Services

Asset and Equipment Linkage

Link a vehicle or other equipment, or a fixed asset such as a road section to a work order. On each asset or equipment, view all completed and outstanding work orders and glean valuable maintenance history or inefficiencies.

Citizen Service Requests

Respond efficiently to citizen service requests by assigning issues to appropriate parties. Requests include: the nature of the issue, the location of the issue and of the citizen, the severity and priority, expected scheduled date and mandatory due date etc.

Multi-phase Work Orders

For large multi-step work orders, create parent and child relationships between work orders. As child work orders or service requests are completed under an assigned master work order, the master work order progresses to ultimate completion.

Resource Scheduling

Book resources to accomplish a task on a work order or service requests. Once the work order is completed, the resources can be released and rescheduled to accomplish another task. View and print all resource required to complete a work order and verify availability online.

Work Order Cost Estimate

Perform preliminary cost estimates using resource costs, activity costs or manual entry. As costs are posted against the work order (in Work Manager Foundation), compare the estimate to the actual costs posted.

Standard Activity Checklist

For routine tasks, create standard checklists of 'to do' items, which can be printed and given to the recipient of the work order or service request. As items on the list are completed, the worker can indicate completion in checkbox.

User Defined Fields

Create user defined fields by work order series to capture data pertinent to the type of request being issued. User defined fields can be entered using straight entry, drop list or lookup tables and can also be marked as required fields.

Ad-Hoc Queries

Perform ad-hoc queries on any number of criteria on individual work orders or lists within series. Combine queries to drill down to select entries and glean desired information e.g. all requests created by John B for location Ward 1 during week 34.

Billable Work Order

Track all costs posted against a work order and recuperate these costs by billing a predefined customer. Add a markup percentage to the base costs or assign billable rated to items such as employee labour, stock, equipment etc...