KJ(1

SchoolDude Training

Arkansas Division of Public School Academic Facilities and Transportation

SchoolDude

AAEA/ASPMA CFD Certification Classes

Maintenance Direct
&
Preventative Maintenance Direct

April 19, 2016 - Springdale, AR

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Maintenance Direct
Training

2

Agenda

- Set Up
- Processing Work Orders
- Search and Advance Search
- Saved Actions
- KPI's & Data Management

3

Why Maintenance Direct??

Value to Your Administration

- Capture the total picture of facility support services
- Improved reporting to more accurately calculate budget and staffing needs

Value to Your Staff & Faculty

- Improved service, communication and feedback
- Increased responsiveness to problems

Value to the Facility Team

- Improved efficiency by reducing data entry and phone calls for work orders

Benefits

- Increases productivity more than 20%
- Saves your maintenance staff up to 1-hour per work order annually

- **#1 DATA.** You do the work, "Get Credit For It".

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Implementation Strategies (2012)

- **Train internal staff first (non-requesters)**
  - Clearly identify the process you want the staff to follow and the image you want the department to portray
  - Use SchoolDude to help train specific user roles
- **Expect and prepare for resistance to change**
  - Be clear in explaining why the change is occurring
  - Make yourself available to answer group or individual questions
  - Encourage feedback
- **Try a pilot program**
  - Roll out program to a single school or building, or internally to your maintenance team first
- **Use information to reward high performers**
  - Search for requester that utilizes system the most
  - Acknowledge the technician who responds the quickest
  - Gift certificates, dinner coupons to restaurants, plaques, trophies, inexpensive toys like mp3 players
- **Review Performance and make adjustments**
  - Most important step to success. Get feedback from appropriate team members and adjust methods as necessary

2012 Strategies
Are districts still
having trouble implementing?

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Logging Into MaintenanceDirect

- Enter md.schooldude.com, schooldude toolbox login, into your browser's address bar.
- Enter your login name and password. Be sure MaintenanceDirect is selected in the drop-down menu.
- Click **Sign-in**

Best Practices

Good

- Where - Locations
- What - Crafts
- Who – Train and involve internal department users
- Setup email notifications

Better

- Transactions – Labor, Purchase and Issue
- Contract work – Track costs for outsourced work
- Purpose Codes/Budget/Project/Custom Category – Use this to track additional details
- MySchoolBuilding – Roll out to requesters/all end users

Best

- Reporting – Analyze and Compare data
- Equipment – Associate with a work order
- Saved Actions –Automatically distribute reports
- Survey your customers – Get feedback and increase transparency
- Integration with - FSDirect, InventoryDirect, ITDirect, PMDirect, MDWireless, PlanningDirect, Critical Alarms Automation, and TripDirect

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Arkansas: Required Work Order Fields

Location – Defines in the broadest terms, **"WHERE"** the work will be performed. You must have a **"Location"** to be able to access "Building". Also this helps in reporting because it makes reports more specific. A Location and Building could be the same. Ex. John Doe Middle School (location), John Doe Middle School (Building).

Building – Free standing structures under a common roof.

Purpose – Purpose codes help you describe **"why"** the work is being done. **It is a "USER" defined category.** So Arkansas has defined our own list, to provide reporting based on state laws.

Electrical	Preventive Maintenance
Exterior	Roof
Fire & Safety	Site
HVAC	Space Utilization
Interior	Specialties
Other Miscellaneous	Structural
Plumbing	Technology

BE SPECIFIC! Don't use **"Other Miscellaneous"** for everything!

Academic/Non-Academic - Only two choice's but very critical.

Academic: Facilities where activities essential to academic instruction occurs.

Non-Academic: Facilities where activities not essential to academic instruction occurs.

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Account Setup is Critical

Manage Codes: Locations

Locations: = **WHERE** the work will be performed.

- To **Add** a New Location, click on **+Add New Location**
- To **Edit** an Existing Location, click on the Location Name and make the necessary changes.

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Manage Codes: Buildings

- A subset of locations, is "Buildings".
- Buildings should be used to designate a free standing structure under a common roof.

You will need to first select the Location with which the "Building" is associated.

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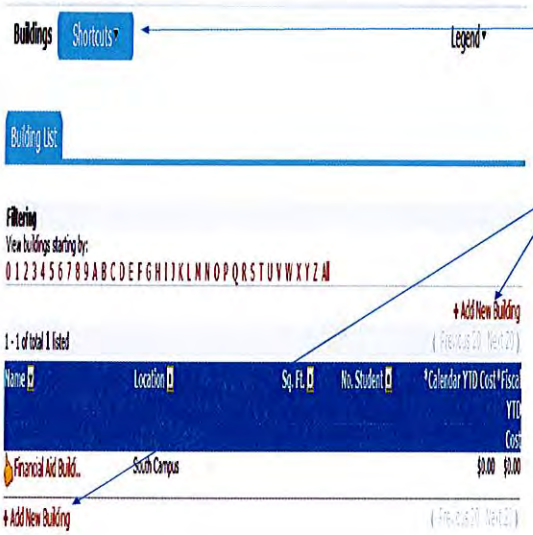
Adding a New Building



Click on "Shortcuts" then select "Add" from drop down box

Or

Click on "Add New Building"

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Managing Codes: Purpose

Purpose: Required in Arkansas

Purpose – Purpose codes help you describe "**why**" the work is being done. **<u>It is a "USER" defined category.</u>** So Arkansas has defined our own list to provide reporting based on state laws.

Electrical	Preventive Maintenance
Exterior	Roof
Fire & Safety	Site
HVAC	Space Utilization
Interior	Specialties
Other Miscellaneous	Structural
Plumbing	Technology

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Managing Codes: Academic or Non-Academic

Academic: Facilities where activities essential to academic instruction occurs.

Non-academic: Facilities where non academic activities occur.

A building is considered Academic if it has even one (1) activity essential to academic instruction in it.

A building is considered Non-academic if it does not have activities essential to academic instruction in it.

Note: A "Non-academic" building can have an "Academic" function in it, Ex. Gym or a football field used for graduation.

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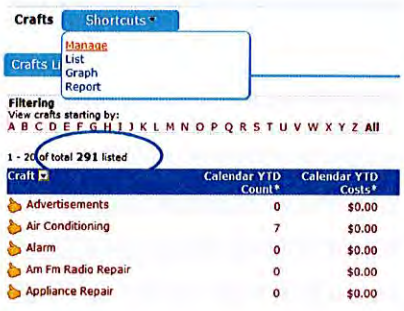
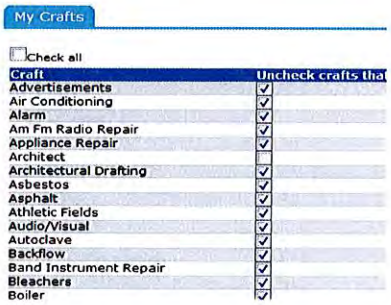
Manage Codes: Crafts

CRAFT = <u>WHAT TYPE</u> of work is being done (HVAC, Plumbing, etc.)

- **<u>Choose the Minimum</u> amount of Crafts you will need, to organize your work orders for reports.**





Remember to click Save at the bottom of the screen after making any changes to the Crafts list.

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Manage Codes: User Roles: Definitions

Administrator: Full system rights. Only role with access to the Account Setup tab. No limit on the number of administrators. Caution: Has Access to **Account Setup tab.**

Supervisor I: Can create, edit, and assign any work order. Can run all reports and view all work orders. No access to the **Account Setup tab.**

Supervisor II: Must be assigned specific Locations and Crafts during setup. Can only create/edit/assign work orders with Locations/Crafts selected that match their assignments. Can only assign work orders to users that report to them. Can run limited reports.

