

# VisionFM Enterprise release 12

## Product Brief

Available: August 2009

### Product Description

VisionFM is a unique solution for the Facilities Management industry. Its site licensing and competitive pricing make it an attractive alternative to the more expensive products on the market, while its focus on the entire facility operation provides a unique perspective on building operations and performance. This perspective comes from having a single system support all three disciplines of Facilities Management; CAFM, CMMS and FIMS.

**CAFM** Computer Aided Facilities Management  
The management of space, employees and assets.

**CMMS** Computerized Maintenance Management System  
The management of on-demand work, preventative maintenance, labor and parts.

**FIMS** Financial Information Management System  
The management of financial information and long-term expenses such as leases, projects and capital renewal.



The previous release of VisionFM (version 11) focused on “building on your valuable facilities information” by adding custodial maintenance, surveys and capital planning.

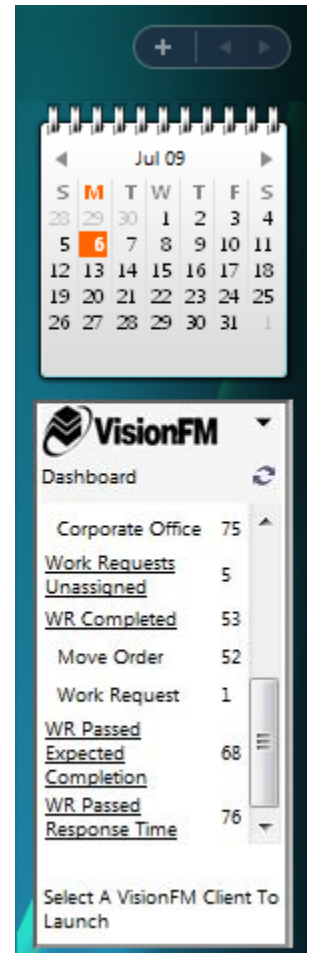
With release 12 we had two major objectives: to improve your access to information and to simplify the setup of assets including their maintenance schedule and replacement. We hope you will find that these enhancements make VisionFM even easier to use than before.

### Dashboards

In previous releases of VisionFM, the dashboards were written as visual basic scripts. Version 12 allows the administrator to simply create queries and immediately assign them to dashboards. Dashboards can even show totals and sub-totals from queries, providing users with an additional level of detail without any extra effort. In the example below, the screen shot shows *WR completed* with subtotals for *Move Orders* and *Work Requests*. For even more detail, the user can click on a dashboard title to launch the underlying query.

Dashboard		
<b>PM WO Unassigned to Employees</b>		16
<b>PMs Overdue to be Created</b>		1
<b>Vacant Rooms</b>		74
Corporate Office		74
<b>Work Requests Unassigned</b>		9
<b>WR Completed</b>		53
Move Order		52
Work Request		1
<b>WR Passed Expected Completion</b>		57
<b>WR Passed Response Time</b>		5

Another powerful new feature of VisionFM’s dashboard is its ability to run in your Windows side bar, allowing users to access current information without having to enter the application.

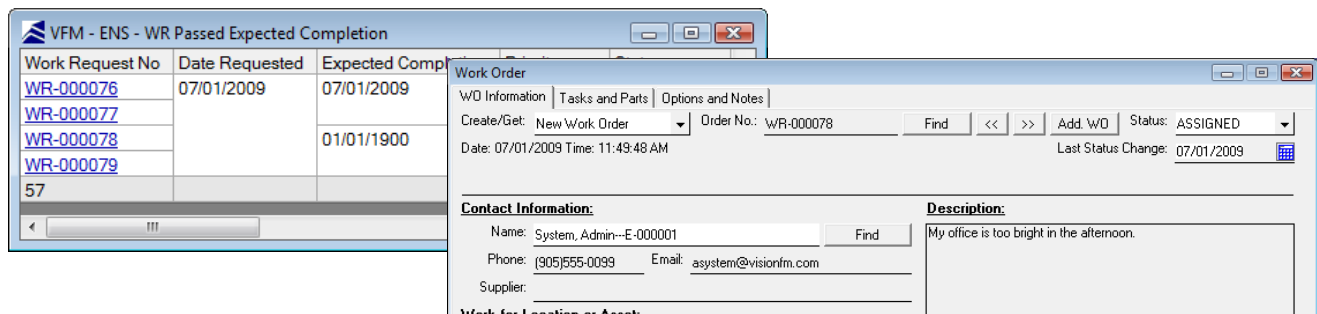


## Hyperlinks in Queries

Searching for information in VisionFM has become a lot easier with the addition of hyperlinks in queries. Simply click on information in a query and launch a form or another query. Imagine having a query that shows account totals and then being able to click on an account number to display another spreadsheet showing the detailed spending in that account. Or, you have a list of completed work orders and you simply click on the order number to open the work order and review the work.

