



(eVAM) Full Feature Set

2010

---

## Table of Contents

<b>Section 1: Overview.....</b>	<b>3</b>
<b>Section 2: General Features .....</b>	<b>3</b>
<b>Section 3: Assets Features .....</b>	<b>5</b>
<b>Section 4: Work Order Features .....</b>	<b>6</b>
<b>Section 5: Tasks (Preventative Maintenance) Features.....</b>	<b>7</b>
<b>Section 6: Actions Items Features .....</b>	<b>8</b>
<b>Section 7: Projects Features.....</b>	<b>9</b>
<b>Section 8: Parts Features .....</b>	<b>9</b>
<b>Section 9: Labor Features.....</b>	<b>10</b>
<b>Section 10: Purchase Requests Features.....</b>	<b>11</b>

## Section 1: Overview

eVisioning Asset Management (eVAM) is a web-based, enterprise-wide asset information and life-cycle management system designed to provide economical and convenient access to critical information regarding your valuable assets, as well as to manage workflow to support enterprise procurement, operation, maintenance, retirement and replacement of your assets.

## Section 2: General Features

GENERAL FEATURES	
<b>Web-Browser Based</b>	Accessible from most popular web browsers (Microsoft Internet Explorer, Firefox and Safari). User interface is intuitive and easy to use.
<b>24/7 Access</b>	eVAM is accessible 24/7 to authorized users. User access is based on a user's Role (Access Privilege), association with specific Properties/Projects, as well as explicit rights granted to Financial Data and/or Sensitive Documents.
<b>Dashboard Tabs</b>	Dashboard provides an at-a-glance view of key system information (Action Items, Work Orders, Purchase Requests, Warranties and more). The Dashboard offers single-click access to the most used functions.
<b>Dashboard Alerts</b>	The Dashboard only includes those items that are within a user specified threshold. Alerts are also color-coded to highlight activities that need special attention.
<b>Dashboard is Flexible</b>	Users can show or hide Properties and/or Projects. Users control when Alerts show up on the Dashboard by setting their individual "Reminder Range" preference. Users also have control how the navigation menu is displayed.
<b>Users</b>	Users perform the day-to-day operations within eVAM. Records are maintained for each user and include contact information, rates, certifications and training status. User records can be cloned to speed creation of similar users.
<b>On-screen Report Development</b>	Applying our Search, Sort and Filtering features can customize an instant on-screen view. The data can then be exported to spreadsheet for reporting, analysis or import to other systems.

GENERAL FEATURES (con't)	
<b>Integrated Document Management</b>	Documents can be linked to Action Items, Work Orders, Labor Records, and Purchase Requests— no more looking for key documents. Documents can be any electronic media that your browser can display that are stored with eVAM or they can be hyperlinks to intranet or Internet resources. Documents that are flagged “Sensitive” are available only to users with explicit access to those documents.
<b>Roll-Over Views</b>	Mouse roll-over information windows provide instant information, status or quick summaries without clicking through.
<b>Integrated E-mail</b>	Action items, work orders, and purchase request can be transmitted via email to improve team communication.
<b>Asset Labeling</b>	Asset labels can be generated for assets, parts, and part lots, which include human readable information as well as Code128 barcodes.
<b>Auditable History</b>	A complete history is captured on all action items, work orders, and asset records. In addition, an entire assignment history is kept for each Asset.
<b>Cloning</b>	Use of cloning allows quick creation of similar assets, parts, action items, users, work orders, purchase requests, and tasks.
<b>Companies</b>	Maintain a database of all companies that you deal with and flag the record as Manufacturer, Supplier, or Customer (mini-CRM). Companies flagged as manufacturers or Suppliers appear in the corresponding drop-down lists throughout the system. This method eliminates duplicate entries for the same company and assists with maintaining approved list of suppliers to meet auditing standards.
<b>Consolidated Bill Of Material</b>	Allows BOM to be combined with multipliers to generate a consolidated (duplicates parts consolidated in one line) and displays the available parts alongside the CBOM qty so the user can do what if analysis on CBOM cost as well as checks on availability of parts in inventory.
<b>Passwords</b>	System allows user to change his/her password. System can email a password to a user's email on record eliminating calls to the admin. Admin can always change a user password.

GENERAL FEATURES (con't)	
<b>Reports</b>	Various reports are available and they can be filtered. All transactions (ones with costs) have reports that can be exported or provided to accounting.
<b>Timesheet</b>	Allows capturing of non-work related time such as vacation and sick leave and provides reports related to them.