Site Administrator: Approval role for specific Location(s). Must be assigned these Location(s) during setup. Cannot run reports. Can only view work orders for their assigned Location(s).

Technician: Will be assigned the work order to complete work. Cannot reassign a work order. Can complete work order online, including Labor and Purchase transactions (to be covered in the Advanced MD Class). Does not need Location or Craft assignments in setup.

Clerk: Data entry role. Can use keyboard shortcuts to enter information onto multiple work orders. Can create/edit/assign all work orders and run limited reports.

Requester: Can submit and track work requests through www.myschoolbuilding.com. Login is email address. All Requesters use a common "Submittal" password. **Can add themselves as users.** Requesters should NOT be assigned Locations.

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Adding Users Continued

When adding/editing a User, you need to select their Role:

- **Comptroller** (There can be only one!)
  - New Request Routing can be set up to automatically send work orders to the appropriate person based on the fields selected in the work order.
  - If a work order is created that does not match any designed routes, it will be assigned to the Comptroller who can then manually reassign the work order. Comptroller is your safety net.

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Managing Users: Add new user, change role, disable users

To access the list of MD Users, click on your **Account Setup** tab, then click on the shortcut link for MD Users.

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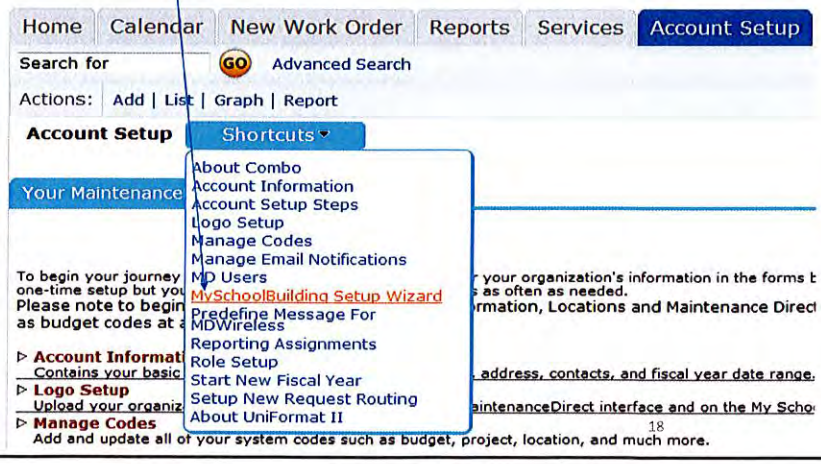
MySchoolBuilding Setup for Requesters

About the **Requester** role:

- Requesters do not sign into MaintenanceDirect to submit a work order. Instead, they go to a separate website: www.myschoolbuilding.com
- Requesters do not have individual login names and passwords. Instead, they will use their email address as their login name and will submit work requests using a global **Submittal Password** that you will set up.



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The Home Page

First Contact the next 3 slides

WORK ORDERS BY STATUS

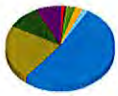
Last 10 Work Requests

Period All

Work In Process

Request Totals

- [x] 235 New Request
  - 20 UNASSIGNED
  - 195 In Approval Process
  - 13 PMs
  - 7 PDs
- [x] 101 Work In Progress
  - 12 PMs
  - 6 PDs
- [x] 44 Complete
  - 2 PDs
- [x] 34 Closed Work Orders
  - 2 PMs
  - 5 PDs
- [x] 5 Declined
- [x] 2 Parts on Order
- [x] 1 Duplicate Request
- [ ] 0 Void
- [ ] 0 On Hold
- [ ] 0 Waiting More Information



- New Request
- Work In Progress
- Complete
- Closed Work Orders
- Declined
- Parts on Order
- Duplicate Request
- Pending
- Deferred
- Forwarded

The statuses with checks in the boxes are the statuses that will be shown in the pie chart.

Click on the number next to status to view all work orders in that status

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WORK ORDERS BY STATUS

Last 10 Work Requests

Check the categories (ingredients) you want to monitor and have in your pie

Period All

Work In Process

Request Totals

- [x] 235 New Request
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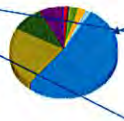
- [ ] 0 Void
- [ ] 0 On Hold
- [ ] 0 Waiting More Information

6 Pending



- New Request
- Work In Progress
- Complete
- Closed Work Orders
- Declined
- Parts on Order
- Duplicate Request
- Pending
- Deferred
- Forwarded

New Request: There are 235 work orders That have a status of "New Request

Unassigned: There are 20 "New Request" that have been approved by others or routed to you and are waiting For you to take action.

In Approval Process: There are 195 "New Request" Waiting for someone else to approve other than yourself.

Work in progress: Work order approved, routed, and started but not yet "Completed" or "Closed".

Pending: Work orders generated in PM Direct waiting for you to turn them into "New Requests". Note: they cannot be accessed by technicians until you change them to "New Request" unless they are assigned to technicians in PM Direct.

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Processing Work Orders

RULE #1 ALWAYS CLICK ON SAVE

WORK ORDERS BY STATUS

Last 10 Work Requests

Period All

Request Totals

- ☑ 235 New Request
  - 20 UNASSIGNED
  - 195 In Approval Process
  - 13 PMs
  - 7 PDs
- ☑ 101 Work In Progress
  - 12 PMs
  - 6 PDs
- ☑ 44 Complete
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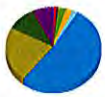
- ☑ 34 Closed Work Orders
  - 2 PMs
  - 5 PDs
- ☑ 5 Declined
- ☑ 2 Parts on Order
- ☑ 1 Duplicate Request
- ☐ 0 Void
- ☐ 0 On Hold
- ☐ 0 Waiting More Information

Work In Process



- New Request
- Work In Progress
- Complete
- Closed Work Orders
- Declined
- Parts on Order
- Duplicate Request
- Pending
- Deferred
- Forwarded

New Request
Choose a locations, Building, Purpose code Academic or Non-academic and assignee

Printing Work Orders
Lots of options, Batch Print, Individual Work orders, Advance Search assignee, Building, location specific...

Updating Work Orders
Summarize the corrective action in the "ACTION TAKEN" section, Please don's say **"Fixed it"**

Transactions
New Purchase Transactions
New Labor Transactions
Multiple Transactions option

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Updating Work Orders

Action Taken

Action

Transactions

New Purchase Transaction
New Issue Transaction
New Labor Transaction

1 - 3 of total 3 listed

Date	Item Number Description	Type Invoice/PO #	Labor	Qty	Cost Each	Tax	Shipping/ Other	Amount
2/7/2012	technician Schoolduie	Labor	6		$13.00	$0.00	$0.00 $0.00	$78.00
2/7/2012	Tools	Materials		4	$6.00	$0.00	$0.00 $0.00	$24.00
2/6/2012	technician Schoolduie	Labor	5		$13.00	$0.00	$0.00 $0.00	$65.00
			11					
							Total Labor	$143.00
							Total Sales Tax	$0.00
							Total Purchases	$24.00
							Total Inventory	$0.00
							Total Shipping	$0.00
							Total Others	$0.00
							Grand Total	$167.00

Status ☑

Complete
New Request
Work In Progress
Complete
Closed Work Orders

Action Taken – Summarize what corrective action was taken to address issue. Requesters will be able to view this information. **Fixed It? Please NO!**

Transactions:

Purchases of any materials or contract services needed to correct the problem

Labor Hours for the employees that worked on the job

Status – Change status of work order to complete or closed.