Setting up the hyperlinks is easy. While designing a query, simply select the form or query that you would like to run from each field. Adding a link will display the data in that column as a hyperlink (blue underline). VisionFM will then automatically pass the piece of data that the user clicked on, to the form or query that is opened.

The result is the ability to use queries as a starting point and then drill down to additional information. Easy, versatile and powerful.

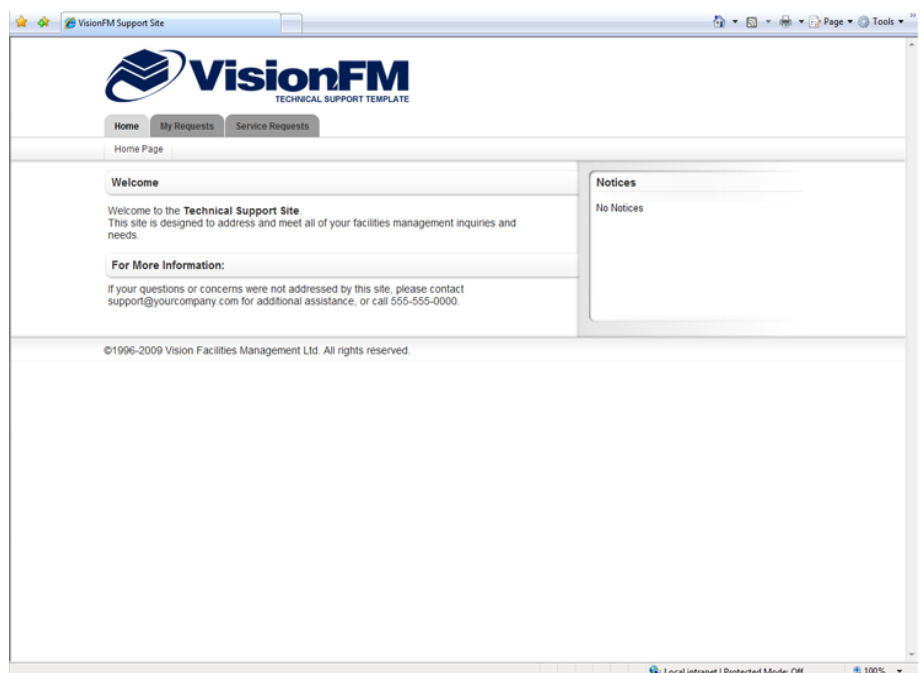


## Service Requests

VisionFM's web work request form has been greatly expanded into a complete facilities department website. The new website allows maintenance managers to present information about their department's services, including the posting of service notices and instructions. Each notice includes a start and end date, so that the website only shows information relevant for the current date.

In addition to work requests, users can now submit move requests and project requests online. Each request features customizable option fields and templates, allowing maintenance managers to customize the fields in the service request form.

The Survey form has also been added to the website and features customizable templates, providing a wide range of possibilities for input from staff, including evaluation surveys, post-service surveys and incident reports.

