CMMS Requirement Summary

Functional Requirements

These points identify the main functionality required from the software. Specific requirements are listed further below.

- Preventive, Corrective and Request(billable) work order handling, including billable and non-billable work orders with cascading asset hierarchy and flexible work order structure for multi-trade and portfolio-based assignments.
- Time reporting for complex collective agreement rates applied to work orders and integration into Peoplesoft for HR and payroll.
- Inventory management with flexible tracking, costing applied to work orders and integration into Peoplesoft financials.
- Job costing including labour/time and parts/supplies for billable work orders and analysis.
- Flexible, easy reporting, dashboards, and exports for analytics.
- Mobile capability (via cellphone) and browser based.
- User friendly and efficient interface.

Specific Feature Requirements

These points identify anticipated key feature requirements in narrative form for initial understanding and discussion purposes.

A more detailed listing of functionality that is required, preferred and optional will be provided during the procurement phase of this project.

Assets

- Standardized hierarchy, naming convention with multiple levels including campus, area, building and then assets with hierarchy like Uniformat II.
- Attachments of all kinds connected to asset and available to mobile users as well. Includes all main document types from Microsoft, Adobe PDF, Image formats and CAD formats.
- Accommodate bar codes / QR Codes on assets and printed on work orders, etc. with scanning enabled via mobile phones.
- Tracking labor and inventory costs by asset (at lowest level with roll up)
- Asbestos flag for buildings and attachment of asbestos inventory.

Work Orders

- Attachments of all kinds with work order like Assets, including ability to add attachments via Mobile in the field (i.e., photographs) or Web browser.
- Work order status categories with comments by status, notifications, etc. (i.e., for delay, waiting for parts, re-schedule, work complete, etc.)
- Flexible assignment of work orders to assets, trade, building, area/zone, campus, trade including batch assignment, automatic assignment based on work order type, manual assignment (via planner or supervisor/manager)

- Assignment by zone instead of actual trade, then when trade accepts work order, they become the assignee. Ability to track, report, manage work orders by zone as well.
- Job Safety Analysis attached to WO and available to read by technician, with requirement to tick off that it was read and adhered to.
- Re-assignability of work orders (example: first to building automation team, then re-assigned to trade staff)
- Multiple resources on work order (example: building automation team + one or more trade staff) – or a parent/child relationship.
- Notifications for priority work orders or at different stages of work order milestone. Process or user ability to select notification or not.
- Automatic generation of work order based on BAS alarm, other interfaces.
- Easy to find duplicate request and either connect work orders or ensure only one work order is generated.
- Unlimited space for adding notes and comments, searchable, organized, etc. Ability to flag people, etc. and dialog within the work order.
- Enable 'ongoing' work orders that are open for a fiscal year and accumulate time, costs, comments. (With discrete tracking of time and costs for audit/analysis purposes)
- Resource management – work order labour time requirements, totals, matching resources, availability based on individual schedules, vacation, time off, etc.
- Warranty Flag (and warranty certificate or supplier) for work orders on a warranted asset.
- MS Teams (or similar tool) integration for communication on work orders.
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Preventive Maintenance
- Ability to schedule maintenance with odd timings (summer only, winter only, non-recurring patterns, etc.)
- Ability to schedule a single PM for a group of like assets in a single building with ability to easily apply/track time and costs by asset if needed.
- Work order/PM includes parts, tools, or supplies list for the job, including part numbers, quantities, inventory numbers, etc. for easy ordering or automatic ordering.
- Estimated hours in the system for each task and actual time applied, for analysis and work loading.
- Inspection checklist for PM where required and fillable via handheld.
- Ability to add a corrective work order as a child to a PM work order for work that comes from a PM routine.

User Interface
- Include tips / info boxes for guidance on entering fields.
- Long or unlimited length for comments and other information.
- Self-populating and drop-down lists to reduce typing and ensure consistent spelling of key fields.
- Ability to flag fields as required for populating. (i.e., fault code, comment, etc.)
- Dashboard for performance and work order progress, including all status, past due times, etc.
- Dashboard for costs by work order, asset, building, etc.
- Macro ability for populating with frequently used text (Macro set up by user)

- Autofill based on first letters or numbers typed in key fields such as building numbers, account codes, names, etc.
- User configurable pages, preferences, etc.
- Easy search for entity numbers, work orders (single search, not multiple clicks)
- Control user access and capabilities by role, user, etc.
- Least number of clicks, use drop down population, single page, pre-selected fields for some activities, etc. for efficiency and ease of use.

Integration
- Improved error reporting and handling, so entire file won't be rejected due to one error (if file upload is part of integration)
- Matterport 3d integration
- Integration with VFA/Slamcap (i.e., capital planning software)
- BAS integration for alarms
- GPS tracking (GoGPS)
- Tree inventory integration (Arch GIS)
- Integration with room booking (via Archibus) to know which rooms are in use.

Reporting
- Built in reporting
- Additional sorting, filtering, column selection, cross tables, etc.
- Easily export to excel with sort, filters, field selection, etc.

Time Tracking
- Transfer of time to 'timecards' and integration with PeopleSoft automatically based on work order entries
- Validation for timecard entry to remove possibility of error – or messages 'do you really want to do this'
- Copy over a timecard from previous period.
- Audit trail for all changes
- Able to select days and post a selection of timecards, in addition to one by one or all.
- Sickness time off, etc., with totals, tracking, etc.
- Track wide variety of different job types and pay rates, premiums, extra pay based on certification, applied to regular and overtime pay, etc.
- Track actual clock time of work activity (i.e., scan in and scan out on a task, work order, job, etc.)
- Vacation balance tracking – historical and remaining
- Ability to revise incorrect or timecard entries
- Limit charging to work order except to actual assigned trade person(s)
- Single work order with different trades/assignees or child work orders for different trades.

Inventory Tracking
- Automatic inventory check and ordering based on work order needs.
- Automatic notification to assigned trade when inventory item is available (ordered or packaged for the trade person).

- Flexibility and easy to modify for changes to quantities, sizes, et.
- Ability to use average inventory price for billables and for tracking costs to work order.
- Ability to include a markup (a % or $ for billable, 0 for non-billable) Ideally flexible based on client being billed or product.
- Need to readily separate and identify tax paid on inventory.
- Barcode scanning for products to add to inventory.
- Backorder reports based on trade, work order, etc.
- Re-order either automatically or notify manager for re-order decision, based on selection.
- Batch changes when new vendor is used for product (change price, part number, quantity, vendor name, etc.)
- Ability to have inventory located at remote locations or on trucks, different departments, etc.
- Need Inventory matching between inventory system and PeopleSoft