

CUSTOMER WORKGROUP MEETING MINUTES

Facilities Management – Facilities Information Systems

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| DATE: | Friday, March 06, 2009 |
| TIME: | 11:00 AM - 12:00 PM |
| MEETING LOCATION | M & O Conference Room 124D |
| MEETING NAME: | M & O Archibus Review |
| MEETING COODINATOR: | Pamela Duff, FIS |
| ATTENDEES PRESENT: | Ray Dinello, Pamela Duff, Hai Dang, David Champion, Larry Howell, Christy Carroll, Case, Art Sutherland, Joey Cochran, Larry Griffin, James Williams |

Meeting Topics

| DISCUSSION | |
|---|--------------------|
| <ol style="list-style-type: none"> 1. Review completed Projects and New Project additions 2. Equipment type reports review-clean up <ol style="list-style-type: none"> a. PM update completed; Hai updated all old procedures to the new procedures based on the given information from Larry. Christy/Larry will provide list 3. Clean up /review any suggested changes (spreadsheet) 4. Print views for PMs, Service Calls and Project 5. New Ability to submit FIS projects via Administration Activity in Archibus 6. Punch list status (In production) Tracking of project WR --email notificiation lets PAs/Supervisors know work request can be closed 7. FIS Project # 20080024 - Work Request Satisfaction Survey-- WR Survey meeting Scheduled 17 March 2:30 pm - 3:30 pm: Requested by FBO 8. Strategic Planning reports discussion <ol style="list-style-type: none"> a. Hai added the new Strategic Planning role to M &O's Supervisors' Archibus account. When logged into Archibus, they will have a role titled Strategic Planning located under the Building Operations Management section. b. There are 4 new reports under Strategic Planning that are very beneficial. Each report allows you to select a date range and the ability to filter on a particular shop. Brief explanation of each report: <ul style="list-style-type: none"> 1.1.1 Labor Availability – Returns the total available hours for each craftsperson and how the hours are distributed. 1.3.1 PM / WR Count – Returns a count of Preventive Maintenance and Work Request count 1.3.2 WR Average Hours by Parts – Returns the average hours spent on a work request where a work request includes no parts, any part, only stock parts, other charges, or external charges. 1.5.1 PM Completed Percentage – Returns the percent of completed Preventive Maintenance request. 9. CF Function Level <ol style="list-style-type: none"> a. Function level: Contributing (1), Journeyman (2) and Advanced (3) b. Suggestion for more detail/definition of each level especially for PAs c. Larry H stated that it was the supervisors responsibility to monitor skill levels according to work CFs are assigned | |
| UPDATES | COMPLETED PROJECTS |
| <ol style="list-style-type: none"> 1. FIS Project # 20080022 CF Skill Level Report <ol style="list-style-type: none"> a. PAs can currently choose function skill at time entry ie. Craftsperson, crew assignment, hrs, etc --Use date range; shows CFs, time work in each level 2. FIS Project # 20080043 Budget Management for parts and materials (Non-Reimbursable Account Report) <ol style="list-style-type: none"> a. View what shops spent --SDI Supervisor Report b. Shows SDI charges in lump sum--grouped by zone/shop c. Data pulled after WR is closed from Historical WR data 3. FIS Project # 20090245 Returned Parts <ol style="list-style-type: none"> a. Correct xml to allow status that place orders into returned. b. Allows work flow to allow WR to not go into WS 4. FIS Project # 20090242 BOM Strategic Planning Reports- ready for review; added shop filter-now completed | |
| NEW PROJECT REQUESTS | |
| <ol style="list-style-type: none"> 1. FIS Project # 20090247 CF Assign -- For Reimbursable WRs <ol style="list-style-type: none"> a. When completing Estimate in Archibus -- enable where Supervisor/PA must assign at least one employee | |

- a. when completing Estimate in Archibus - enable where Supervisor / FA must assign at least one employee.
- b. Include viewing the CF level code on WR somewhere and CF report for perform on hours, level and functions
- 2. FIS Project # 20090281 Furniture/CAFM Classroom Seating layout; Dionte will send list of selection to Larry H.
- 3. FIS Project # 20090246 Customized console for searching; This is to develop a console for the PM list of templates
- 4. FIS Project # 20090291 WR/PM Attachments: Ability to attach/upload scanned documents, pictures, etc to work requests and PMs--for customers; function available, just have to develop it to work in our system
- 5. FIS Project #20080040 PDA pilot program (With scanners) Different kinds. Zone test. --ON HOLD for funding--i.e. 5 yr plan item
- 6. FIS Project # 20090333 Streamlining Print WR button/views for 17.2--FIS will do a Pilot Test/Demo for Larry H.
- 7. FIS Project # 20090334 PM Equipment Report-break up by type equipment -- Standard is the key
 - a. Total PMs completed monthly of those scheduled/generated
 - b. ie. Number PMs scheduled for month --- display total in completed status
- 8. FIS Project # 20090335 Attach lockout/tagout procedures to the work orders in Archibus--5 yr Plan item (Safety attachments/confined space)
- 9. FIS PProject # 20090339 FAM Reimbursable Estimate Notification-Notifies FAM when Reimbursable WR are within 10% of estimated costs-updates & informs FAM when scope changes -- addition to the CF Estimate project.

| ACTION ITEMS | PERSON RESPONSIBLE | DEADLINE |
|---|-----------------------|--------------------------|
| Acquire from SDI a list of WOs over past 6 mths; parts/items returned; use list to perform followups / checks | Ray Dinello | |
| Demo for Larry Howell on Streamlining of WR Print views for 17.2 | FIS | |
| Add M & O Supervisor role to Strategic Planning activity | Hai Dang | Completed March 6, 2009 |
| Have Dionte Sims send list of selections for Furniture/CAFM seating layout to Larry Howell | Ray Dinello | |
| Christy will provide list of PM missing--PM/schedule cleanup | Christy Carroll-Case | |
| Any WR changes (Excel Spreadsheet sent 9 February) | All M & O Supervisors | |
| NEXT SCHEDULED MEETING DATE | TIME | LOCATION |
| Wednesday, March 25, 2009 | 10:30 AM - 11:30 AM | M & O Conference Rm 124D |