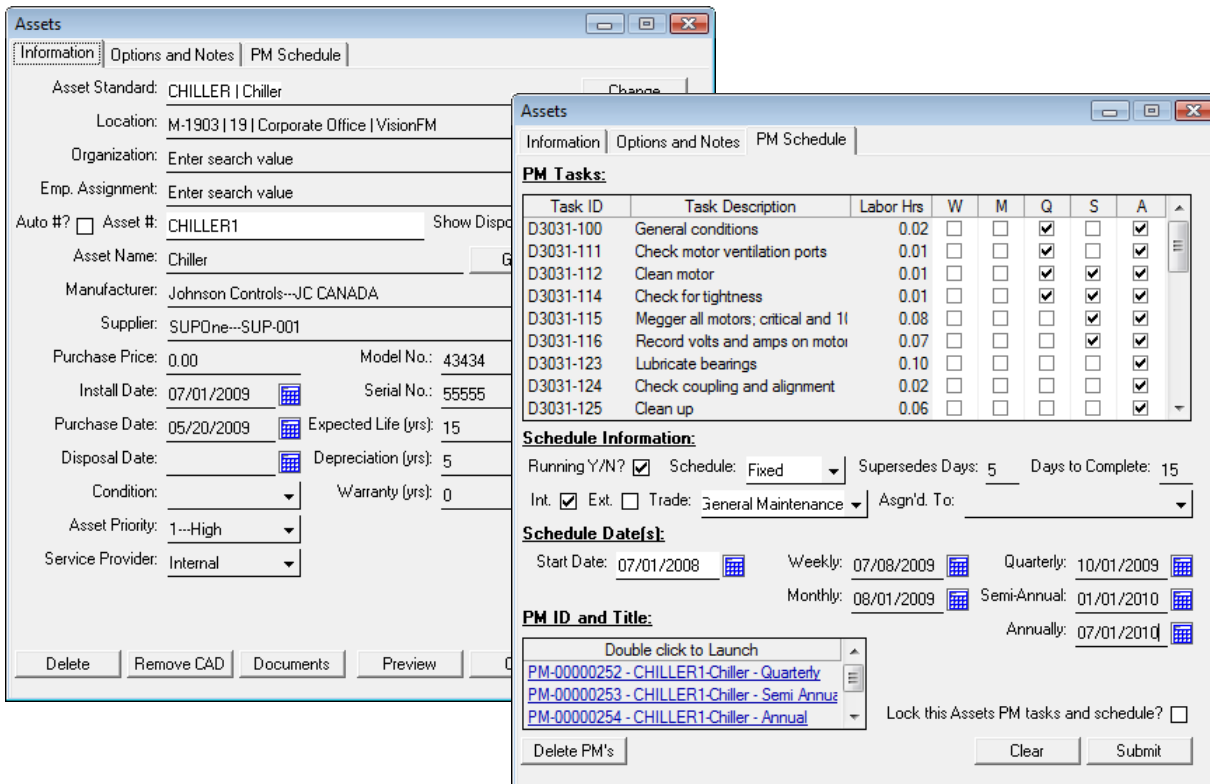


## Easier Setup of Scheduled Maintenance

In version 11, maintenance schedules were set up for each building system. This made it easy to create maintenance schedules quickly but cumbersome to set up schedules for individual assets. VisionFM version 12 has moved scheduled maintenance to the asset level, making it much easier to understand which schedules are active and how to modify them. Maintenance Managers can now set their default maintenance schedule preferences for each asset standard and automatically have them applied to new assets as they are added.

The Asset form now includes a PM Schedule tab which shows the tasks and the next weekly, monthly, quarterly, semi-annual and annual maintenance schedules. While creating or editing an asset, the user can easily accept the default schedules or modify the maintenance schedules for that particular asset.

Managing scheduled work orders and determining when they are generated has also become easier with a new capability to group assets and align their maintenance schedules. Assets can be grouped by location, asset standard or any other classification and their scheduled maintenance will be generated on the same days.



**Assets**

Information | Options and Notes | PM Schedule

Asset Standard: CHILLER | Chiller

Location: M-1903 | 19 | Corporate Office | VisionFM

Organization: Enter search value

Emp. Assignment: Enter search value

Auto #?  Asset #: CHILLER1 Show Dispo

Asset Name: Chiller

Manufacturer: Johnson Controls--JC CANADA

Supplier: SUPOne--SUP-001

Purchase Price: 0.00 Model No.: 43434

Install Date: 07/01/2009 Serial No.: 55555

Purchase Date: 05/20/2009 Expected Life (yrs): 15

Disposal Date: Depreciation (yrs): 5

Condition: Warranty (yrs): 0

Asset Priority: 1--High

Service Provider: Internal

Buttons: Delete Remove CAD Documents Preview

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**Assets**

Information | Options and Notes | PM Schedule

**PM Tasks:**

Task ID	Task Description	Labor Hrs	W	M	Q	S	A
D3031-100	General conditions	0.02	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D3031-111	Check motor ventilation ports	0.01	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D3031-112	Clean motor	0.01	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D3031-114	Check for tightness	0.01	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D3031-115	Megger all motors; critical and 11	0.08	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D3031-116	Record volts and amps on motor	0.07	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D3031-123	Lubricate bearings	0.10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D3031-124	Check coupling and alignment	0.02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D3031-125	Clean up	0.06	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Schedule Information:**