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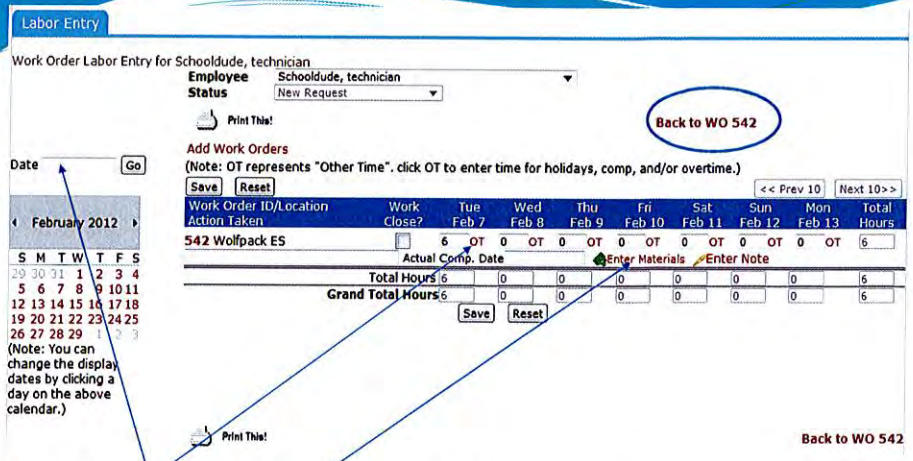
Labor Transactions



1. Enter number of hours worked underneath the respective date.
   NOTE: OT can be used to record hours other than the Regular labor rate for that day.
2. Action Taken box located underneath the work order number and location.
3. Enter Materials link will open a new browser window to allow user to input purchase transactions.
4. Calendar and or Date box on left can be used to enter labor for other dates than the ones displayed in the blue bar.

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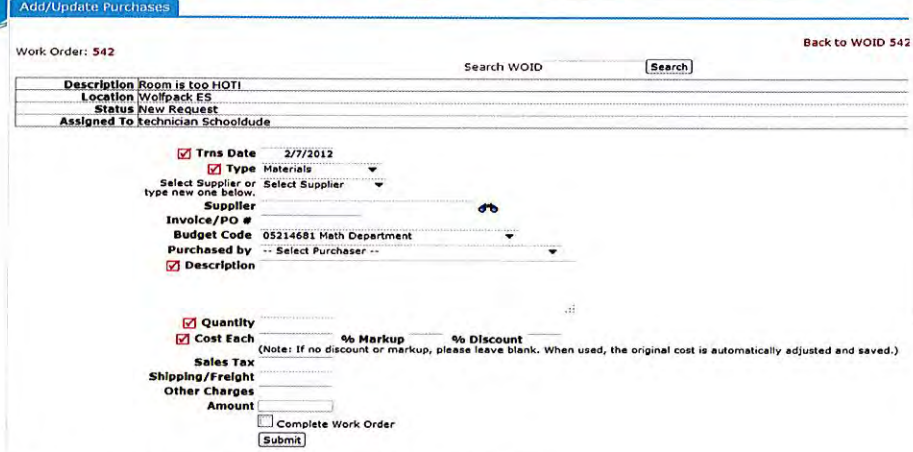
Purchase Transactions



1. Type of Purchase Transaction (Materials, Rental, Contract Services)
2. Supplier (can be added as you go or build a master list in Account Setup)
3. Description of purchase or service received
4. Enter Quantity and Cost Each
5. Click on Submit to Save transaction. Page will refresh so you can continue with other transactions or go back to work order form

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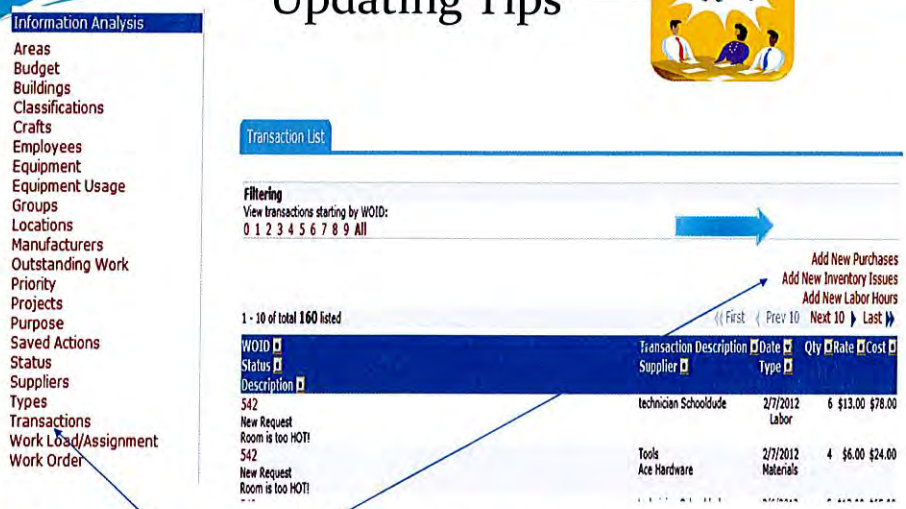
Updating Tips



- Click on "Transactions" in the Information Analysis list on your home page
- Click on Labor, Purchase or Issue Transaction links on the right
- This will allow you to enter up to 7 transactions at a time

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New Work Request Routing

Definition: A defined workflow that determines who is going to be assigned a new work order. This workflow may be only to one person, or there may be several steps.

- The work request can be assigned based on the following work order fields:
  - Location
  - Building
  - Craft
  - Purpose Code
  - User who approved the work order last
- Routing rules can mirror your internal approval processes, and improve your efficiency. They can also keep the appropriate parties "in the loop" if you need approval before work can begin.

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Tracking Work Orders

Through:

Reports

And

Search and Advance Search

Reports Overview

Glimpse at possibilities

Actions: Add | List | Graph | Report

- **Work Order Reports**
  - Summary 2 – Calculates Days Aged for each work order in report
  - Detail – Great for exporting to Excel and manipulating data for pivot graphs or specific reports
- **Transaction Reports**
  - Perfect for exploring costs associated with labor for specific employees or money spent with specific vendors/suppliers.
- **Location Reports**
  - Summary by Craft shows total and averages for labor hours and costs by location or by craft per location. Great for investigating if particular locations have more specific issues than others.
- **Craft Reports**
  - Shows overall cost and labor hours per craft which can be used to make informed decisions on what skills are needed when considering hiring new employees
- **Pivot Chart – "Action Graphs"**
  - Option for Work Order and Transaction Reports. Can be utilized with any Excel Spreadsheet exported from MaintenanceDirect. Great for visualization of costs and useful for reports or meetings.

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How to Access Reports

Pull up a area to start

SchoolDude Maintenance Department

Home | Calendar | New Work Order | Reports | Services | Account Setup

Search for: GO

Advanced Search | Help

Need Training?

Do you need a refresher course to learn some new helpful hints? Then click here to view our FREE training services.

Quick Launch

New Request
Print WO Batch
Account Settings
User Forum
More Services
My SchoolBuilding
SchoolDude.com

LOGIN HERE

Hello Kimberly Admin!