### Section 3: Assets Features

ASSETS	
<b>Asset Explorer</b>	View asset hierarchy; assets assigned to properties and parent child relationships.
<b>Asset Lifecycle</b>	Full lifecycle supported – assets maybe in planning, operational, or in-maintenance. Inactive assets can be moved to logical inactive placeholder. Assets reserved for use on a work order are flagged as unavailable until the Work Order is closed or the Asset is released.
<b>Audit Trails</b>	Track changes in parent-child relationships, Work Order history including maintenance costs. Complete Action Item activity is captured and available for analysis.
<b>Asset Groups</b>	An Asset can be associated with multiple asset groups. Asset Groups allows filtering assets based on selected group (such as leased, owned, customer, hardware, software, etc.). Work can be initiated from this view.
<b>Asset Financials</b>	Keep records of install cost, replacement cost, salvage value, disposal fees, install dates, useful life, and Lease information for your Assets.
<b>Asset Meters</b>	Set up meters – hours, miles, number of cycles, etc. to support maintenance tracking, warranty management as well as to use in planning and triggering preventative maintenance (Tasks). An asset can have multiple meters.
<b>Assignment History</b>	Complete history of parent-child relationships of Asset throughout its life; especially useful for vehicles or portable equipment.
<b>Bill of Materials</b>	Identify the components and prices for building up a replacement Asset. Useful for Assets that a customer typically manufactures or as a listing of parts typically required for Asset service and repair.

ASSETS (con't)	
<b>Child Assets</b>	Supports multiple layers Grandparent -Parent-Child relationships. Hierarchy displayed on the asset tree called Asset Explorer View.
<b>History</b>	A complete record of work performed on the Asset along with associated costs.
<b>Print Label</b>	Asset bar code labels support easy and unique identifier – ensure work is being performed on properly identified Assets in the field
<b>Warranties</b>	Keep track of warranty information on Assets. An asset can have multiple warranties. Warranty alerts show up on the Dashboard.
<b>Location</b>	Global Positioning Coordinates can identify last reported location of assets. Overhead satellite /map shows the last reported Asset location. Location can be updated with a simple drag-and-drop interface. Optionally a customer custom Grid system can be used for location tracking.
<b>Documents</b>	Attach useful documents: operations and maintenance manuals, photos, voice records, video as needed.

#### Section 4: Work Order Features

WORK ORDERS	
<b>Maintenance Management</b>	Work Orders are the “Muscle” that allows you to complete your scheduled and unscheduled maintenance operations.
<b>Blank Work Order Form</b>	Option for user to print and hand write work orders for later entry into eVAM.
<b>Rapid Work Update</b>	Ideal for rapid end of day operator Work Order update for Labor and Parts.
<b>Labor</b>	Ability to assign labor to work and estimated number of hours.
<b>Parts</b>	Assign expected parts to complete work - this reserves the parts for this purpose until the work order is closed upon which the actual quantity is deducted from inventory and the unused quantity is returned to the part count (inventory).

<b>WORK ORDERS (con't)</b>	
<b>Other Costs</b>	A means to record other costs, such as outside services, travel, petty cash and/or leased equipment that is needed to complete Work Orders.
<b>Special Flags</b>	Flag work for: Shut Down of Asset; Lockout/Tagout of Asset; Warranty, or Safety.
<b>Reserved Assets</b>	Allow for reserving assets (i.e. tools, forklifts or other shared Assets) for use in performing the work and capturing charges for using this Asset on the Work Order.
<b>Inspections</b>	Ability to enumerate specific steps to take for a Work Order. The Work Order cannot be closed until these inspections are complete.
<b>Documents</b>	Link any document that provides detailed instructions, drawings, photos, etc to aid in the completion of the Work Order.
<b>History</b>	Work orders history is maintained where multiple versions are saved and the fields that changed from the previous version are highlighted in red.
<b>Send Email</b>	All Work Orders may be viewed on screen, printed (.pdf) or sent via email.

## Section 5: Tasks (Preventative Maintenance) Features

<b>TASKS— PREVENTATIVE MAINTENANCE</b>	
<b>Tasks</b>	Tasks provide a way to plan multiple work orders for future dates based on periodic time or based on a selected meter for the asset. For example, a task can be created to perform oil change for a vehicle every 3 months or every 3000 miles or both.
<b>Task Recurrence</b>	Tasks are used to launch work orders based calendar and/or meter.
<b>Task Occurrence</b>	Each Task Occurrence may be triggered by date or meter reading (odometer reading, number of uses, hours of operation, etc.). Each occurrence of the task is then (at manager's discretion) converted to a work order. Occurrences that are due are also displayed on the dashboard. An occurrence can be converted to a Work Order in as little as 2 clicks.

<b>TASKS— PREVENTATIVE MAINTENANCE (con't)</b>	
<b>Labor</b>	Assign expected labor type and estimated hours that will then be populated into the work order; manager has the option to override at the time the work order is generated.
<b>Parts</b>	Assign expected parts and parts costs that will then be populated into the work order at the time of creation.
<b>Reserved Assets</b>	Allow for reserving assets (i.e. tools, forklift or other shared Assets) for use in performing the work and capturing charges for using this Asset on the Work Order.
<b>Documents</b>	Documentation associated with a Task is carried forward when the Work Order is created.