Running Y/N?  Schedule: Fixed Supersedes Days: 5 Days to Complete: 15

Int.  Ext.  Trade: General Maintenance Asgn'd. To:

**Schedule Date(s):**

Start Date: 07/01/2008 Weekly: 07/08/2009 Quarterly: 10/01/2009

Monthly: 08/01/2009 Semi-Annual: 01/01/2010 Annually: 07/01/2010

**PM ID and Title:**

Double click to Launch

- PM-00000252 - CHILLER1-Chiller - Quarterly
- PM-00000253 - CHILLER1-Chiller - Semi Annu
- PM-00000254 - CHILLER1-Chiller - Annual

Lock this Assets PM tasks and schedule?

Buttons: Delete PM's Clear Submit

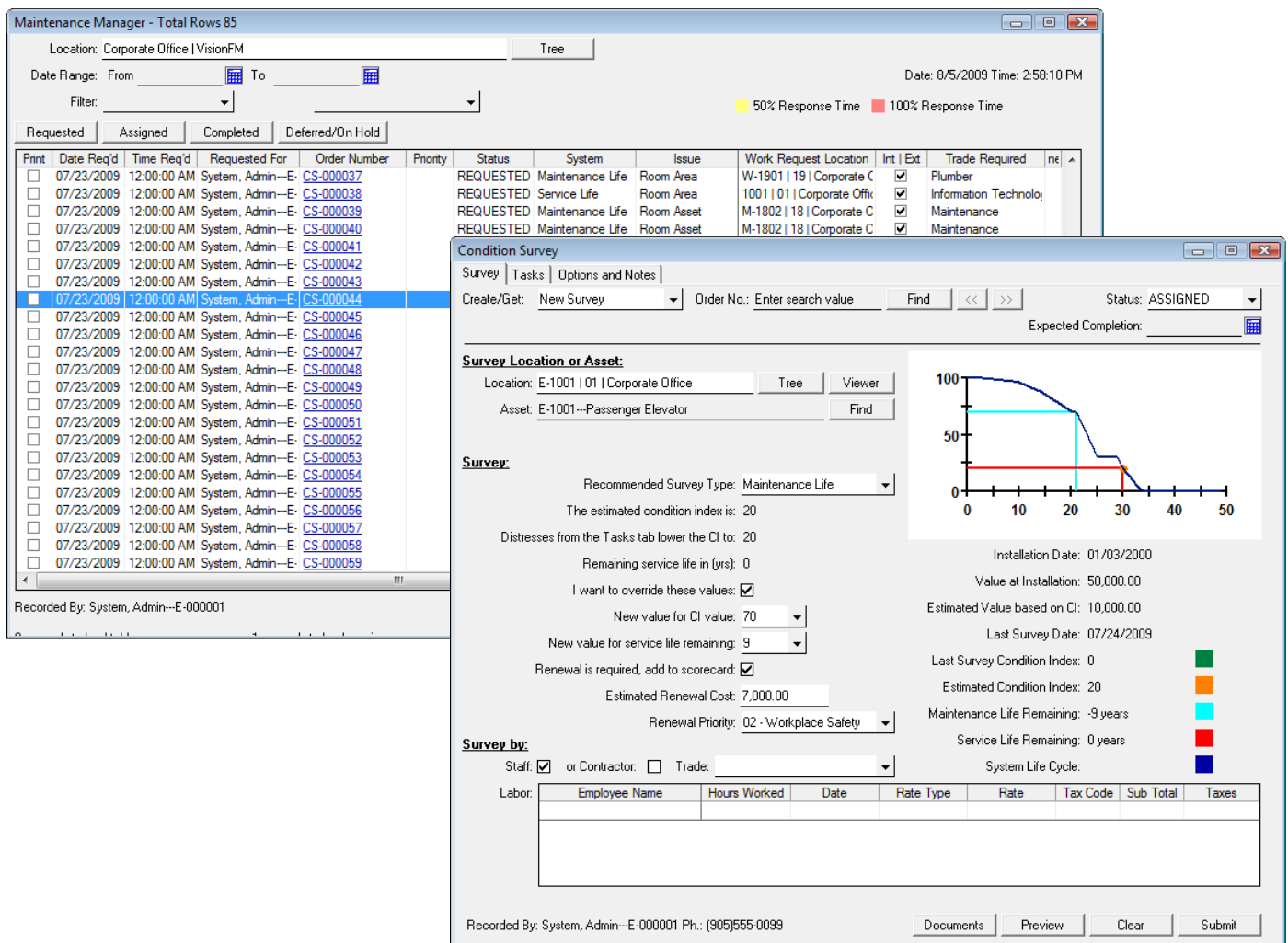
## Capital Planning – Renewal of Space and Assets