WORK ORDERS BY STATUS

Last 10 Work Requests

Period All

Request Totals

- 486 New Request
  - 90 UNASSIGNED
  - 366 In Approval Process
  - 372 PMs
  - 17 FSs
  - 10 PDs
- 596 Work In Progress
  - 470 PMs
  - 5 FSs
  - 26 PDs
- 221 Complete
  - 136 PMs
  - 9 FSs
  - 8 PDs
- $679 Closed Work Orders

Work In Process

- New Request
- Work In Progress
- Complete
- Closed Work Orders
- Declined
- Parts on Order
- Duplicate Request

Information Analysis

Areas
Budget
Buildings
Classifications
Crafts
Employees
Equipment
Equipment Usage
Groups
Locations
Manufacturers
Outstanding Work
Priority
Projects
Purpose
Saved Actions
Status
Suppliers
Types
Transactions
Work Load/Assignment
Work Order

Location Summary Report

Talk About It! | Account Setup Steps | New | My Locations | Graph My Costs | Print My Costs | Print My Counts | Quick Links - Buildings

Start Here

Print My Costs by Location

1) Select Your Reporting Period

Last Month

Custom Begin

Custom End

2) Choose the type of reporting date:

- (•) Request Date
- ( ) Requested Completion Date
- ( ) Target Start Date
- ( ) Target Completion Date
- ( ) Completion Date
- ( ) Transaction Date

3) Select Your Location(s)

-- Include ALL Locations --
Administration
Beardshere Hall
Eyer
Curtis Hall

4) Select Your Status(es)

-- Include ALL Statuses --
New Request
Work In Progress
Complete
Closed Work Orders

5) Select Your Purpose(s)
(Note: To select multiple hold Ctrl key down.)

-- Include ALL Purposes --
Capital Request
Event Setup
Preventive Maintenance
Reactive Maintenance

6) Select Your Craft(s)
(Note: To select multiple hold Ctrl key down.)

-- Include ALL Crafts --
--- MD Crafts ---
Carpentry
Climate Control
Contractor

7) Choose a report type for viewing:

- (•) Summary Report Location
- ( ) Estimate vs. Actual Analysis Report
- ( ) Detail Report

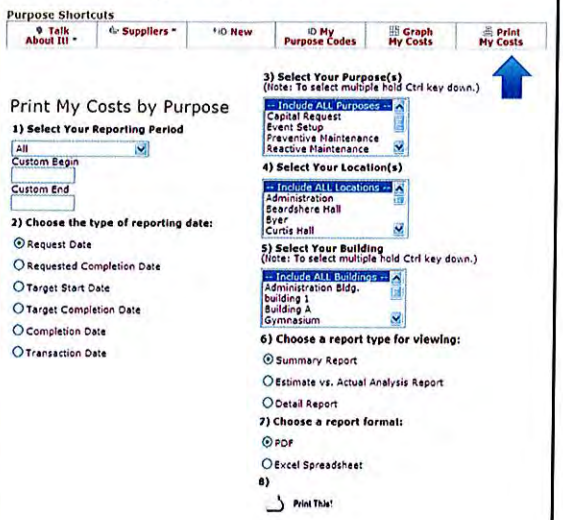
8) Choose a report format:

- (•) PDF
- ( ) Excel Spreadsheet

9) Print This!

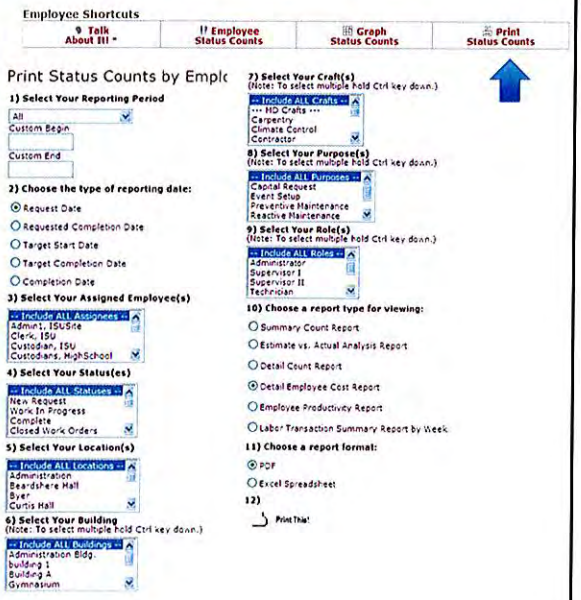
Purpose Code Summary Report

1) From the "Information Analysis" list, select Purpose.
2) On the "My Purpose Codes" page, click on "Print My Costs" from the shortcut section at the top of the page.
3) In step 1 either select a predefined reporting period or enter a custom begin and end date.
4) In step 2 choose the type of reporting date you would for step 1 to reflect.
5) Use steps 3 to 5 to filter down your report.
6) In step 6 decide between the Summary, Estimate vs. Actual Analysis, or Detail Report.
7) In step 7 choose a report format for viewing and then press the "Print This!" icon. (PDF)



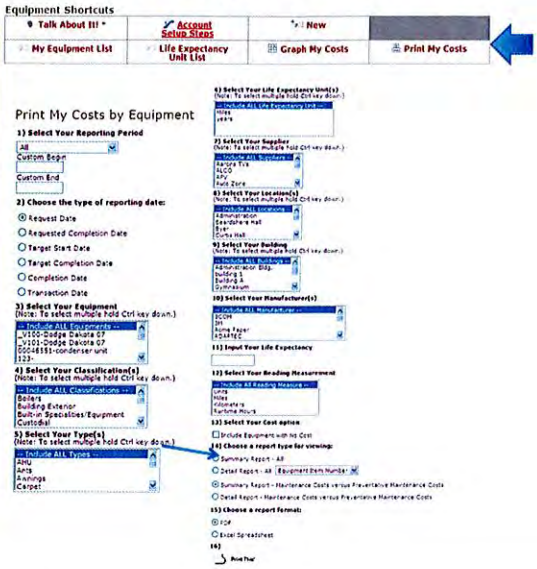
Detail Employee Cost Report

1) From the "Information Analysis" list, select Employees.
2) On the "Employee Status Counts" page, click on "Print Status Counts" from the shortcut section at the top of the page.
3) In step 1 either select a predefined reporting period or enter a custom begin and end date.
4) In step 2 choose the type of reporting date you would for step 1 to reflect.
5) Use steps 3 to 9 to filter down your report.
6) In step 10 choose one of the report types for viewing. (Detail Employee Cost Report)
7) In step 11 choose a report format for viewing and then press the "Print This!" icon. (PDF)



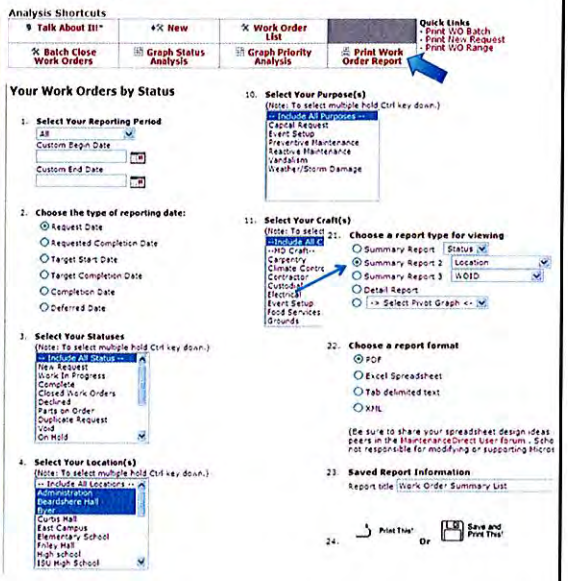
Maintenance vs. Preventative Maintenance Equipment Report

1) From the "Information Analysis" list, select Equipment.
2) On the "My Equipment List" page, click on "Print My Costs" from the shortcut section at the top of the page.
3) In step 1 either select a predefined reporting period or enter a custom begin and end date.
4) In step 2 choose the type of reporting date you would for step 1 to reflect.
5) Use steps 3 to 13 to filter down your report.
6) In step 14 choose one of the report types for viewing. (Summary Report - Maint Costs vs. PM Costs)
7) In step 15 choose a report format for viewing and then press the "Print This!" icon. (PDF)



