

# EvolveFM™ Operations & Maintenance

## The Tools You Need to Effectively Manage Your Physical Environment

EvolveFM delivers functionality for all your basic operations and maintenance management needs, including both demand and preventive maintenance. EvolveFM provides three main components to help you and staff manage maintenance activities: Requester, Call Center, and Maintenance.

### Requester

The EvolveFM Requester component provides a simple web form that anyone with web access may use to submit requests to have some service performed within the facility. The details contained in each request are controlled by how your EvolveFM system administrator sets up your request forms.

Based on administrator preferences, each submitted request can be either manually or automatically routed to the technician responsible for making the repair. The EvolveFM Requester component then provides an automated activity feed to keep the requester informed of the status of their work request,

thus reducing check-in calls to the facilities team so you can focus on getting work orders completed as quickly as possible.

### Call Center

If your organization employs a call center to take work requests live over the phone, then the EvolveFM Call Center component is a must-have tool. Similar to the Requester component, call center staff will use online forms to create

and manage requests, and funnel them into the EvolveFM Maintenance component where work orders are generated and managed.



### Maintenance

#### On Demand Maintenance

With EvolveFM, you have the option of whether online work requests from the Requester and Call Center components are automatically or manually converted to work orders and routed to technicians. When handled manually, the EvolveFM Maintenance component allows your team to review each work request and efficiently prioritize, generate the work order, assign resources and manage each work order until it is closed. Work requests can even be routed to supervisors when necessary to determine appropriate action.

The EvolveFM Maintenance component is highly customizable. For example, you can set up user access for technicians to only see those work orders that are assigned to them. Additionally, materials, trades and priorities can be assigned as needed. Documents, details, contacts and location information can be included in work orders to ensure each technician is supplied with the necessary details to complete repairs promptly.

### Preventive Maintenance

In addition to on-demand maintenance, EvolveFM helps you manage all your preventive and scheduled maintenance. Any work request can be made repetitive by filling out a few additional fields defining dates, times and frequency.

You may assign your scheduled maintenance requests to a single asset, or add multiple assets if needed. Your scheduled maintenance work requests are automatically generated in advance of their due date and are made available for assignment and review. You can even add reminders to the facility manager main menu for important scheduled maintenance activities.

## EvolveFM Operations & Maintenance Feature Summary

Whether your organization prefers a highly automated rules-based system that gets a work request into the hands of a technician virtually

automatically, or a more manual system where helpdesk personnel or supervisors make decisions about when and who handles a particular work order, the EvolveFM Operations & Maintenance system is a great fit.

- **Create, receive and route web-based work requests** - the work request is the basic communication tool for reporting a problem in the facility to management so that action can be initiated to get it fixed.
- **Obtain approvals as part of the workflow if necessary** – EvolveFM accommodates workflows that mirror the organization's processes for getting work done.
  - **Receive alerts on critical issues in the workflow**  
- EvolveFM allows for prioritizing work that needs to be done and the ability to track that work.
  - **View a comprehensive list of work orders in process**  
– EvolveFM provides activity feeds, data grids and reporting capability that allows management to see what work has yet to be completed and how old that work is.
- **View overdue work, or sort work orders on a place, space, asset or technician basis**  
– EvolveFM offers facility managers various tools and reports so they can have the information they need to keep the facility running smoothly.
- **Assign work orders to available personnel** - it's important to be able to match up work orders to maintenance staff based on their availability and skill sets.



- **Link related work orders** - being able to group work orders allows for more efficient assignment of work to be done.
- **Attach documents, including drawings and specs, etc.** – EvolveFM lets you see drawings, pages of repair manuals and other documents, which speed up asset repair and maintenance process.
- **Track costs associated with work orders** - being able to track and report the cost of work performed allows you to better manage operational costs.
- **Send work order instructions to PDA** – EvolveFM lets you send email notifications defined in your workflow to all stakeholders who need to be kept informed.
- **Define a work order schedule** – EvolveFM lets you schedule work to be done and can either proactively inform your customers who submit work requests or let them query their requests to see who will be doing the work and when it will be done.
- **Attach work orders to a work order schedule** - maintenance managers can assign open work orders to maintenance staff based on skill sets and availability.
- **Create and update a Task Schedule of pending work orders** - maintenance managers use task schedules to keep track of what work is being done and when.
- **Schedule and manage prevent maintenance** - Any work request can be made repetitive by filling out a few additional fields defining dates, times and frequency; add reminders.

## System Requirements

### IIS Server

- Web Server Microsoft® Internet Information Server 6 or later
- Adobe Flash Player ActiveX (for IE) v 10.1+ (32 Bit required)
- .Net Framework 4.5 or higher

### SQL Server

- Operating System Microsoft® Windows® server 2003 or later
- SQL Server 2008 r2
- SQL Server Management Studio
- Microsoft SQL reporting Services(optional)

### Client

- Operating System Microsoft® Windows® XP Professional SP2, Microsoft®
- Windows® Vista (Enterprise, Business, Ultimate, Home Premium)
- Browser Microsoft® Internet Explorer 8 or higher

\*\*\* for the latest system requirements for Microsoft products see [www.Microsoft.com](http://www.Microsoft.com)