The Capital Planning module allows users to define asset life cycles. The module works with your asset information including installation date and purchase price to estimate the replacement date and cost of assets.

With VisionFM version 12 we have expanded the capital plan to include the renewal of areas. Each type of area (ie. roof section, parking lot, washroom, etc) can be defined with a life cycle. For example, if you plan to replace your washrooms every five years and your roof every fifteen years, you can make those area types part of our capital plan and survey schedule. Each time you look at your capital plan, the system analyses your space information, so any change to your room sizes or functions are automatically reflected in the plan.

Defining capital assets and areas has also been made easier with the new Capital Assets and Capital Facilities forms. These straight forward forms allow the user to select which assets and areas to include in their capital plan and to update installation year and cost information.

Conducting condition surveys has been made much easier. A single survey form is now used to conduct surveys at all three stages of an asset's life; maintenance life, service life and past service life. The forms survey tasks and responses adjust to provide more intensive surveys as an asset ages. This helps to focus your survey efforts on older assets where renewal efforts are more likely to be required.



**Additional new features include:**
**Enhancements to the Project Module**

- The new Service Request form can be used to submit project requests.
- Project tasks and approvals have been merged into one grid, making it easier to relate specific tasks to individuals.
- Work orders, move orders and purchase orders can now be associated to a specific project task.
- Project phases can now contain an unlimited number of sub-levels.
- Project tasks can be assigned dependencies with other phases, with changes to a date in one phase affecting other phases.
- Project templates will now record default “days to complete” for each phase.
- The Project form can now contain an unlimited number of user definable option fields.
- An unlimited number of notes can now be added to a project.
- A new project monitoring report allows users to view projects by department, manager or region.

**Tasks and Timeline:**

Row	Dep	Task Description	Start Date	Days	End Date
1		Feasibility Study	8/5/2009	7	08/12/2009
2	1	Concept	08/12/2009	7	08/19/2009
3	2	Preliminary Plans	08/19/2009	-14	8/5/2009
4	3	Plans approved for p	8/5/2009	3	08/08/2009
5	4	Permits	08/08/2009	4	08/12/2009
6	5	Demolition required	08/12/2009	14	08/26/2009
7	6	Construction	08/26/2009	30	09/25/2009
8	7	Fixture date	09/25/2009	14	10/09/2009
9	8	Completion date	10/09/2009	7	10/16/2009
10	9	Opening date	10/16/2009	1	10/17/2009

Add project tasks with start and end dates, and link dates with dependencies.

**Project Phases:**

ID	Phase
01.0	Concept
01.1	Feasibility Study
01.1A	Initial Feasibility Study
01.1B	Final Feasibility Study
01.2	Design
01.2A	Preliminary Design
01.2B	Working Drawings
01.2C	Specifications
02.0	Construction
02.1	Demolition
02.1A	Demolish Existing
02.1B	Make Good
02.2	External Construction
02.2A	External Services