## Section 6: Actions Items Features

<b>ACTION ITEMS</b>	
<b>Actions Items</b>	Action Items are the place to record issues that arise in the course of day to day operations; customers, operators, managers, anyone with access may identify an issue that should be addressed.
<b>Assignment</b>	Actions can be assigned and then reassigned - a history is maintained on changes – and email to both the originator and assignee and any other optional emails keeps everyone informed.
<b>Due Dates</b>	Responders to actions are given due dates.
<b>Priority</b>	Customizable to the user – but High, Low, and Emergency are candidate action item priority levels.
<b>Link to Work Orders</b>	Actions may be reviewed and discussed for some time before work is requested; one or many work orders may be generated and linked to the action item (issue) that caused the work to be authorized.
<b>Documents</b>	Documentation (photos, manuals, video, drawings, etc.) associated with the action item may be tied to the action item. This is a useful record of an issue or incident for future reference.
<b>Assets with Actions</b>	Asset explorer view showing hierarchy of assets that also identifies those with an action item that remains active.

## Section 7: Projects Features

PROJECTS	
<b>Projects Development</b>	Projects are a way to collect all work orders, actions, and purchasing costs for a target project – can be a renovation project, a customer specific project or other group work effort.
<b>Project Cost Tracking</b>	Sum total of work orders and purchase requests give roll up of project cost against project budget.
<b>Link to Microsoft Project*</b>	Tasks linked from Microsoft Project support work planning and rollup match to project plan.
<b>Documents</b>	Maintains project-specific documents as a subset of the system document repository.
<b>Part Lots</b>	A way to track inventory that is allocated to a project.
<b>Purchase Requests</b>	A way to track purchasing and committed budget for projects.
<b>Tasks</b>	A grouping of all tasks for a specific project. Good for project planning and provide link to Microsoft Project.
<b>Users</b>	Users can be assigned access to projects.
<b>Work Orders</b>	All actual allocated work on a project is linked through this function.

\*In development

## Section 8: Parts Features

PARTS	
<b>Parts Inventory Management</b>	A built-in parts/consumables inventory management capability supports ensuring that components needed to support operations and maintenance are available; parts quantity on-hand; reserved by work orders, total available and quantity on order (via purchase request) is available.
<b>Lots</b>	Manage parts by lot. Actual unit cost and location of a part is tracked to the lot level.
<b>Stock</b>	Identify parts that you will maintain in inventory as “stock”.

PARTS (con't)	
<b>Hazardous Material</b>	Identify those items that must be treated as a potential hazard. Good for filtering assets to prepare for safety audits.
<b>Inventory Location</b>	Warehouse location, aisle, shelf and bin are available and a part lot and its quantity can be placed at any one of these levels.
<b>Actual Costs</b>	Actual costs of parts are recorded and tracked.
<b>Reorder Points</b>	Set reorder points. Parts which are active and stockable and whose available quantity is at or below designated levels are flagged as parts to reorder.
<b>Documents</b>	Attach key part information to part records.
<b>Convert to Asset</b>	Parts are received through Purchase Request receiving or directly in the parts module and they go through customer process (inspection etc.) and placed in inventory locations. Option to convert at assignment parts to assets for future tracking at that time it becomes a unique "asset" with its own unique attributes (Asset ID, inventory locations. serial number, etc.).

## Section 9: Labor Features

LABOR	
<b>Labor Types</b>	Labor can be employees or contractors that can be assigned work.
<b>Financial information</b>	Financial info access can be granted or revoked on a user-by-user case. Only persons who have financial access can grant it.
<b>Service Group</b>	Service groups are used to categorize similar services and to make selection of services for work orders easier. A labor resource can be associated with one or more service groups which would also make it easy to identify certain individuals with specific service category experience.
<b>Load Leveling*</b>	View labor by service group and optionally by individual resource and the assigned work in a calendar view to support management load-leveling and work reassignment.

LABOR	
<b>Training</b>	Maintain certification records, and training records including expiration dates.
<b>Active / In-active</b>	Option to make users in-active. Inactive users can not log onto the system. This allows the access to be controlled without deleting historical data associated with the specific user/labor.

\*In development

## Section 10: Purchase Requests Features

PURCHASE REQUESTS	
<b>Purchase Requests</b>	Used to request parts from your existing Purchasing system. The quantity of parts on order is also reflected on the parts screens to reduce likelihood of double ordering. When parts are received the system guides the user to place the received quantity in specific inventory locations and the system creates a unique lot along with unit cost for each part lot. Parts are then available to be added to Work Orders.
<b>Documents</b>	Useful to link vendor quotes or additional information to purchase request record.
<b>Send Email</b>	Send purchase request for approval and then to purchasing organization once approved.