Work Order Summary Two Report

1) From the "Information Analysis" list, select Work Order.
2) On the "Work Order Summary List" page, click on "Print Work Order Report" from the shortcut section at the top of the page.
3) In step 1 either select a predefined reporting period or enter a custom begin and end date.
4) In step 2 choose the type of reporting date you would for step 1 to reflect.
5) Use steps 3 to 20 to filter down your report.
6) In step 21 choose one of the report types for viewing. In the drop down next to the report, choose how you would like the report results sorted/grouped (Summary Report Two/Location)
7) In step 22 choose a report format for viewing and then press the "Print This!" icon. (PDF)



Work Order Summary Two Report, View

Work Order Summary List

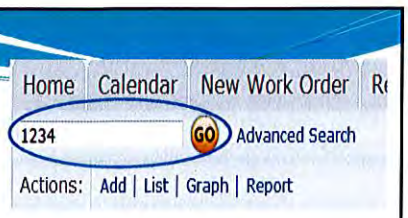
All Dates Selected. Order By Location, Status

WOID / Priority / Assigned To / Requester Name	Building / Status	Area / Area Number / Description	Deferred By / Reason	Until	Request Date / Created Date/Time	Target Comp Date / Actual Comp Date / Action Taken	Days Aged	Labor Hours	Total Costs
Location:	Byer								
1011					5/23/2008	6/25/2008	6	2	$71.95
Medium	Closed Work				5/23/2008 12:32:18 AM	5/29/2008			
Service_Dude, ISU		Monthly - Filter Changes - Quarterly - to PM schedule details.		All location - Refer		changed			
Jed DeGroote									
1039					6/9/2008	7/23/2008	127		$1.95
Medium	Closed Work				6/9/2008 12:32:34 AM	10/14/2008			
Service_Dude, ISU		Monthly - Filter Changes - Quarterly - to PM schedule details.		All location - Refer					
Dudeness El									
1054					7/14/2008	8/27/2008	92		$1.95
Medium	Closed Work				7/14/2008 12:33:16 AM	10/14/2008			
Service_Dude, ISU		Monthly - Filter Changes - Quarterly - to PM schedule details.		All location - Refer					
Jed DeGroote									
1072					8/11/2008	9/24/2008	64		$1.95
Medium	Closed Work				8/11/2008 12:33:55 AM	10/14/2008			
Service_Dude, ISU		Monthly - Filter Changes - Quarterly - to PM schedule details.		All location - Refer					
Jed DeGroote									
1107					9/8/2008	10/22/2008	36		$1.95
Medium	Closed Work				9/8/2008 12:33:04 AM	10/14/2008			
Service_Dude, ISU		Monthly - Filter Changes - Quarterly - to PM schedule details.		All location - Refer					
Jed DeGroote									
1123					10/13/2008	11/26/2008	1		$1.95
Medium	Closed Work				10/13/2008 12:32:40	10/14/2008			
Service_Dude, ISU		Monthly - Filter Changes - Quarterly - to PM schedule details.		All location - Refer					
Jed DeGroote									
1136					10/15/2008		1	3	$75.00
Medium	Closed Work				10/15/2008 12:34:10	10/16/2008			
Custodian, ISU		Yearly - Assessment-Boiler-Annual - Refer to PM schedule details.							
Jed DeGroote									
Count: 18 Work Orders		Avg. Age of WO's 222				Total for Byer	23.8		$714.20
Count: 49 Work Orders		Avg. Age of WO's 178				Grand Total	100		$3,820.56

Search and Advanced Search

Search Box

- Type in work order number to open work order form
- Type any keyword to find a list of all work orders with that keyword



Search Results

1 - 15 of total 15 listed

WOID	Description / Status / Action Taken	Request Date / Completion Date	Requester	Assigned To	Location / Area Type / Area Number
108	Roaches are crawling on the floor and walls Closed Work Orders	1/8/2008 1/8/2008 2:52:57 PM	Steve Wojo	Hill, Grant	Duke Campus 2nd Floor room 202
114	Ants everywhere Work In Progress	1/14/2008	Jeff Capel	Capel, Jeff	Duke Campus
115	Junebugs Work In Progress	1/14/2008	Jeff Techie	K, Mike	Dude High School
122	Ants everywhere Time Available: 2:00 Void	1/16/2008	bill - 7/10/08 bill	Fletcher, Jim	Dude High School 1001
149	Removal of escaped lab rats Closed Work Orders done	2/1/2008 2/1/2008	Mike K		Duke Campus 3rd Floor
151	Please comb the catacombs for vermin. Void void	2/4/2008	Requester1 jpm	jpm, Super1	Western Harnett High School Catacombs n/a
152	Please get rid of the groundhogs in the outfield. Time Available: 3 days Closed Work Orders approved	2/4/2008 2/4/2008 3:26:08 PM	Requester1 jpm	jpm, Tech1	Western Harnett High School Baseball Field n/a
182	there are ants in the back of the auditorium Closed Work Orders put down ant killer	2/7/2008 2/8/2008 11:56:33 AM	Ali Reqstr1	Tech1, Ali	Location B Auditorium back of the room
223	test Complete	2/15/2008 3/10/2008 8:56:26 AM	requester3 jpm	jpm, Super1	Western Harnett High School x
264	Look at all these roaches, running around Work In Progress	3/3/2008	Jeff Techie	Techie, Jeff	Summerville High School - Main Campus
281	ants coming in through the window Work In Progress	3/11/2008	Ali Reqstr1	Tech1, Karen	Location B 100
293	There are ants crawling all over the cafeteria and kitchen Complete	3/13/2008 3/14/2008	Anne Elliot	Tech2, Karen	Northanger Abbey Middle School Cafeteria
312	The counters are swarming with ants. Complete sprayed for ants	3/17/2008 3/18/2008	kimberly requester2	super2, kimberly	Kimberly Middle School Faculty Lounge 123
334	Roaches. Please spray. Complete sprayed roach killer spray.	3/18/2008 6/20/2008	kimberly administrator	super2, kimberly	Kimberly Middle School Faculty Lounge 3456
351	roaches crawling everywhere. help! Closed Work Orders set out bad traps	3/27/2008 3/27/2008 4:23:11 PM		Tech1, Karen	Mansfield Park High School Classroom rm. 104

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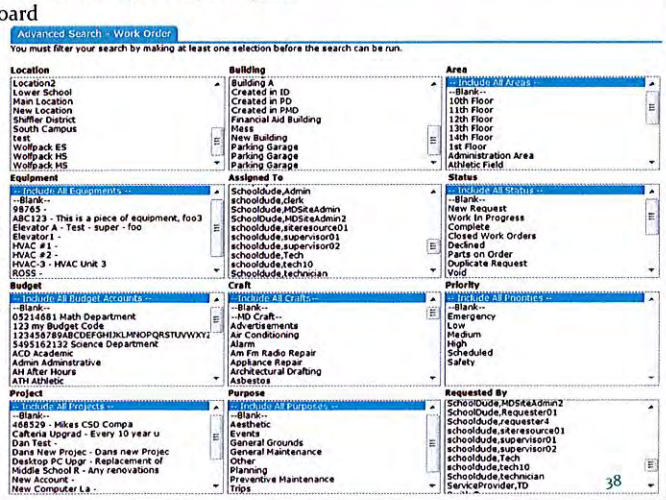
Advanced Search

- Use to search for work orders, equipment records, labor/purchase transactions and equipment usage records
- Select your search criteria in one or multiple fields
- Multiple criteria can be selected in each box by using the Control key on your keyboard



Saved Actions: Work Order Report

Home | Calendar | New Work Order | R

1234 GO ▸ Advanced Search

Actions: Add | List | Graph | Report

Advanced Search

Accessing Work Order Reports

If you have created a Work Order Report that you will use repeatedly, you may save the Report criteria to be used again.