Create a phase hierarchy up to eight levels, each with a timeline and funding

**Enhancements to the Asset Module**

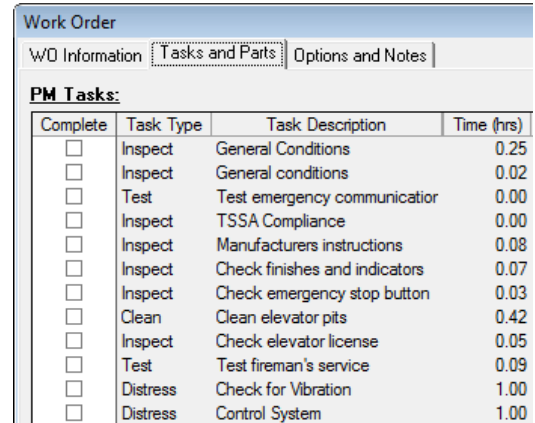
- Assets can now have an unlimited number of option fields, organized by asset standard.
- A new Asset Setup form makes it easy to organize and select option fields.
- While editing an asset, the user can now adjust the asset’s scheduled maintenance.
- Copying an asset copies the maintenance schedule as well.
- Each asset can have an unlimited number of notes.
- The asset notes include comments from the asset’s maintenance history.
- Contracts and policies can now be assigned to groups of assets from different building systems and multiple buildings.

Assets	
Information	Options and Notes
PM Schedule	
Options:	
Field Name	
Area Served	Note
Automatic/Manual	Automatic
Capacity Input	Number
Capacity Output	Number
Compressor Motor Make	Note
Compressor Motor Model	Note
Control Type	Note
Fan Motor Make	Note

Assets can now include an unlimited number of user definable option fields.

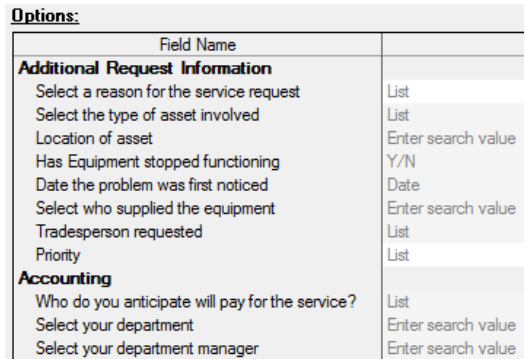
### Enhancements to Maintenance

- User definable option fields have been added to work orders.
- A new web based service request form allows the administrator to design service request templates with mandatory and optional fields.
- When assigning a work order to an asset, the form displays any contracts or policies associated to the asset.
- Add an unlimited number of notes to a work order.
- The work order notes field displays notes from the requestor, manager and tradesperson. It also displays notes relating to an asset assigned to the work order.
- The work order form now displays PM tasks, allowing maintenance staff to record PM tasks completed while performing an on-demand service request.
- Information collected in a work order can now be expanded using an unlimited number of option fields
- A new work order status of “differed” can be used to organize work that needs to be done at a later date.



Complete	Task Type	Task Description	Time (hrs)
<input type="checkbox"/>	Inspect	General Conditions	0.25
<input type="checkbox"/>	Inspect	General conditions	0.02
<input type="checkbox"/>	Test	Test emergency communicator	0.00
<input type="checkbox"/>	Inspect	TSSA Compliance	0.00
<input type="checkbox"/>	Inspect	Manufacturers instructions	0.08
<input type="checkbox"/>	Inspect	Check finishes and indicators	0.07
<input type="checkbox"/>	Inspect	Check emergency stop button	0.03
<input type="checkbox"/>	Clean	Clean elevator pits	0.42
<input type="checkbox"/>	Inspect	Check elevator license	0.05
<input type="checkbox"/>	Test	Test fireman's service	0.09
<input type="checkbox"/>	Distress	Check for Vibration	1.00
<input type="checkbox"/>	Distress	Control System	1.00

On-demand work orders now include scheduled maintenance tasks.

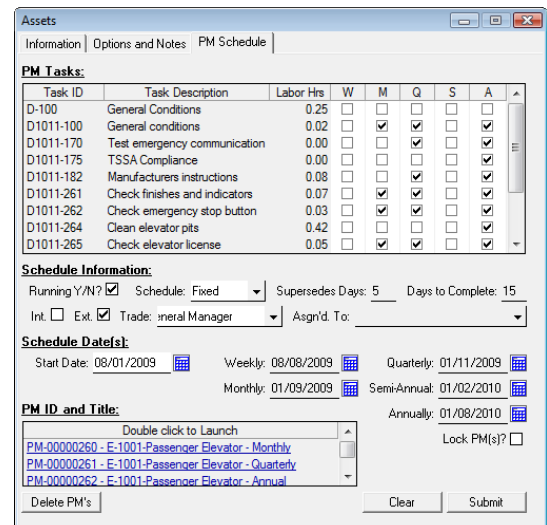


Field Name	
<b>Additional Request Information</b>	
Select a reason for the service request	List
Select the type of asset involved	List
Location of asset	Enter search value
Has Equipment stopped functioning	Y/N
Date the problem was first noticed	Date
Select who supplied the equipment	Enter search value
Tradesperson requested	List
Priority	List
<b>Accounting</b>	
Who do you anticipate will pay for the service?	List
Select your department	Enter search value
Select your department manager	Enter search value

User definable option fields can be added to work orders.

### Enhancements to the Preventative Maintenance Module

- Each PM task now includes an optional pass/fail checkbox allowing staff to indicate if the task was completed successfully.
- Automatic work requests can now be generated for each PM task that was flagged as “failed”.
- Each PM task can now be used to record multiple meter readings.
- Instructions for each PM task are no longer limited to 2000 characters. Each PM task can include an unlimited amount of instructions.
- Instructions for each PM task now print on the work order.
- Create a default list of PM tasks and then copy them to specific building systems.
- PM schedules are now at the asset level, making it easier to adjust individual asset schedules.



Task ID	Task Description	Labor Hrs	W	M	Q	S	A
D-100	General Conditions	0.25	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D1011-100	General conditions	0.02	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D1011-170	Test emergency communication	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D1011-175	TSSA Compliance	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D1011-182	Manufacturers instructions	0.08	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D1011-261	Check finishes and indicators	0.07	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D1011-262	Check emergency stop button	0.03	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D1011-264	Clean elevator pits	0.42	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
D1011-265	Check elevator license	0.05	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Schedule Information:**  
 Running Y/N?  Schedule: Fixed Supersedes Days: 5 Days to Complete: 15  
 Int.  Ext.  Trade: General Manager Asgn'd To: \_\_\_\_\_

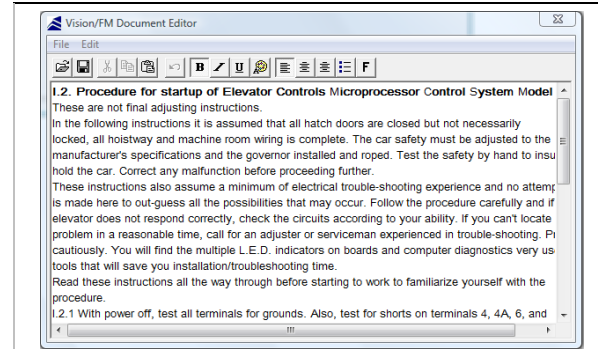
**Schedule Dates:**  
 Start Date: 08/01/2009 Weekly: 08/08/2009 Quarterly: 01/11/2009  
 Monthly: 01/09/2009 Semi-Annual: 01/02/2010  
 Annually: 01/08/2010

**PM ID and Title:**  
 Double click to Launch  
 PM-00000260 - E-1001-Passenger Elevator - Monthly  
 PM-00000261 - E-1001-Passenger Elevator - Quarterly  
 PM-00000262 - E-1001-Passenger Elevator - Annual  
 Lock PM(s)?

Delete PM's Clear Submit

Quickly adjust maintenance schedules for individual assets.

- Group assets together to align their PM schedules.
- The PM Close form has been merged with the Work Order form, providing maintenance staff with a common interface for recording on-demand and scheduled maintenance.
- An unlimited number of notes can be added to a PM work order.
- Scheduled maintenance can now be set up for properties as well as buildings.



The VisionFM Text Editor allows for each PM task to include pages of instructions.

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## Additional Enhancements

- Leasing                      A new lease renewal form allows users to enter proposed leases and compare their costs to existing leases.
- Move Management        The new web page service request form can be used to submit move requests.
- Move Management        Users can now click in drawings to select move from and to locations.
- AutoCAD                    VisionFM now supports AutoCAD and AutoCAD LT 2010.
- Space                        A default room standard can be set, allowing rooms to be added without selecting a room standard.
- Queries                     Dashboard queries can contain VB Script to help restrict data and identify the current user. This results in easier administration since dashboards will only show information relevant to the current user.
- Web Interface              Users can now run multiple queries at the same time in the web interface.