-Click on the **Report** link in the Actions bar
-Click on **Work Order**
- Select the criteria you would like to include in the fields below
- Scroll to the bottom of the page and give your Report a unique name
- Choose Public or Private View: Public View will allow other users to view and edit your saved Search
- Click on Save and Print This to view your results and save your search criteria

23. **Saved Report Information**

Report title Days Aged Report - HVAC

View (What's This)
⊙ Public ○ Private

24. Print This! Or Save and Print This!

39

Saved Actions: Recurring Report Delivery

Actions: Add | List | Graph | Report

Accessing your Saved Reports

- Click on the **List** link in the Actions bar
- Click on **Saved Actions**
- Find the name of the Report or Search that you saved from the list
- Click on **New** in the Schedule column to schedule delivery for your report

Saved Actions

1 - 10 of total 18 listed — First Previous Next Last

Action Title	Action Category	Created By	Date Modified	View	Schedule	Delete
Completed Work for Last Month	Report	Schooldude, Admin	8/10/2011	Public	New	☒
Last Month's Costs by Transaction - MD	Report	Schooldude, Admin	4/6/2010	Public	Edit	☒
Last Week's Costs by Transaction - MD	Report	Schooldude, Admin	4/6/2010	Public	Edit	☒

- Choose the frequency and timing for delivery of your saved report:

Schedule Saved Action

Schedule your advanced search to be run on a one-time or recurring basis

☑ Schedule Type ⊙ One-Time ○ Recurring

Frequency --Select a Frequency--

Daily ⊙ Every Day ○ Every WeekDay

Weekly --Select Days-- Sunday Monday Tuesday Wednesday Thursday Friday Saturday

(Note: hold down the CTRL key to make multiple selections.)

Monthly Day ____ (or ☐ Last Day) of every ____ month(s)

The First Sunday of every ____ month(s)

40

Don't overthink Maintenance

Use the tools you have

41

THE VALUE OF KPI's

KPI = KEY PERFORMACE INDICATOR

School Dude gets KPI's from other K-12 School Districts
School Dude use's 52 KPI's in their data base
Operates on a 365 day rotating basis

STOP GUESSING

With better data you can make better decisions

42

YOUR Data and the SchoolDude nation

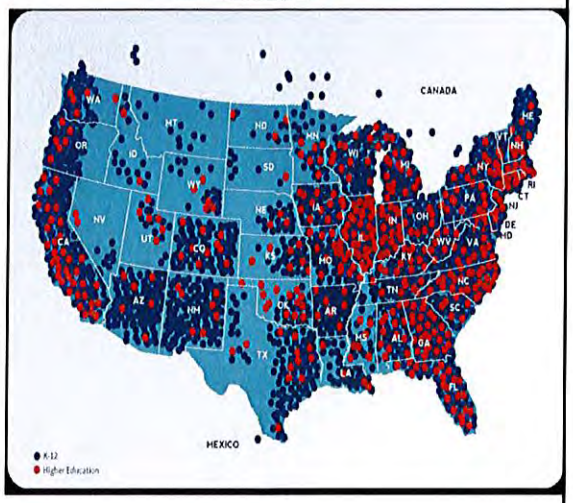
The world's largest educational database

6,000 education institutions
1.5million professionals

Serving 37 million students

In 2014 alone

15.7 million work orders
6.5 million events



Your hard work creates the millions of transactions that we gather and share. As a citizen of the SchoolDude Nation, you're playing an active role in helping schools everywhere become better.

43

Dude Data Dashboard

Overview | Maintenance | Preventive | Facility Use | Energy | Technology

my Key Performance Indicators | Next Steps

Work Orders Completed in less than a Week

Percentage of Work Orders completed in less than seven days.

KPI KEY: ▼ You △ Your Peers in Public K-12 Schools

Live operational data aggregated and compared to peers nationally in 52 KPIs!

KPI
Key Performance Indicator

my Key Performance Indicators | Next Steps

Improve Your Score!

We recommend all of these actions; however, based on the chart above we've highlighted a few for you to focus on.

1. **Commitment to Success.** Establish the key team that will be responsible for transitioning over to MD.
2. **Setup.** Establish key account information including: fiscal year, crafts, default purpose codes, and users.
3. **Requesters.** Enable staff, faculty and internal customers to submit requests online with MySchoolBuilding.
4. **Customer Service Communications.** Enable close loop communications to requesters with automated email notifications.
5. **Establish Key Processes.** Establish a process to route requests for approval, craft-based routing rules to streamline the workflow process. Establish a primary chain-of-command.
6. **Capture Essential Data.** Capture the essentials of work - the "who's requesting", what it is about, when was it requested/completed, where is the problem, why is the work being done?
7. **Capture Financial Impacts.** Capture key financial impacts on your organization, including the labor hours, transactions, inventory and materials for work.
8. **Measure.** Enable basic reporting to establish the volume of work/demand and service response times.
9. **Survey Internal Customers.** Establish a baseline and ask constituents/customers how they view maintenance and operations process today, service response times, and service quality.
10. **Continual Improvement.** Understand qualitative and quantitative feedback and institute process changes for continual improvement.
11. **Tell your story.** Establish regular performance communication rhythms with internal customers, including leadership, key stakeholders and decision makers.

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Faculty/Student Request Portal

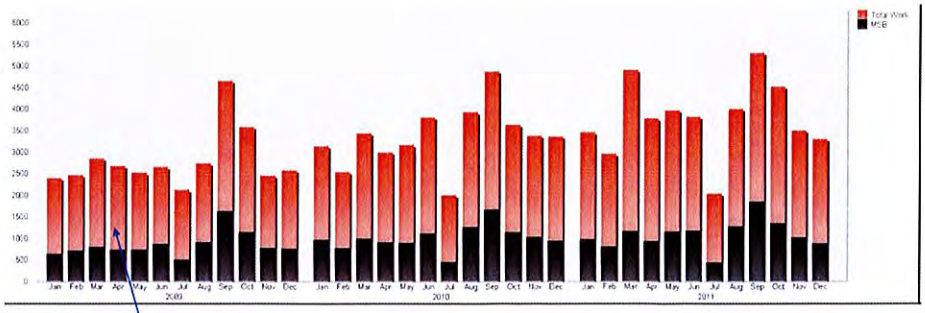
- Do your customers feel like they are a part of the process?
- Do you receive calls for status updates or duplicate requests?
- Is improving Customer service one of your goals?
- Do you have too many crafts on the request form?

Organizations that submit online complete 25% faster

45

The Tsunami effect Myth: BUSTED

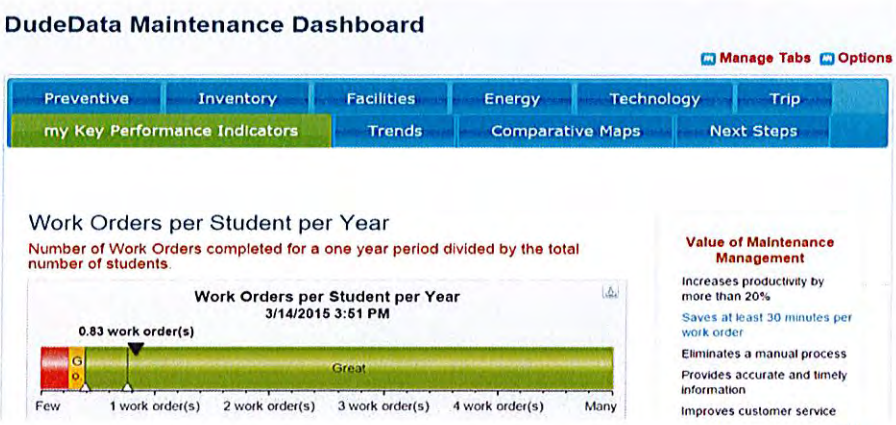
School Dude could not find a data sample where there was a tsunami effect after implementing the Requester Portal (MSB).



Teacher requests

46

Lets Go Live!



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Preventative Maintenance Direct Training

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This screen indicates were a District will login to their account

Go To PM Direct signing in to your individual account then click on the sign in button

https://login.schooldude.com/mlogin

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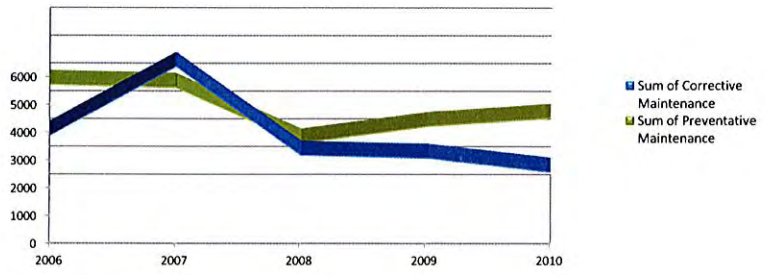
Effect of PM on CM work orders



Corrective Maintenance *(CM)*
Preventative Maintenance *(PM)*

50

Dude Facts

- **25% reduction in number of emergency work orders when using Preventative Maintenance**
- **Corrective maintenance work orders cost 2-3X more than PM work orders**

Buildings

- **All buildings in PM Direct will be noted as a thumbs down until the administrator clicks on the thumbs down icon to activate the building therefore turning the building to a thumbs up.**

52

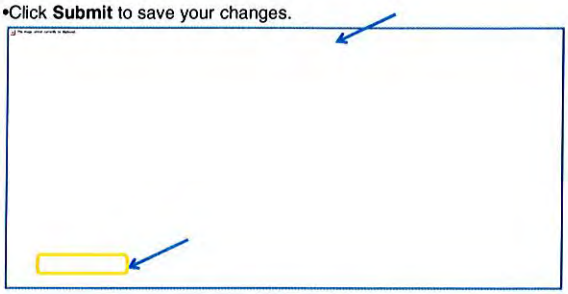
Setup Account Settings

- Click on the **Account Settings** tab
- Click on the **Account Settings** link

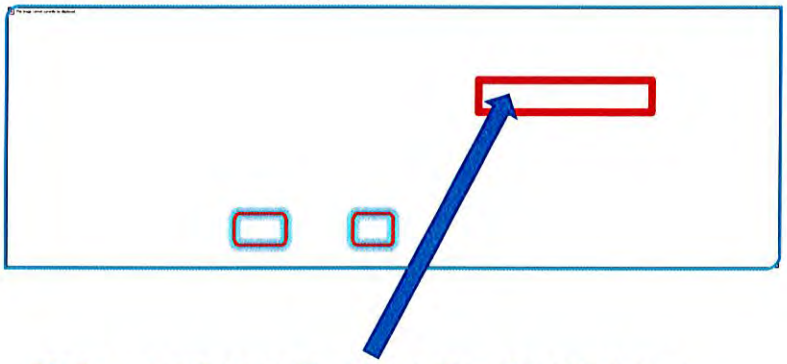
Make the appropriate changes to your settings.

Fields with a ⊞ are required.

- Click **Submit** to save your changes.



53



This section will allow the District to:

*** Generate PM work orders in advance of their scheduled due date, allowing the District personal more time to complete the work.**

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Active buildings Vs. Non Active Buildings

Active buildings are indicated by a thumbs up symbol
Non-Active or hidden buildings are indicated by a thumbs down symbol

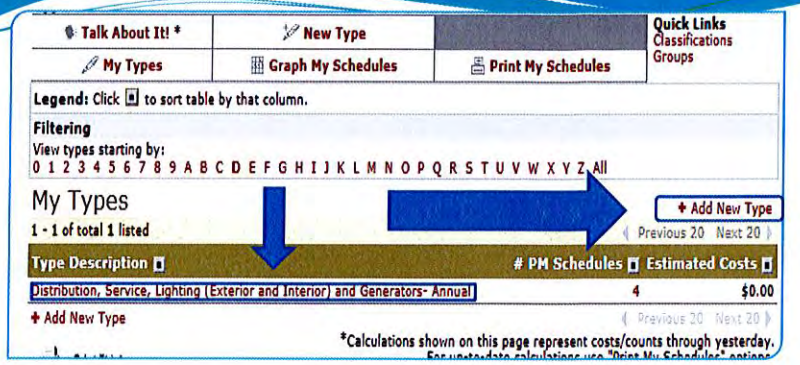
55

This arrow indicates where districts can access the Types section under the information analysis section of their PM Direct account.

Information Analysis

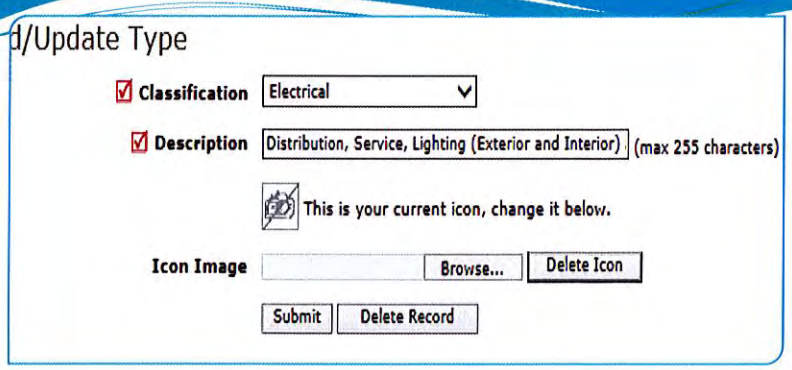
- Budget Codes
- Buildings
- Calendar Event Types
- Classifications
- Crafts
- Employees
- Equipment
- Groups
- Locations
- Manufacturers
- PM Schedules
- PM Templates
- PM Work Orders
- Projects
- Projected Purchases
- Saved Actions
- Suppliers
- Types

56



Click on either add a new type or click on an existing type to add content too that type

57



When this screen is present in the PM Direct account verify the correct classification then the description

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Division of Public School Academic Facilities and Transportation

Preventative Maintenance Schedule Suggestions

Purpose – This document has been prepared to give guidance and assistance to school districts to properly set up the district's computerized maintenance management system (SchoolDude) which is provided by the state. These suggestions are offered in an attempt to assist the districts in restricting unnecessary or burdensome duplications of the PM schedules. While these remarks are [illegible] it is highly recommended that the suggestions be followed as closely as [illegible] for the Division to get accurate and consistent data for the Annual Report each July 1. Districts are allowed some flexibility in the assignment of coding. If you have any questions on this matter contact your Area Maintenance Manager at 501-682-4201

1. SITE

A. Combine the Types: Sidewalks, Canopies, Parking Surfaces, Fencing, ADA Access & Fire Lines into one Type. Enter one Bi-annual Schedule for one Building at each Location.
B. Playgrounds. Enter one Monthly Schedule for one Building at each applicable Location.
C. Grounds. Enter one Monthly (for Daily) Schedule for one Building at each Location.

2. ROOF

A. Enter one Bi-annual Schedule for each Building at each Location.

3. EXTERIOR

A. Combine the Types: Windows, Exterior Doors & Exterior Painting into one Type. Enter one Annual Schedule for each Building at each Location.

4. STRUCTURAL

A. Combine the Types: Foundations, Wall Systems, Masonry & Concrete into one Type. Enter one Bi-annual Schedule for each Building at each Location.

5. INTERIOR

A. Combine the Types: Flooring, Walls, Ceilings, Interior Doors & Stairways into one Type. Enter one Annual Schedule for each Building at each Location.

6. HVAC

A. Air Filters. Enter one Monthly Schedule (1 to 2 months) for each applicable

1

59

Building at each Location.
B. Combine the Types: Split Systems, Package Units, Ventilation Systems & Controls into one Type. Enter one Annual Schedule for each applicable Building at each Location.
C. Chillers. Enter one Monthly (for Daily) Schedule for each applicable Building at each Location.
D. Cooling Towers. Enter one Bi-annual Schedule for each applicable Building at each Location.

7. ELECTRICAL

A. Combine the Types: Distribution, Service, Lighting (Exterior and Interior) & Generators into one Type. Enter one Annual Schedule for each Building at each Location.

8. PLUMBING

A. Combine the Types: Fixtures and Components, Water Piping, Water Heaters & Sewer into one Type. Enter one Annual Schedule for each Building at each Location.
B. Backflow Preventers. Enter one Annual Schedule for each applicable Building at each Location.
C. Well Systems. Enter one Monthly (for Daily) Schedule for one Building at each applicable Location.

9. FIRE & SAFETY

A. Fire Extinguishers. Enter one Monthly and one Annual Schedule for each Building at each Location.
B. Kitchen Hood Suppression Systems. Enter one Bi-annual Schedule for each applicable Building at each Location.
C. Fire Alarms. Enter one Monthly Schedule and one Annual Schedule for each Building at each Location.
D. Fire Sprinkler Systems. Enter one Annual Schedule for each applicable Building at each Location.
E. Emergency Lights and Exit Lights. Enter one Monthly Schedule for each Building at each Location.

10. TECHNOLOGY

A. Optional

11. SPECIALTIES

A. Kitchen Equipment. Enter one Bi-annual Schedule for each applicable Building at each Location.

2

Combine the types into (1) PM Schedule per building.

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B. Elevators and Wheel Chair Lifts. Enter one (1) annual Schedule for each applicable Building at each Location.

12. SPACE UTILIZATION

A. Optional.

Revised January 10, 2011

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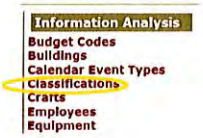
Referencing Classifications

Clicking on the classifications type will allow districts to see how many classification that they have setup by building.

The classification consistency exceptions are HVAC, Fire & Safety, Plumbing, Site, and Specialties.

There is a reason why purpose codes are called classifications in PM Direct. The SchoolDude system can not use the purpose codes in both systems, so they had to change it in PM Direct to classifications.



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Classifications continued

With this section there should be consistency with the classifications and the number of PM Schedules under each.

Some buildings that are non-academic can be combined into an Athletic Complex and another example is Portable Buildings.

A great example is that once a roof schedule is generated then check all press boxes, concessions, and equipment storage buildings with that (1) PM Schedule under roof for all the athletic complex buildings.

My Classifications

+ Add New Classification

1 - 15 of total 15 listed

< Previous 20 Next 20 >

Classification	# PM Schedules	Estimated Cost
Discontinued	7	$0.00
Electrical	14	$18.75
Exterior	10	$0.00
Fire & Safety	16	$0.00
HVAC	47	$22.50
Interior	5	$0.00
Other Miscellaneous	0	$0.00
Plumbing	12	$0.00
Roof	41	$18.75
Site	22	$0.00
Space Utilization	0	$0.00
Specialtes	6	$0.00
State Mandated Inspection	83	$3.44
Structural	9	$0.00
Technology	4	$0.00

+ Add New Classification

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PM Schedule Steps

Steps that are required by the Division to complete a PM Schedule.

PM Schedule

✓	1	Title Carter ES Pre- K Exterior (annual)
✓	2	Classification Exterior
✓	3	Type Exterior Doors & Windows,...
	4	Manufacturer
✓	5	Location Carter ES
✓	6	Building Pre-K
	7	Equipment
	8	Select PM Template
	9	Job Start Up
	10	Safety Points
	11	Tasks & Procedures
	12	Tools
	13	Parts
	14	Journal Notes
✓	15	Codes & Assignment
✓	16	Frequency
	17	Create Template
✓	18	Setup Schedule Now

Create Template

Show PM WO's

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Step 7- Equipment

This is where the districts can go in and start tracking their manufacturers warranties if they are not already tracking them.

This could mean the difference in the districts having to purchase all new roof top units or just a minimal number due to the manufactures warranty period.

Step 7- Equipment (Potential cost saving step for districts that incur tight budgets.)

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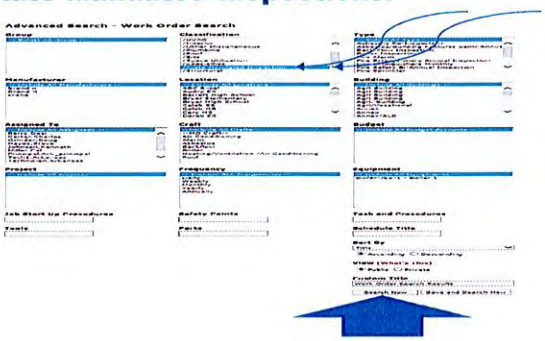
State Mandated Inspections

To search for the State Mandated Inspections go to the Advanced Search Box and under classifications Select State Mandated Inspections.



66

The picture indicates how all State Mandated Inspections should be setup

Advanced Search - Work Order Search

1 - 14 of total 14 listed

First | Previous | Next | Last

Schedule Title	Frequency	Classification	Type	Manufacturer Location	Last WO Id WO Status	Next Projected Generation Date
State Mandated Asbestos Drop Cover 3 Yrs	Yearly	State Mandated Inspections	Asbestos Fire Inspection		1,000 Complete	7/15/2016
State Mandated Asbestos Inspection	Yearly	State Mandated Inspections	Asbestos Building Nature Semi-Annual Inspection		1,000 Complete	7/15/2016
State Mandated Backflow Prevention	Yearly	State Mandated Inspections	Back Flow Prevention		1,000 Complete	7/15/2016
State Mandated Boilers/Water Heat Annual	Yearly	State Mandated Inspections	Hot Water Boilers and Heaters		1,000 Complete	7/15/2016
State Mandated Elevators and Lifts	Yearly	State Mandated Inspections	Elevators and Lifts		1,000 Complete	7/15/2016
State Mandated Fire Alarm Annual	Yearly	State Mandated Inspections	Fire Alarm		1,000 Complete	7/15/2016
State Mandated Fire Extinguisher Annual	Yearly	State Mandated Inspections	Fire Extinguishers Annual Inspection		1,000 Complete	7/15/2016
State Mandated Fire Extinguisher Monthly	Yearly	State Mandated Inspections	Fire Extinguishers Monthly		1,000 Complete	7/15/2016
State Mandated Fire Safety Inspection	Yearly	State Mandated Inspections	Fire Safety Bi-Annual Inspections		1,000 Complete	7/15/2016
State Mandated Fire Sprinkler	Yearly	State Mandated Inspections	Fire Sprinkler		1,000 Complete	7/15/2016
State Mandated Food Service Annual Drop	Yearly	State Mandated Inspections	Food Service		1,000 Complete	7/15/2016
State Mandated Kitchen Hood	Yearly	State Mandated Inspections	Kitchen Exhaust Hood Fire Suppression		1,000 Complete	7/15/2016
State Mandated Natural Gas System Annual	Yearly	State Mandated Inspections	Natural Gas System Annual Inspection		1,000 Complete	7/15/2016
State Mandated Sewage Treatment 3 years	Yearly	State Mandated Inspections	Sewage Treatment Systems		1,000 Complete	7/15/2016

First | Previous | Next | Last

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State Mandated Inspections, *continued*

* The difference between State Mandated Inspections and regular by building PM Schedules is that State Mandated Inspections are labeled as all locations and all buildings.

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